

Comparative Study of Work-Life Balance in Franchised and Independently Owned Small Business Models

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**Comparative Study of
Work-Life Balance in
Franchised and Independently Owned
Small Business Models**

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B.Bus (UTS), M.Ed (QUT)

**Submitted in fulfilment of the requirement for the degree of
Doctor of Philosophy in Marketing**

Department of Marketing

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Abstract

Work-life balance is a concept that has attracted attention for several years. It is relevant as people attempt to apportion time to different demands they face from both work and life. The multiplicity of demands that individuals have can increase this challenge as people strive to incorporate many more activities into lives. The focus of current literature regarding work-life balance tends to focus on how employees can be provided with opportunities by their organisations for achieving this elusive balance. Research has been conducted into various strategies that organisations have implemented to facilitate their employees' lifestyle options. Furthermore, studies have examined the role of organisational initiatives and staff retention. However, many of the organisations providing these opportunities for employees have substantial resources, thereby enabling the provision of these initiatives.

Previous empirical research has examined work-life balance in depth. However, there are aspects that call for further attention. In particular, the management of this concept within small business requires further research. Australia has a large number of small businesses, which comprise a large proportion of the labour force and contribute significantly to the national economy. The broad category of small business includes different business models, and two of these models are the independent and the franchised business. The success of these models has been demonstrated by their rapid growth in the Australian economy.

As one of the reasons most commonly cited for entering into a small business is to regain the control over one's life and work-life balance, the purpose of this research is to investigate work-life balance from the perspective of small business owners. Examination of different research issues considering the perception of work-life balance, the impact of control, of owning a small business, and the choice of business model on work-life balance is undertaken. The research considers how small business owners perceive the concept of work-life balance, and whether it is regarded as important to them. This research seeks to understand how work-life balance is viewed differently for small business owners. The concept of control requires examination to clarify how control and work-life balance relate to each other. Due to the popularity of franchising in the small business sector, a comparison of the concept of work-life balance by both franchised and independent small business owners is warranted.

Previous conceptualisations of work-life balance centring upon employees of larger organisations provided useful guidelines as to how the challenges with this concept may be addressed. However, these guidelines do not appear appropriate for small business owners. Due to the interest in the concept, sector and subjects, and the apparent gap in the literature, this research sought to investigate the following question:

“How and why does work-life balance differ in a franchised business and an independently owned, (non-franchised) business?”

Qualitative research was determined to be most suitable approach in answering the research question as little was known about the subject area. The nature of qualitative research allows the researcher to have access to the subjects and to gather in-depth information. The research was designed to determine how and why the participants perceive their situations as they do, which is also consistent with the chosen methodology. The most suitable paradigm was realism, as the topic under investigation represents a current, real world issue.

Case study data was collected, comprising 20 cases of 10 matched pairs of business owners. The pairs consisted of one franchised and one independent business, in matched locations. Data sources included, in-depth interviews, personally administered questionnaires, and interviewer observations. There are a total of 70 data sources including 30 in-depth interviews. All cases were interviewed at least once, and half were interviewed twice. Data analysis was facilitated by the use of NVivo software through coding of the large quantity of data collected. Themes that emerged from the analysis were used to discuss the research issues in light of prior research findings.

This research has contributed to the extant literature by extending the understanding of work-life balance, and how it applies within the small business context. The emphasis has shifted from the provision of conditions by employers, to one of self-management. Two models have been developed which contribute to theory, in that they provide a new approach to the concept of work-life balance. In addition, this research contributes to management practice through revealing the importance that individuals place on their ability to control their own decisions. Hence, the models that have been developed facilitate an individual’s ability to enhance his/her lifestyle by enabling an inclusive analysis of an individual’s personal situation and presenting a

management tool that may be used to plan for changes if necessary. The research also identifies the impact of support networks in enhancing work-life balance, and provides insights for franchisors regarding the development of management practices that will enhance lifestyle opportunities for franchisees.

This research has contributed to the body of knowledge on work-life balance in franchised and independently owned small businesses, as it is the first empirical research in Australia that concurrently investigates work-life balance in both franchise and independent small business situations.

This research has made contributions in that it is one of the first to:

- Synthesise existing cross-discipline perspectives on work-life balance;
- Investigate work-life balance from a business owner's perspective;
- Compare work-life balance outcomes between independent and franchised small business owners;
- Use a qualitative methodology to explore and explain different ways of viewing work-life balance , such as considering the impact of personal control rather than focusing on quantifying time spent on different tasks;
- Investigate the importance and role of control in managing work-life balance;
- Identify means for franchisors to improve the opportunities for their franchisees to have better lifestyles;
- Investigate how managing the intergenerational attitudes towards work may affect the business owner's ability to obtain work-life balance, and provide recommendations for managing Generation X and Y employees;
- Develop an interactive analysing, planning and management model for use by individuals to facilitate improved work-life balance; and
- Introduce new parameters so that work-life balance is viewed as 'life', which includes a multiplicity of roles, the demands of which vary at

different life stages. Therefore, work-life balance is not an outcome, but a process.

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Statement of original authorship

I certify that the ideas, research work, results, analyses, and conclusions reported in this dissertation are entirely my effort, except where otherwise acknowledged.

I also certify that this work has not been previously submitted for a degree or diploma in any university. To the best of my knowledge, and belief, the thesis contains no material previously published or written by another person except where due reference is made in the thesis itself.

Signature of Candidate

Date

.....
Robyn Young

.....

ENDORSEMENT

Signature of Principal Supervisor

Date

.....
Professor Lorelle Frazer

.....

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Related presentations during the course of this research

FRANCHISING RESEARCH SEMINAR

JUNE 2ND 2003

Griffith University, Logan Campus

Topic: Franchisees and independent small business operators- a comparison

FRANCHISING RESEARCH SEMINAR

FEBRUARY 16TH 2006

Griffith University, Logan Campus

Topic: Work-life balance in small business

FRANCHISING RESEARCH SEMINAR

SEPTEMBER 27TH 2007

Griffith University, Logan Campus

Topic: Work-life balance in small business

Women in Technology / Biotech Chapter

The Professional Development Series

MARCH 12TH 2008

McCullough Robertson Law Firm

Topic: EQ and leadership

NFC08

SEPTEMBER 17TH 2008

Research Symposium

Topic: Work-life balance

Consultations

October 2002

Meeting with Professor Rajiv Dant (Clarkson University USA): This meeting with Professor Dant focused on clarifying a research topic. The initial intended area of study was discussed as were the many areas current franchising research.

Outcomes: Review of areas of research and consideration of areas of interest which led to further investigation of the concept of work-life balance in small business, particularly franchised small business.

June 16th, 2008

Meeting with Dr Marilyn Healy (formerly Queensland University of Technology) regarding methodology: Dr Healy recommended clarification of explanation of research design and replication logic. She also confirmed the use of realist paradigm and suggested the inclusion of a diagram at the end of Chapter 2 to demonstrate the expected outcomes of the research based on the extant literature.

Outcomes- Diagram was included in Chapter 2. Greater detail was added about replication logic, including tables, and the research design.

Chapter 1: Introduction

1.1 Introduction

This chapter outlines the information provided in the following four chapters of this thesis and includes a brief review of the current literature on work-life balance within the context of small business and franchising. The research questions and issues that emerged from the review of the literature will then be outlined. The importance and significance of the research issues will be discussed with particular consideration given to the size and significance of the small business sector within Australia and the importance of franchising within this sector. Next, the theoretical contributions and the contributions to management practice arising from the results of this research will be discussed. Methodological considerations will then be summarised and salient delimitations of the research presented. Definitions and key terms used in this thesis are then detailed. Finally, a diagrammatic representation of the thesis structure will be presented.

1.2 Background to the research

This research concerns work-life balance in small business models and *compares* work-life balance situations for both the owners of franchised and independently owned non-franchised (hereafter referred to as independently owned) small businesses. The literature providing background for this research encompasses work-life balance, small business and franchising domains. Currently, there is considerable research being independently conducted in all of these fields (for example, Stanworth and Kaufmann, 1996; Weaven and Frazer, 2006; Tremblay, 2002; Kinman and Jones, 2008), and (in some cases) these concepts are synthesised such as, work-life balance in small business (Dex and Scheibl, 2001; Daniel, 2004). However, it appears the three concepts have not

previously been examined together, and in-depth. The following discussion will provide a brief outline of current research in these disciplines so as to promote a clearer understanding of how the research issues and question were developed.

Work-life balance is the concept describing the challenge of balancing competing demands faced by individuals due to the multiple roles they fill. It has been a topic of interest for researchers for many years (for example, Clutterbuck, 2004; Dex and Scheibl; 2001, Eikhof, Warhurst and Haunschild, 2007; Hill, Miller, Weiner and Colihan, 1998; Lewis, 2001; Towers, Duxbury, Higgins and Thomas, 2006; Wilkinson, 2008). The genesis of interest in this topic occurred because of the changing structure of the workforce, particularly when women entered the workforce during World War II (Roberts, 2007). Over the last two decades the need to provide the opportunity for work-life balance has been recognised by organisations as they strive to recruit and retain staff (Lewis, 2003; Wise and Bond, 2003; Lewis, Rapoport and Gambles, 2003) and try to improve financial performance (Rayman, Bailyn, Dickert and Carre, 1999; Burke, 2000).

Some of the research has focused on gender issues associated with work-life balance (Spinks, 2004; Connell, 2005; Still and Timms, 2000; Straub, 2007; Smithson and Stokoe, 2005; Litz and Folker, 2002) including concepts such as options for career advancement (Paus and Traut-Mattausch, 2008; Posig and Kikul, 2004), role conflict between family and work (Marchese, Bassham and Ryan, 2002; Shelton, 2006; Noor, 2004), and alternatives for managing a career such as home-based businesses (Walker, Wang and Redmond, 2008; Loscocco and Smith-Hunter, 2004).

Other work-life balance research has focused on the changes in *technology* (Towers et al., 2006; Hill et al., 1998; Tremblay, 2002), *society* (Lewis, 2001; Lewis et al., 2003, Connell, 2005), and the way in which people view the *role of work* in their lives (Eikhof et al. 2007; Porter, 2004; Hughes, 2007; Burke, 2000a; Isles, 2004; Russo and Waters, 2006). There has also been a focus on how the above changes have impacted on organisations, as they recognise the need for employees to have the opportunity for life activities whilst being productive in the workplace (Blyton, 1991; Bardoel, 2003; Kinman and Jones, 2008).

Much of the research that has been conducted in this field has focused on large organisations (see Evans, 2000; Hacker and Doolen, 2003; Moore, 2007; Hyman and Summers, 2004). The emphasis being on how employees can derive work-life balance through accessing the *policies* these organisations have in place to facilitate lifestyle (Wise and Bond, 2003; Clutterbuck, 2004; Posig and Kikul, 2004). Generally, the consensus is there are different challenges emerging for organisations due to the different generational cohorts' attitudes to work. Different approaches to work-life balance in 'Baby Boomer' cohorts and the more recent entrants into the labour force, such as Generations X and Y (Glass, 2007; Martin, 2005; Westerman and Yamamura, 2007; Sirias, Karp and Brotherton, 2007) have provided challenges to organisations.

The older generations tended to be more inclined to sacrifice lifestyle for work (Sirias et al., 2007) during the earlier stages of their careers. It has been well documented that as this group is reaching retirement age, they provide value to an organisation in terms of experience, commitment and autonomy and so organisations are attempting to retain these employees by introducing initiatives that will enhance their lifestyle (Brown, 2004). In comparison, newer generations are less inclined to demonstrate the same level of initiative, loyalty and patience with career advancement, as previous generations (Glass, 2007; Martin, 2005). Their inclination to change employers without significant prompting, and desire for rapid career progression together with a good lifestyle, has made it important for organisations to provide members of these generations with work environments that emphasise work-life balance (Westerman and Yamamura, 2006).

While the major emphasis in the work-life balance literature has been in relation to large organisations, less research has been undertaken in small organisations (for example, Walker et al., 2008; Dex and Scheibl, 2001; Loscocco and Smith-Hunter, 2004; Daniel, 2004; Buttner and Moore, 1997). These organisations are less likely to have the time and resources to participate (Litz and Folker, 2002). Research about work-life balance in the context of small business has traditionally emphasised the challenges for and benefits to employees, (Maxwell, Rankine, Bell and MacVicar, 2007) rather than considering the impact on business *owners*. Some of the research focuses on the decision made by individuals to leave large organisations and enter into small business

so as to regain some control over their lives (Daniel, 2004; Walker, et al., 2008; Smith, 2000; Buttner and Moore, 1997). Other research being conducted includes: the benefits and risks of entering into small business (Kaufmann, 1999), motivations to start a small business (Stanworth and Kaufmann, 1996; DeLollis, 1997), entrepreneurship in small business (Thurik and Wennekers, 2004), training in small business (Walker, Redmond, Webster and Le Clus, 2007), options for home-based small business (Walker et al., 2008), women opting out of corporate careers for small business (Coleman, 2002; Shelton, 2006) and individuals seeking autonomy through small businesses ownership (Prottas, 2008; van Geldren and Jansen, 2006). Though these issues do not specifically investigate work-life balance they allude to it in some ways, particularly when considering the role of autonomy and taking back control of one's life (van Geldren and Jansen, 2006). Similarly, the research about career changes and entrepreneurship has investigated control, however assessments of work-life balance in small business specifically are limited.

Franchising represents a derivation of small business. It allows a parent company, (the franchisor), to appoint other operators, (the franchisees), to replicate the service, product or brand name (Doherty and Quinn, 1999; Mendelshon, 1999). Franchising takes different forms such as business format franchising (Alon, 2001) in which the franchisor provides a business system that includes training, reporting and support to the franchisees, in return for upfront fees and ongoing royalty payments (Duckett, 2008). A large amount of research has been conducted in the field of franchising as this business model is one that has received a significant rate of uptake and acceptance. Franchising as a business model can be found in many countries (Watson and Kirby, 2004; Quinn, 1999), and the growth of franchising in Australia is testament to the success of this business concept (Wilkie, 2007).

Research examined in franchising includes themes such as franchising as a means of self employment (Kaufmann, 1999; Weaven, Isaac and Herington, 2007) or as a small business growth strategy (Stanworth, Stanworth, Watson, Purdy and Healeas, 2004). In addition the interrelationship of franchising and entrepreneurship (Timmons and Spinelli, 2007; Spinelli, Rosenburg and Birley, 2004; Williams 1998; Merrilees and Frazer, 2006) has been examined. Franchise failure has been another topic of interest

for researchers within the context of both franchisor and franchisee cessation of business operation (Stanworth, Purdy, Price and Zafiris, 1998; Castrogiovanni, Justis and Julian, 1993; Kirby and Watson, 1999; Hartcher, 2006; Buchan, 2008). In addition, changes in the nature of the franchisor/franchisee relationships has been investigated (Frazer, 2001), as has multiple unit franchising as an expansionary strategy (Grunhagen and Mittelstaedt, 2005; Frazer and Weaven, 2007). Another newer area of research has explored co-branding, where more than one franchise outlet is located on the one site (Young, Hoggatt and Paswan, 2001; Wright and Frazer, 2007; Wright, Frazer and Merrilees, 2007). There is a body of literature about the internationalisation of franchising which is reflective of the global growth of this business model (Hoffman and Preble, 2004; Doherty and Quinn, 1999; Alon and McKee, 1999; Moore, Fernie and Burt, 2000). The concept of intrapreneurship and its contribution to international growth has also attracted some attention from researchers (Maritz, 2006; Spinelli et al, 2004; Altinay, 2004). In addition, other research has investigated specific sectors in franchising such as the restaurant sector (Hing, 1999), and particular franchise systems such as fast food systems (Schmidt and Oldfield, 1999; Joyner, 2003; Wright et al., 2007).

Franchising has attracted a great deal of attention in the literature due to its significant contribution to the global economy (Dant, 2008; Frazer, Weaven and Wright 2008). In the 1970's Australia adopted this business model with the introduction of chains such as McDonald's and franchising has continued to expand (Wilkie, 2007). There was a 15 per cent increase in the number of franchised units between 2006 and 2008 and the density of franchised units per capita in Australia is three times greater than in the United States (Frazer et al., 2008; Frazer and Weaven, 2002). Thus, franchising is a popular small business model, perhaps due to marketing on the basis of risk reduction and lifestyle benefits (Blackie, 2008). However, the question remains as to whether franchising provides the opportunity for work-life balance.

The concept of work-life balance has received little attention in the small business literature. Only a small amount of research has been devoted to this concept and, (to the best of the author's knowledge), none within the concept of franchising. As individuals have identified some of the reasons for entering into their own small business as regaining control, increasing flexibility, having greater autonomy and greater

control over balancing work and family demands, (Stanworth and Kaufmann, 1996; DeLollis, 1997; Van Geldren and Jansen, 2006; Walker et al., 2008) it is important to determine whether these goals can be realised. Following a review of the extant literature four research issues and the research question emerged which will now be presented in greater detail.

1.3 Research question and research issues

The purpose of this research is to investigate the issue of work-life balance in small business, particularly from the independent and franchised business owners' perspective. The research question is:

“How and why does work-life balance differ between a franchised business and an independently owned (non-franchised) small business?”

The aim of this thesis is to investigate primarily *how* the owners of these businesses differ in the way they are able to achieve work-life balance and, secondly, *why* this is the case. As has been discussed, comparative assessment of work-life balance has not been made in the context of these two groups; hence, this research will provide new insights into this field. Although there is considerable discussion of work-life balance in the business concept, specific consideration in the context of alternative small business models will be of importance to both independently owned and franchise owners. Thus, the value of this research is the *merging* of these areas of interest into the single research project.

Fundamental to answering the research question is careful analysis and consideration of the research issues. These issues have been developed as a result of the analysis of the literature. The four identified research issues are detailed in Table 1.1

Table 1.1 Research issues

Research Issue 1a	<i>To what extent do individuals determine their work-life balance?</i>
b	<i>To what extent is work-life balance of concern to them?</i>
Research Issue 2	<i>How does starting a small business provide an opportunity for individuals to improve their work-life balance?</i>
Research Issue 3	<i>To what extent does small business ownership provide individuals with greater control over their lives?</i>
Research Issue 4	<i>To what extent does the business model (franchised vs independent) affect work-life balance?</i>

Source: developed for this research

Changes have occurred in the workplace leading to a blurring of the boundaries between work and life. For instance, the introduction of technology has meant work can be conducted at home (Towers et al., 2006), and in some cases employees have established home offices so they can telecommute to their main offices (Hill et al., 1998) or have established home-based businesses (Walker et al., 2008). Alternatively there have been examples of individuals who engage in life activities whilst in the workplace such as answering personal emails. The ubiquity of the internet means that it can be used for personal use as well as work (Lewis, 2003). Furthermore individuals derive a sense of identity from their work (Ahmad, 2003; Ciulla, 2000) as well as a sense of satisfaction from their achievements (Isles, 2004). As a consequence of these and other changes it has become more difficult to differentiate work and life activities thus giving rise to the first research issue:

Research Issue 1a: To what extent do individuals determine their work-life balance?

b: To what extent is work-life balance of concern to them?

As the current literature indicates that individuals start small business to regain control over their decision-making (Smith, 2000; Buttner and Moore, 1997), improve their work flexibility (Evans, 2000), increase their financial rewards (Walker and Webster, 2007) and provide opportunities to improve their work-life balance (Daniel, 2004) it is important to investigate whether these stated goals became a reality. Furthermore, it is important to determine whether small business ownership provides individuals with the opportunity

to achieve greater control over their lives and improve their work and life balance. Thus, the second and third research issues are:

Research Issue 2: How does starting a small business provide an opportunity for individuals to improve their work-life balance?

Research Issue 3: To what extent does small business ownership provide individuals with greater control over their lives?

The first three issues consider the issue of work-life balance from the more inclusive viewpoint of small business in general; however this research seeks to understand the differentiating factors between franchised and independent small businesses. Investigating the different business models provides a basis for comparison which will enhance an understanding of whether achievement of work-life balance is influenced by the business model and why this is the case. Furthermore, it will provide an opportunity to assess the appropriateness of past and current marketing initiatives focusing upon franchising as a lifestyle choice. Hence, the fourth research issue is:

Research Issue 4: To what extent does the business model (franchised vs. independent) affect work-life balance?

The practical and theoretical justification for this research will now be discussed.

1.4 Justification for the research

1.4.1 Small business, franchised business and coffee shops

The economic and social *contribution* of small business to the Australian economy is acknowledged (Still and Timms, 2000; Walker and Webster, 2007). The Australian Bureau of Statistics reports that in Australia in 2007 there were 2,011,770 actively trading businesses (ABS, 2008) and there were 1.9 people owning and operating these businesses of which 96 percent were small business owners. Hence, there were over 1.8

million small business owners. These figures represent approximately 8 percent of the current total Australian population and approximately 16.7 percent of the total number of employed people in Australia as of October 2008 (ABS, 2008). Of the total number of operators based on the statistics released October, 2008 68 percent were male (therefore, 32 percent female) and 72 percent said they worked full-time in the business.

However, small businesses are often under-resourced both in terms of people (staff) and capital resources. There were 1,171,832 non-employing small businesses in Australia in 2007 (ABS, 2007) comprising 58 percent of all businesses. Of the 755,758 businesses employing less than 20 employees (therefore qualifying them as small businesses) just over 70 percent employed between 1 and 4 staff and approximately 30 percent employed between 5 and 19 employees. That is, just over 90 percent of the 839,938 business employ between 1 and 19 people; showing that small business contributes significantly to employment in the Australian economy. Small business are also valuable in an economy as they tend to be entrepreneurial (Thurik and Wennekers, 2004) and innovative (Georgiellis, Joyce and Woods, 2000), allowing them to adjust quickly to changing trends and market demands.

The above information considers the small business as one without distinguishing different business models; however the small business sector comprises both franchised and independently owned small businesses. Franchising as a business model has had significant growth globally over recent decades. In the United States where modern franchising was started, there are currently 1,500 franchising chains which have 760,000 franchisees employing 18 million people (Dant, 2008). In Australia some 1100 business format franchisors have been identified from a population of approximately 21 million (ABS 2008). The sector in Australia generates sales of approximately \$130 billion and the estimated 71,400 franchised units contribute to the economy through employment and product innovation. Franchise units comprise 37 percent of small businesses in Australia (Frazer et al. 2008; ABS 2008.) Of the franchised concepts in Australia 93 percent are local and only 5 percent are from the US (Wilkie, 2007). The remaining two percent of franchise operators originate from different international locations. Although franchised businesses are significant contributors to

the Australian economy, there is a lack of empirical evidence validating the lifestyle advantages often associated with this small business form.

As a sub sector of small businesses in Australia, *coffee shops* represent a substantial small industry group. In June 2007 there were 13,987 café and restaurant businesses in Australia (ABS, 2006-07) generating \$9.7 billion in income and employing 145,546 people (47.4 percent of whom were casuals). The value added by this sector in 2007 was \$5,695.5 million, representing 0.05 percent of GDP (ABS, 2006-07). The total income of the sector does not necessarily translate to a large income for many business owners as they are often required to work very long hours, and receive minimal financial remuneration when calculated on an hourly rate. According to *Restaurant and Catering Australia* the average hourly wage for owners is \$13.64, less than they pay the kitchen hands (Huckstep, 2008). Therefore, it does not appear that owners are afforded much opportunity to earn large incomes whilst operating these businesses.

As detailed above the small business sector, and franchised businesses as a part of that sector, is a major contributor to the Australian economy. The large number of people who are involved in owning and operating these businesses provides a significant contribution in terms of GDP and employment opportunities. Therefore it would appear reasonable that these small business owner/operators deserve to have the opportunity for work-life balance as much as the employees of other organisations or employees of small business. As such it is justifiable to conduct research into the work-life balance of franchised and independent coffee shop businesses. This research will contribute to theory and managerial practice of these businesses.

1.4.2 Theoretical contribution and contribution to management practice

This research examined an under investigated issue comparing independent and franchised business models from a work-life balance perspective. A significant contribution to theory is made in three main areas. Firstly, this study examined the work-life balance of small business owners rather than emphasising the role of employees (who have previously received some attention in the literature). Hence, it

provides insights into a large segment of the workforce who to date do not appear to have been considered. Secondly, it compared the owners of different business models, thereby providing data about lifestyle for these owners so future decisions regarding business ownership can be made with better information. Finally, the concept of work-life balance was redefined to be more inclusive and flexible and to assure a more holistic understanding of work-life balance. Work and life do not need to be considered separately, rather they may be integrated as 'life' with work representing one of the multiplicity of activities undertaken whilst enjoying life.

Based on the outcomes of the research two *models* were developed which may be used independently or in conjunction with one another. These models have been designed for use by business owners both as business tools and also as self-management tools. Both models will be of assistance to owners in developing an understanding of what causes them to feel satisfied or dissatisfied with their work-life balance and, will inform them as to what adjustments they may be required to make.

The contribution to management practice is for the owners themselves, and the owners of franchise systems who are consistently trying to recruit suitable new franchisees (Wilkie, 2007). A challenge for small business owners is that they often do not have access to sufficient staff, requiring them personally to work in, as well as manage their businesses. The research reveals that this issue is a challenge for most owners. However, it is also important for these individuals to be able to incorporate lifestyle choices into their lives. This research will provide guidelines for owner/managers of small businesses about more reflective operations management, so they can attend to the multiplicity of roles they wish to fill whilst running a successful business.

Franchising is growing in Australia yet it is known that not all franchisees are content with their situations (Frazer, 2001), and franchise failures do occur (Castrogiovanni, 1993). Recruiting suitable franchisees is a challenge (Wilkie, 2007) so it is important that franchisors have a good product to sell. This research will provide franchisors with insights into the value an individual places on lifestyle benefits whilst running a business. It will assist in understanding what the business owner is looking for

in terms of work-life balance and will indicate to franchisors what they can do better to accommodate these needs.

1.5 Methodology

A *qualitative* methodology has been used for this research as there is limited prior research on the issues developed (refer table 1.1). This methodology facilitates the investigation of a topic that has had limited prior research, it helps investigate multiple variables (Gummesson, 2006) and seeks to understand how the participants feel about their situations. This type of methodology provides the researcher with the opportunity to access subjects (Denzin and Lincoln, 2000) and glean in-depth information about how they feel about the issues being discussed (de Ruyter and School, 1998). As the research is based on the individuals' personal experiences, with the aim to determine how and why they feel the way they do about a variety of circumstances, there is a good fit between a qualitative approach and the desired outcome.

Within the qualitative methodology, research is being conducted in the *realist paradigm* (Healy and Perry, 2000). This paradigm is appropriate as the investigation seeks to understand real world and contemporary issues (Perry, 1998). Realism is considered to be inductive, and builds theory (Towers and Chen, 2008), but it is not purely inductive as is grounded theory (Glasser and Strauss, 1967). Rather it is along the continuum from inductive to deductive, as realism recognises the existence of a priori theory (Towers and Chen, 2008).

Prior theory relating to work-life balance, small business and franchising, guided the researcher when determining the data collection tools required to ensure appropriate data were gathered.

Case studies were used as the data collection method and each case had three separate data sources; a questionnaire, an interview and interviewer observation, which are all accepted data collection tools for this type of research (Fontana and Frey, 2000). The research question being asked is a 'how and why' question which is common and

acceptable for an explanatory study (Yin, 2003). Twenty cases were included in the study which is considered a substantial number for this type of investigation (Miles and Huberman, 1994; Perry, 1998), particularly as the work is in small business and it is often difficult to recruit numbers from that sample (Carson, Gilmore, Perry and Gronhaug, 2001). The cases consisted of 10 matched pairs that were matched for location, each pair consisting of a franchised and an independent business. Seven pairs were in urban locations and three pairs were in regional locations, which is reflective of the industry as a whole, as approximately 76 percent of cafes and restaurants in Australia are in metropolitan areas with the remaining 24 percent in regional areas (ABS, 2006-07). Thus, purposeful sampling was undertaken (Alam, 2005; Cavana et al., 2001; Gummesson, 2000). The research design was set out to ensure both theoretical and literal replication and the factors considered were business model and the existence of dependent children (Eisenhardt, 1989; Sobh and Perry, 2006; Yin, 2003).

An initial *pilot study* was conducted to test the tools (Alam, 2005; Yin, 2003) and to inform the researcher as to the suitability of the data being collected. Some readjusting of the questionnaire, the interview protocol and interview technique followed the pilot. During the data collection phase the cases underwent individual case analysis (Perry, 1998) and cross case analysis which increased confidence in the results (Eisenhardt, 1989; Eisenhardt, 1991; Hubbard and Armstrong, 1994) as well as allowing the researcher to continually review the information and compare it to the research issues (Hancock and Algozzine, 2006).

Qualitative data analysis software (NVivo) was used to facilitate analysing the large quantity of data that was collected (Cepeda and Martin, 2005). This was particularly beneficial in generating the multiple themes under which the data were coded (Miles and Huberman, 1994). The research issues guided data analysis as did the existing theory (Perry, 1998) so the researcher was able to generate valuable results. The delimitations of this research are presented in the following section.

1.6 Delimitations of research

Delimitations are the “parameters” (Hancock and Algozzine, 2006 p. 75) of a study and set out the group being studied, in what settings they might be found and what aspects are being investigated. The significance of the delimitations is that they may potentially affect the generalisability of the research (Carson et al., 2001). Although case study research does not typically have statistical generalisability it is known to be generalisable to theory (Yin 2003). However, it remains important to consider the delimitations so as to understand the boundaries of this research project.

The study was conducted in Queensland, a state in Australia, so the first delimitation is *geographic*. It is possible that the findings of this study may be generalised to the rest of Australia but they may not be generalisable to other international locations. Previous studies have been conducted about work-life balance in Australia and many have been conducted in other countries while some research has crossed international borders (Hyman and Summers, 2004; Lewis et al., 2003; Hughes and Bozionelos, 2007; Straub, 2007; Burke, 2000; Towers et al., 2006; Russo and Waters, 2006; Still and Timms, 2000; Sheridan and Conway, 2001; Walker et al., 2008; Wlkinson, 2008; Peus and Traut-Mattausch, 2008). Hence, the geographic location of research tends to be a common delimitation. In addition some reviewed small business research has also been delimited geographically as it was conducted in a single country (Maxwell et al., 2007; Loscocco and Smith-Hunter, 2004; van Geldren and Jansen, 2006; Prottas, 2008). Although franchising research has been conducted in many different countries, most of the research has a single country focus (Dant, 2008). Hence it would appear again that this delimitation is not uncommon.

Subjects of the study are coffee shop owners and although they are small business owners they may not be representative of all small businesses. Thus, the second delimitation is *industry*. Whether the findings of a study based on only one industry are generalisable is uncertain, however the subjects were worthy of study as they are significant contributors to the economy in areas such as employment and income generation (ABS, 2006-07). Furthermore these businesses are found throughout Australia in both metropolitan and regional locations (ABS, 2006-07).

Business format franchising (Doherty and Quinn, 1999; Alon, 2001) is the method of franchising where the franchisor provides the franchisee with a proven system for running the business including training, support and reporting processes (Duckett, 2008). Other forms of franchising include product and trade name franchising (Falbe and Daindrige, 1992). Franchised businesses used in this study were business format franchises and as such the third delimitation is *franchise type*.

The subjects being studied are the business owners; hence the fourth delimitation is the *participants*. All the participants in this research were owner-operators and employees were excluded from the analysis. Much research has been conducted about the initiatives being undertaken by organisations to improve work-life balance for employees (Lewis, 2001; Hyman and Summers, 2004; Evans, 2000; Maxwell, et al., 2007; Eikhof et al., 2007; Kinman and Jones, 2008; Still and Timms, 2000), yet there has been very little research into the experience for business owners (Daniel, 2004; Shelton, 2006; Walker et al. 2008; Lerner and Almor, 2002). Hence, the research was delimited to *business owner-operators* (hereafter referred to as business owners).

Considering the delimitations, the research is the first study to be conducted in Australia that incorporates the multiple factors of how and why small business owners perceive their work-life balance and, furthermore, it compares the situations of franchised and independent businesses.

1.7 Definitions

Some terminology has been used that has been defined for the purpose of this thesis and the definitions will now be provided:

- Business owner – an individual who has complete or part ownership of the business being investigated and is working in the business;
- Coffee shop – a business that sells coffee as one of the main products from its product offering;
- Franchised business – business model where a franchisor provides the means by which the franchisee has the right to operate as part of a franchise network. The

franchisee is obliged to comply with the conditions as set out in the franchise agreement, that is “a continuing relationship in organising, training, merchandising and management, in return for a consideration from the franchisee” (US Department of Commerce 1994:ix in Ilan, 2001)

- Independently owned business – non-franchised businesses owned by individuals who operate independently and take full responsibility for the provision and delivery of their product or service;
- Life – what individuals do when they are not committed to a work schedule, and they can freely choose to participate in those activities;
- Small business – a business employing less than 20 people with a management structure that has independent ownership, close control by the owner/managers who contribute most of the capital, and are the principal decision makers (ABS, 2004);
- Work – paid work, that is employment from which individuals are earning an income;
- Work-life balance - a concept that deals with ability of individuals, irrespective of the age or their gender, to get into a flow that allows them to combine the demands of work and other non-work responsibilities and/or activities (Hughes and Bonzionelos, 2007).

1.8 *Outline of the thesis*

The thesis comprises five chapters with the first chapter providing an introduction to the literature that has guided the development of this research. There is an explanation of the research question, research issues, and a justification for the research in sections 1.2 and 1.3 (including the contributions to theory and managerial practice). The selected methodology is explained so as to inform the reader about its suitability to this type of research project. Consideration is given to the delimitations of the research through a discussion of the parameters of the study. Finally definitions of key terms used throughout the thesis are provided.

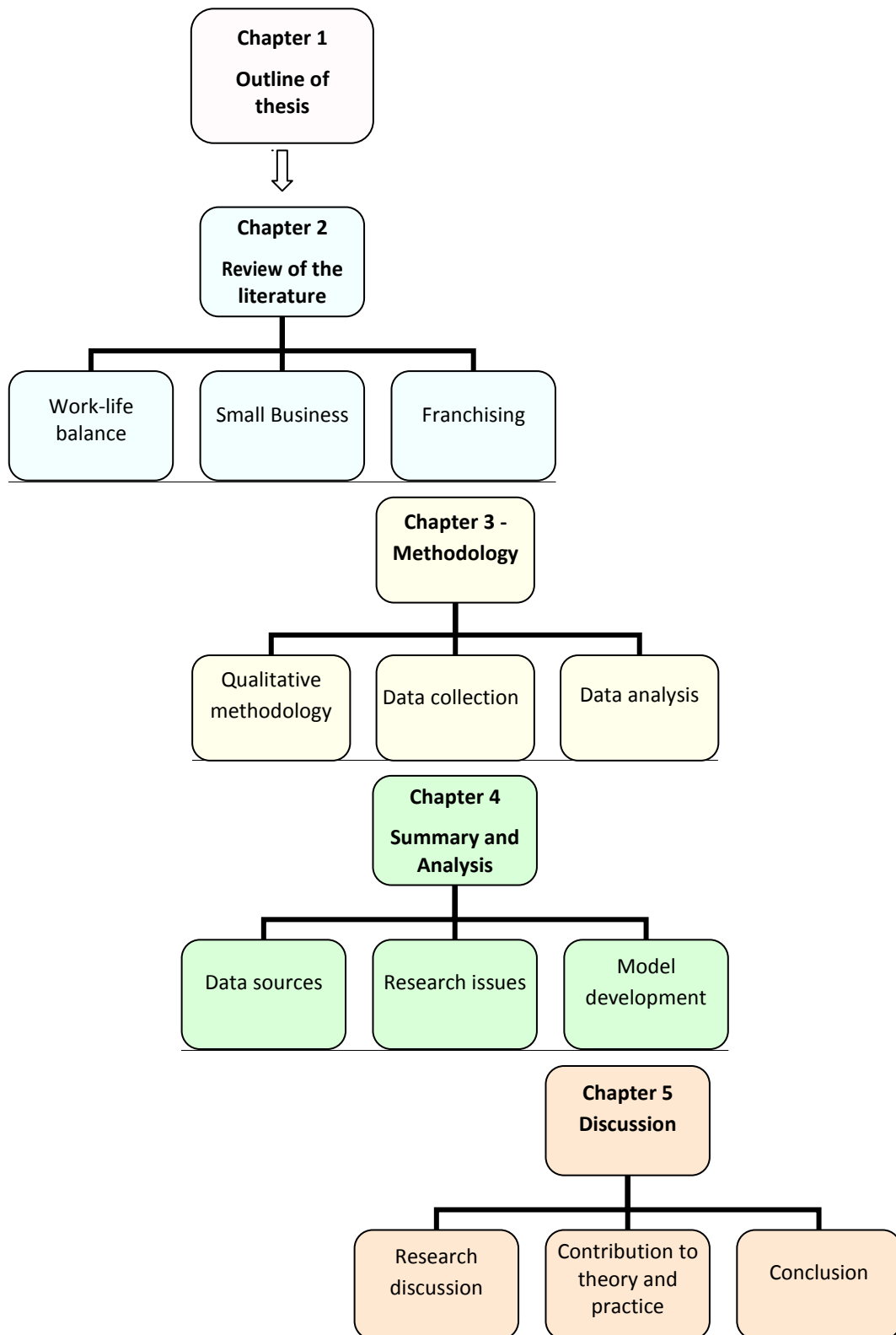
Chapter 2 outlines the literature that was reviewed to provide a foundation of knowledge for the researcher. In particular, the comprehensive literature review assists in highlighting the importance of the research topic, research question and the research issues. The three main categories of literature reviewed are work-life balance literature, small business literature and franchising literature.

Chapter 3 provides a comprehensive explanation of the qualitative research methodology and explanations of the realist paradigm and the case study methodology. Furthermore, data collection tools are discussed as well as the measures taken to ensure the reliability and validity of the research. Ethical considerations and approaches are detailed.

Chapter 4 provides a comprehensive summary and analysis of the collected data. The three different data sources are dealt with independently and concurrently so as to develop themes which are related to the research issues. Following the summarising and analysis of the data the research issues are discussed, based on the data that was collected and guided by the a priori research. Two models have been developed based on the outcomes of the prior analysis and discussion of research issues which are introduced in this chapter.

Chapter 5 is the discussion chapter in which comparisons between the outcomes of the research with the a priori theory are made. Next, an extended discussion regarding the models that have been developed (including the results from some of the participants in the initial research) are presented. The contributions to theory and management are discussed as are the conclusions and recommendations for further research. A diagram outlining the thesis is presented in Figure 1.1.

Figure 1.1 Outline of the thesis



Source: Developed for this thesis

1.9 Conclusion

This chapter has provided an outline of what will be presented in the following four chapters of this five chapter thesis. The reasons for the research, the method employed, the issues and questions to be considered and the outcomes have been outlined. The following chapters will ultimately provide the reader with some answers to the question:

“How and why does work-life balance differ between a franchised business and an independently owned (non-franchised) small business?”

The next chapter will detail the review of the literature.

Chapter 2: Review of the literature

2.1 Introduction

Research shows that individuals choose to allocate time to work and leisure varies significantly based on their own situations (Dex and Scheibl, 2001). Some feel they have a choice of how much time they must spend at work, whereas others feel compelled to put in long hours (Porter, 2004). The issue of work-life balance has been studied for over four decades (Roberts, 2007), and emerged as an important area of interest as the number of women entering the workforce increased (Lewis, 2003). The initial focus was the challenge of balancing work and family commitments (Bardoel, 2003), however, over time the impact of work spillover has been seen to be relevant for individuals who do not necessarily have family commitments (Lambert and Haley-Lock, 2004). The resulting studies cover a broad range of interests and include a variety of perspectives such as: gender based differences (Noor, 2004), the effect of stage of life on priorities with work and life (Walker and Webster, 2006), differing definitions of work and life (Lewis, 2003), policies used to enhance work-life balance (Bardoel, 2003) and the implications of making use of them, especially for men who are seen to take the 'mummy track' (Schwartz, 1989 in McDonald, Brown and Bradley, 2005 p. 42) if they want to spend time with their family.

Many other aspects will be explored in this research with particular emphasis on the *choices* that individuals make in an effort to achieve this apparently illusive balance. A review of the literature demonstrates that many individuals seek to regain some control over their lives by starting their own business (Smith, 2000; Shelton, 2006; Walker et al., 2007). The opportunity to be in control of their own outcomes seems attractive and easily attainable once they are 'their own boss'. However, this may not be the case and depends on a variety of different factors including the type of business, the skills of the owner, the financial position of the organisation, the amount and kind of

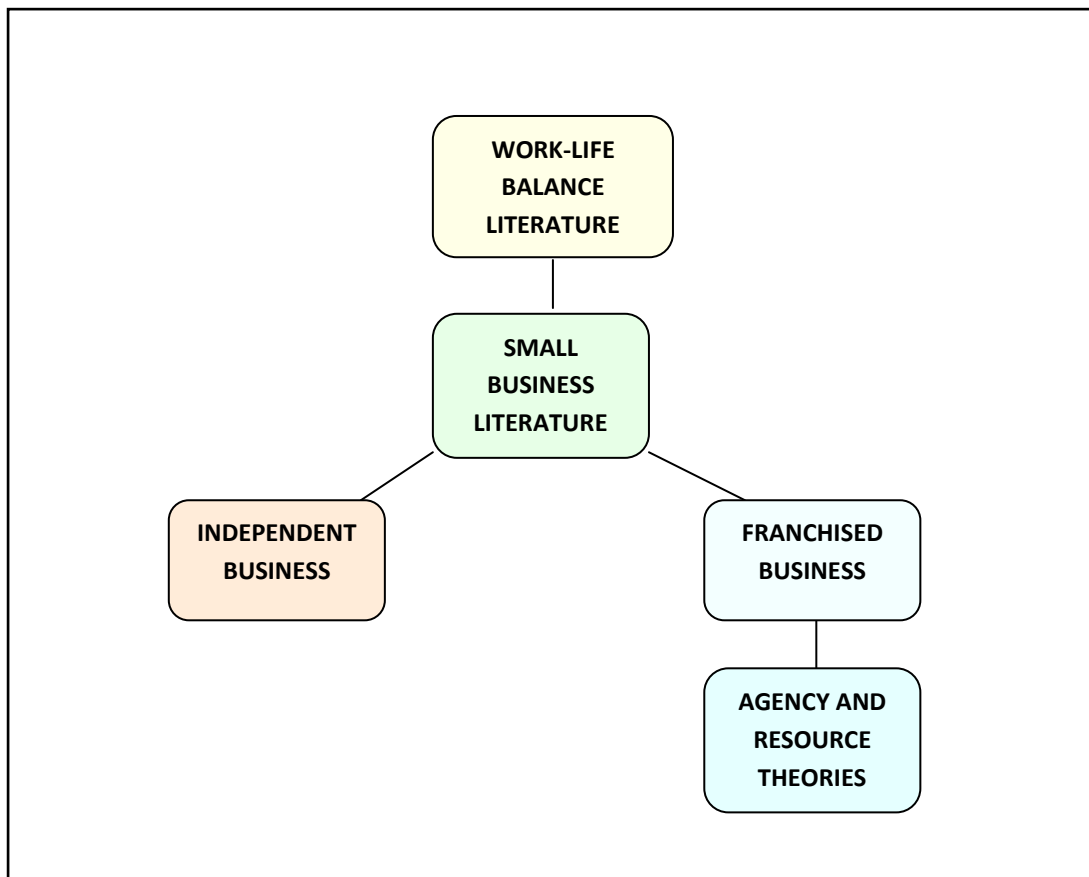
support the individual is given by the other stakeholders including family, franchisors and staff, the impact of customers, and the ability the business owner has to operate a business (Spinks, 2004; Paswan and Young, 1999; Shelton, 2006; Noor, 2004).

Governments worldwide have encouraged the creation of small businesses seen as a catalyst for economic growth. Such encouragement with these businesses has shown significant growth in the number of small businesses (Smith, 2000). The *aim* of this research is to determine whether starting a small business, either as a franchisee or independently, will give the business owner/s more or less opportunity for work-life balance. This research will focus on comparing work-life balance between independent and franchised businesses.

The research will be limited to one specific sector so as to minimise the variables affecting the data. The businesses studied are coffee shops as there is potentially a very large sample of both franchised and independently owned businesses. According to the Australian Bureau of Statistics (ABS, 2005) in June 2004 there were 13,286 café and restaurant businesses in Australia with a total income generated in the sector of \$10,129.6 million. Of these businesses, approximately 75 percent were located in metropolitan areas consistent with the current study as 70 percent of the participants were from urban locations and the remaining cases from regional areas. This sector employed 188,102 people over 50 percent of whom were casual workers. Hence it is a sector worthy of investigation. For the purpose of this study a business will be considered a coffee shop if coffee is one of the main products the business sells amongst its product offering.

This chapter will review the literature regarding work-life balance and the way these interact. It will also review the literature about small business models with particular emphasis on franchised and independently owned small business, and the owners of these businesses. This is the gap in the literature on work-life balance as previous research focuses on large organisations. Given the fact that there are over 1.8 million small businesses in Australia (ABS, 2007), small business is a very significant component of the economy. This review will establish the key factors needed for the framework within which the study will be conducted.

Figure 2.1 Outline of structure of review of the literature



Source: Developed for this research

2.2 Work-life balance

Following an examination of the literature it is apparent there are various views of what people perceive as work and life, hence this section will discuss these concepts and define them for the purpose of this research. Furthermore there will be a discussion of the many aspects of work-life balance including its emergence as a situational concept that arose due to changing circumstances, through to an issue of management that organisations needed to address. For instance associated gender issues and different generational perceptions have also started to emerge as key factors requiring consideration. The concept of *work-life balance* requires definitions of work and life to ensure clarity around which boundaries may be drawn.

2.2.1 What is work?

The definition of work can be as narrow as paid employment or as broad as any activity that involves effort. Porter (2004) suggests that “the meaning of work has varied across time and culture - a curse, a calling, a social obligation, a natural activity, a means to a better life or simply what we do because we have to” (Porter, 2004 p. 425). The variety of meanings expressed demonstrates how individual the concept of work is, and that it is strongly influenced by the experiences of those defining it. The definition can be broad and inclusive as it recognises the wide variety of work situations that may be encountered.

In particular, Lewis (2003) suggests that “work is often defined in terms of obligated time, whether paid or unpaid” (p. 344). This definition incorporates the multiplicity of activities that people may consider are work related. It includes the time one spends going out to paid employment, participating in volunteer activities, to the time spent performing household duties or obtaining an education. Although it is clear there are many activities that can be classified as work which do not involve an individual being paid, for the purpose of this research, work will be understood to mean *paid* work, as that provides a certain amount of clarity when distinguishing ‘life’ activities. The benefit of using this narrow definition of work is that it will ensure the

subjects interviewed in this study will be able to clearly differentiate work and life issues.

Individual perceptions about work will ultimately influence whether it is viewed from a positive or negative perspective and whether this view will lead to positive or negative outcomes for the organisations (Douglas and Morris, 2006). There tends to be an underlying assumption expressed in some of the literature that work is something the individual is compelled to undertake in order to earn an income, and that it is more or less an intrusion into the activities in which he/she would much prefer to participate (Eikhof, et al., 2007). It is this type of perception that leads to a negative view of what work means in people's lives and can also lead to feelings of dissatisfaction and frustration which in turn leads to a loss of productivity. Issues such as organisational design or work intensification (Savery and Luks, 2000), can also put more pressure and stress on employees.

On the other hand there is research that shows that work is a very *positive* activity in the lives of many individuals. According to Eikhof et al. (2007), rather than being an intrusion, work can be a source of self-fulfillment and satisfaction. People are able to come to work where there is a sense of purpose and clarity about what they are aiming to achieve; there is a structure around what they are doing, and there are often clearly defined goals against which they can measure their performance and therefore be clear about what they have achieved.

One study conducted in the United Kingdom revealed that over 60 percent of men and women are actually very satisfied with their work situations and about 2.4 million workers prefer work to home (Isles, 2004 in Eikhof et al., 2007) indicating that work can provide a sense of purpose and happiness in peoples' lives. Furthermore it could be suggested that the enjoyment of work has very positive outcomes, as more motivated employees are less likely to suffer from stress induced conditions potentially leading to problems like absenteeism (Burke, 2000). This attitude will affect the way people view the amount of time spent on work as opposed to the time they have available for what could be considered 'life activities'.

2.2.2 *What is life?*

The technological revolution was supposed to bring us increased time for leisure (Lewis, 2003) and provide opportunities for individuals to pursue activities that gave them variety in their lives. In fact, people are working *longer* hours than pre-industrial revolution workers (Evans, 2000).

Throughout history there have been changes in the way individuals allocate their time, because the days were more defined in terms of required activities. Typically, from the 1950's until the advent of more accommodating technology, workers would travel to the actual place of employment, carry out their work requirements, and at the end of the day return to their place of residence and undertake other duties or activities (Connell, 2005). This might have involved playing a sport, engaging in study or having dinner with the family or even the extended family. The weekend was a time when, unless employment required shift work, the individual participated in what would be seen as leisure activities or family time (Towers et al., 2006). There was a clear distinction between 'work' and 'life'.

With the introduction of technology and labour saving devices it has become more difficult to distinguish between the two concepts (Lewis et al., 2003). The options these technological advances provide, have made it more of a challenge to determine how we define a leisure activity. For the purposes of this research leisure can be considered from two different perspectives. Firstly, there is the unallocated time we have for the activities we freely choose to do, and then there is the time we spend doing the activities we associate with enjoyment (Lewis, 2003). Thus in terms of this definition, the *life* component of work-life balance is 'what we do when we are not committed to a work schedule and when we freely choose to participate in those activities'.

For some the plethora of choices we have to spend our time when we are not working, include looking after family, enjoying a hobby, pursuing the many options for ongoing education or seeking out opportunities to travel. The choices are also expanded due to the vast number of entertainment options, surfing the readily available information on the internet and communicating using the many new and instantaneous

methods available, leading people to seek out the time to spend on these activities. Thus, individuals need to take the opportunity to make choices about how we allocate the time available to maximise satisfaction from 'life'. This broad and inclusive view of leisure serves to provide a distinction from the work definition minimising ambiguity in the research. The concept of work-life balance is discussed below.

2.2.3 What is work-life balance?

Work-life balance is a concept that deals with the ability of individuals, irrespective of the age or their gender, to get 'into a flow' that allows them to combine the demands of work and other non-work responsibilities and/or activities (Hughes and Bonzionelos, 2007). How this concept came into being and why it is an area of interest will be explored.

2.2.3.1 Emerging concept

Much research has been conducted about work-life or work-family balance as it has become an increasingly important issue for both individuals and organisations (Ezzedeen, 2004; Ahmad, 2003; Noor, 2004). There are three significant approaches to the way this concept has been researched. Firstly there is the *company focused approach* to work-life balance (Rayman, Baylin, Dickert and Carre, 1999; Dex and Scheible, 2001). This involves work being central to what one does in life, and therefore how a company can make it easier for individuals to ensure the work is done. Secondly there is the more *family centric theme* (Lewis et al., 2003; Keene and Quadango, 2004) which focuses on the provision of policies that allow individuals to incorporate the needs of their families while achieving the necessary work requirements. Although this research seems to be more 'family' or 'life' focused, the main aim seems to remain work-centric. The third theme is more about a *quality of life approach* (Shelton, 2006, Walker et al., 2008; Loscocco and Smith-Hunter, 2004) and involves discussion about making life choices such as downshifting (decreasing work commitments and simplifying lifestyle), or incorporating other activities such as community work, to regain balance. The following review of the literature includes these themes as they have emerged over the past few decades of research.

The *challenge* of work-life balance has been a phenomenon for many years (Spinks, 2004). Stemming from the time when women entered the workforce in large numbers during World War II, it was essential for these women to manage both the role of employee and homemaker whilst the men were away fighting (Roberts, 2007). Although this was recognised as an issue for these employees it was not considered significant enough to warrant any attempt to rectify it. There was some investigation in the following decade into shift work and challenging work hours not specifically work-life balance (Roberts, 2007).

During this time there was a clear definition of the *roles* men and women played in society and how they spent their time (Towers et al., 2006). Women were responsible for the home and men were responsible for earning the family income. This distinction allowed people to allocate their priorities clearly as there were no competing demands from the boss and the family. As time progressed and roles started to become less distinct, individuals started to take on different levels of responsibility in both work and family domains, thus creating a tension between competing demands (Connell, 2005).

The Baby Boomers started entering the workforce in the 1960s and increased the numbers in the labour market significantly. Known as the 'world's largest cohort' (Westerman and Yamamura, 2007p. 152) due to their numbers, they made an impact on businesses, society and the economy. They also had to *compete* for jobs and were willing to put in significant hours as employers recognised this willingness. Furthermore, they liked to consume and required a good income to maintain their level of consumption thus working long hours and sacrificing leisure time (Roberts, 2007; Walker and Webster, 2007). New trends in work organisation included increased participation by women in the workforce, skills shortages, intensified workloads and down-sizing (Lewis, 2001).

Company focused approach

These changes in society impacted on business and work organisation and hence work-life balance has become a matter of organisational concern over the last few decades. The main impetus for the focus on this issue was the need for recruitment and

retention of employees (Lewis, 2003; Wise and Bond, 2003). Organisations faced unacceptable levels of staff turnover as employees found it difficult to manage the demands of work and family resulting from the changing attitudes to work and life (Hill, Hawkins, Ferris and Weitzman, 2001). The main emphasis of the work-life balance interest in the early stages of policy development was the *company focused approach*. This “business case” (Tomlinson, 2004 p. 413) requirement of work-life balance for an organisation (for example attracting and retaining staff), created a need within organisations to accommodate the employees’ needs, however the focus was on improved company performance (Sheridan and Conway, 2001).

Research has shown some workers are increasing their hours significantly. This can be to the detriment to themselves and the organisation (Savery and Luks, 2000) as productivity can be adversely affected due to stress induced illness and such factors as absenteeism, tardiness and accidents in the workplace (Posig and Kickul, 2004). The extreme of overworking has been identified in Japan where the term ‘*karoshi*’ has been created to describe a person who dies of overwork (Savery and Luks, 2000 p.307). People who have fallen to this condition were working an average of 3,000-3,500 hours per year. Official estimates cite as many as 10,000 people may succumb to ‘*karoshi*’ each year (DoRosario, 1991). Research conducted in different geographies, shows results are similar in Europe, Canada and Australia (ABS, 2006; Towers et al., 2006).

Research has suggested that employees in the UK have the longest working hours in Europe but have the lowest productivity (Hughes, 2007). Other research (Roberts, 2007) shows that the UK and Europe over the last 30 years have not significantly increased the actual hours worked, but, due to work intensification, employees have a sense of being put under enormous time pressure with UK employees exhibiting higher stress levels than those on the Continent (Hughes, 2007). It may be that employees tend to perceive hours are increased due to the fact that they no longer take lunch or tea breaks, rather they sit at their desks and work through (Roberts, 2007). An alternative view is that working hours have increased for certain workers but not for others (Towers et al., 2006).

It has been proposed that some workers have more hours than they want whereas others might be underemployed (Lambert and Hayley-Lock, 2004). There has been a growth of part-time and casual work (Sheridan and Conway, 2001; Walker et al., 2008) which has provided flexibility for those who want to work under those conditions, but it may be problematic for those seeking a greater number of hours. According to the Australian Bureau of Statistics (2006) the growth in part-time work for men between 1985 and 2005 has been from 6 percent to 15 percent of the workforce, and for women it has grown from 37 to 46 percent.

The statistics show that there has been a decline in the average weekly hours worked by Australians over the last two decades. The Bureau attributes the decline to the increased reliance on part-time employees. Thus, it could be assumed that if there has been a slight decrease in the average number of hours worked and an increase in the number of part-time employees then there would be employees working full-time who are working increased hours to keep the average high. This reinforces the findings in the UK, Europe (Roberts, 2007) and Canada (Towers et al., 2006) that some individuals are working many more hours whilst others are underemployed.

Family centric approach

Increasing awareness of the above trends led organisations to recognise they were facing new challenges managing their workforces. This encouraged them to introduce what are known as ‘family friendly policies’, designed with the intention of assisting employees to create some balance between their work and family lives (Bardoel, 2003). Many of these policies were aimed at increasing flexibility for the employee (Maxwell et al., 2007), allowing for the performance of work in a variety of settings such as home offices, or for work hours to be scheduled for when it best suited other demands such as attending to children’s schedules (Lewis, 2003; Bardoel, 2003). Initially the emphasis was on providing the opportunity for women to be able to manage the competing demands of family and work, as women bore, and continue to bear the primary responsibility for child rearing (Hacker and Doolen, 2003; Daniel, 2004; Eikhof et al., 2007; Connell, 2005; Dex and Scheibl, 2001). This emphasis on work-family balance was potentially discriminatory as it seemed to favour those employees with children

who were able to take advantage of ‘family friendly’ policies such as carer’s leave, but disadvantaged those without families who did not have reason to access these benefits (Lambert and Haley-Lock, 2004; Wise and Bond, 2003). These policies were typical of the *family centric themed* initiatives. The aim was to keep the employee productive whilst accommodating the needs of the family.

Quality of life approach

Through recognition of the possibility the ‘work-family’ policies could be exclusive, the concept of ‘work-life’ emerged in the 1990s. This was a term that was more inclusive and gender neutral. It included the needs of men, women, those with or without family responsibilities, and those who wanted to be involved in activities beyond the limits of the workplace (Lewis, 2003). Hughes and Bozionelos (2007) point out that men also experience issues with work-life balance, not necessarily because they want to spend time on family matters but because they have hobbies, sports or friends that require their time.

It could be said that work-life balance policies tend to be based on the assumptions and perceptions that work has a negative connotation and the demands of it are an imposition (van Emmerick and Saunders, 2005), whereas life is something that is associated with caring and has a positive feel (Eikhof et al., 2007). Hence, associated policies are aimed at providing the employee with the opportunity to spend less time at work and more time at life.

2.2.3.2 Types of policies used to improve work-life balance

A variety of approaches have been implemented by organisations with a view to improving work-life balance for employees. Generally they have addressed the issue of time and space in that they allow workers to change the times they work, or they provide alternative workplaces through the introduction of what Towers et al. (2006) refer to as “work extending technology (WET)” (p. 594). This technology includes laptop computers, mobile phones, fax machines, scanners and Blackberry devices. The development of these tools has meant that workers can now take work away from the

office and operate from a remote location, thus providing flexibility in the place of work (Maxwell et al., 2007, Lewis et al., 2003, Towers et al., 2006). The option of flexibility in time has also occurred as a result of this technology, allowing people to work at different times to the normal 'hours of operation' with the aim of contributing to the employee's work-life balance (Russo and Waters, 2006).

Some organisations, such as Australian public service employers, provide flexitime which means the employee can perform to a varied work schedule (Maxwell, et al., 2007,). It also allows for a range of starting and leaving times as long as they complete the required number of hours per week. They are even able to build up hours so they can have what is known as a rostered day off (RDO) enabling them to spend time attending to life activities.

Some other policies that have been implemented include job sharing programs, part-time work, working from home options, assistance with child care and elderly care, compressed work weeks and different forms of leave such as carer's leave (Lewis, 2001). Clearly these address the issue of when and where the work is done. Ultimately the aim is to help the organisation attract and retain staff at a time when this appears to be a difficult task due to low unemployment and decreased organisational loyalty (Wise and Bond, 2003).

Four flexible work practices have been identified by Blyton (1991): task, numerical, temporal, and wage flexibility. Task flexibility allows for individuals to be engaged across a variety of tasks using practices such as job rotation programs or multi-skilling. Numerical flexibility provides for readily adjustable numbers within the workforce employing strategies such as temporary staff (contractors, relief and casual workers) to supplement the regular workforce at times of high demand. Temporal flexibility includes the use of varied work patterns through the provision of policies like telecommuting. Finally wage flexibility includes initiatives in which individuals can be rewarded on a pay for performance basis. Although these practices are not formal work-life balance policies they provide a basis from which organisations can design programs. Perhaps consideration of these aspects in policy development might lead to practices that will achieve commitment from all members of the organisation. This would be

beneficial as one of the barriers to success in this area is lack of uptake or support of the opportunities available to employees (Peus and Traut-Mattausch, 2008).

2.2.3.3 Access to policies

One of the limitations of these family friendly or work-life balance policies is that although they may be part of company policy there may be consequences for the individual who takes advantage of them (Lewis, et al., 2003). It is essential to not only have the policies, but also to have a work environment which is accommodating of its employees' work family needs (Bardoel, 2003) and is accepting of the fact that individuals have a multiplicity of roles including being a person with family responsibilities. Organisational policy can clearly be supportive of work-life balance initiatives but there can be a *culture* that is decidedly unsupportive (Clutterbuck, 2004). There can be initial resistance from employees who feel they do not have the opportunity to access these policies as they do not have family demands and they feel their workloads being adversely affected (Wise and Bond, 2003). When there is this kind of tension between co-workers it can make the workplace very unpleasant and the resultant conflict can be counterproductive (Lambert and Haley-Lock, 2004).

This type of imbalance should not occur in the workplace and policies should be beneficial to all employees, therefore minimising any negative impacts. According to Lewis (2001) it would appear that rather than the policies discriminating against the individuals without families, they in fact have been designed for the core workforce in organisations and have limited benefit for many contract or temporary workers. According to Evans (2000) one of the concerns about the development of flexible working policies is the flexibility introduced to meet the needs of the organisation be consistent and supportive of the needs of the individual. Furthermore the implementation of policies to encourage part-time work and allow employees (usually women) to attend to family matters tends to marginalise these workers (Sheridan and Conway, 2001; van Emmerick and Saunders, 2005). This occurs because research has shown a lesser chance of career advancement for part-time than for full-time employees, so taking advantage of these innovative and supportive policies can be career limiting (Tomlinson, 2004; Wise and Bond, 2003).

Knowledge of what policies are available has been cited as another reason why employees do not avail themselves of opportunities. This problem arises because sometimes line managers are also not *aware* of what is available so they are unable to fully inform their staff (Wise and Bond, 2003). It is important for the organisation to fully inform all employees of their benefits and if the culture of the organisation is supportive of work-life balance it would be reasonable to expect this to happen.

Management also has an ability to greatly *influence* whether employees are comfortable to take up the opportunity to enhance work-family balance in their lives (Tomlinson, 2004; Maxwell et al., 2007). According to Bardoel (2003), managers are actors who are not only able to put these policies in place but are able to provide an environment which is encouraging and accommodating for a 'work-family friendly' workplace. Medved (2004) explains that sometimes mixed messages are sent about the access to, and use of work-life balance entitlements, thus leaving it up to the individual manager to make a decision about entitlements. It is one thing to have policies but if the organisation's culture is not supportive of the changes, the implementation is not going to be effective and employees will fear the negative impact on their careers (Lewis, 2003; Tomlinson, 2004; Clutterbuck, 2004). Thus, managers can be positive and promote the culture of 'family-friendly' workplaces, or they can be unsupportive and create an environment where the employee may feel insecure and be preoccupied with the demands of work, even if they are attending to the needs of family (Posig and Kickul, 2004).

The challenge is providing organisations with the correct incentive to pursue these types of policies. This is more likely to happen if organisations see a benefit on the bottom line as a result of the decreased staff turnover that they initially sought (Rayman et al., 1999). Furthermore, organisations may benefit if work-life balance policies can be shown to improve staff morale and motivation, which can reduce turnover and will ultimately also improve profitability (Burke, 2000; Lewis, et al., 2003), and/or also lead to an increase in employee career and life satisfaction within organisations (Burke, 2000).

What emerges from the above discussion is there are significant gender issues associated with this concept and they will now be discussed. The negative impact on careers can be a great disincentive to take up the benefits of the policies in place and it is very important for the culture of the organisation to be supportive (Clutterbuck, 2004). The perception of how supportive the organisation is may be subject to gender based differences. In some situations women perceive there is a less than positive view of employees using work-life balance initiatives, whereas men in the same organisation do not have that feeling (Wise and Bond, 2003).

2.2.3.4 Gender issues

One focus of study on work-family balance is the impact work can have on family, or conversely, the impact family can have on work. Hence, it is the spillover of one set of priorities into another (Hill et al. 2001). These viewpoints are often *gender* based with females facing conflict because of work-interfering-with-family and men having to deal with family-interfering-with-work issues (Noor, 2004). This gender-based difference stems from where individuals see their primary responsibilities. Even though women are supposed to have equality in the workplace, most people see the work role for women as supplementary to the primary role of parenting (Connell, 2005); therefore it is acceptable for family demands to intrude into work (Noor, 2004). It is viewed as acceptable for women to take advantage of family friendly policies for the purposes of work-life balance (Marcinkus Whelan-Berry and Gordon, 2007). Added conflict arises for women as they manage this balancing act, because they see each of their various roles as salient (Ahmad, 2003), and therefore find it difficult to favour one demand over the other.

Initially the *focus* of work-life balance policies was on providing women with the opportunity to manage the demands of the family whilst continuing to be employed, hence the name work-family balance (Dex and Scheible, 2001; Lewis, 2001). These policies resulted in reinforcing the perception that women take on employment as a supplementary activity to their primary role. Consequently, part-time jobs in organisations tend to be predominantly filled by women (Wise and Bond 2003; ABS, 2005) with this becoming a self-fulfilling outcome due to the lack of a career path for

part-time employees. Wise and Bond (2003) also found that by making use of work-life balance policies, women were perceived to be damaging their careers, as they were not showing sufficient commitment to the organisation.

Providing that the aim of these policies is to recruit and retain good employees then the policies need to address the needs of all people and allow them the same pathway. Women seem to know that the choice between work and family is a foregone conclusion. They are working in a society that permits them to work but does not necessarily facilitate a career path (Hall, 1990). Many women opt for part-time work in an attempt to provide themselves with enough time to accommodate the multiplicity of demands they face (Sheridan and Conway, 2001). Part-time work is self limiting in terms of career because most of the advancement opportunities are only available to full-time employees (McDonald et al., 2005; Tomlinson, 2004). The pressure on women to have a great career, well adapted children, and a successful marriage, creates a balancing act that would overwhelm anybody. Daniel (2004) cites the issue of male stereotyping in the workplace, where men believe that women should be at home looking after the children. In particular, the perception in society reaffirms this is where women truly belong, which makes it a significant factor contributing to women leaving corporate environments.

Research has also shown that if an organisation has a culture that expects managers to work long hours, then the inability of women meet these demands will ultimately eliminate them from these jobs as they tend to be unable to fulfill such requirements due to work-family conflict (Lewis, 2001; Posig and Kickul, 2004). This role conflict has led to many women leaving the corporate environment (Walker et al., 2008; Shelton, 2006). Although it is this issue that the work-life balance initiatives are supposed to address, the evidence is that they are not always effective.

As women have adopted more senior positions with greater responsibility, or have decided to pursue the entrepreneurial route and open their own businesses, they still tend to bear the primary responsibility for child rearing (Daniel, 2004), thus facing enormous challenges in finding work-life balance. Research reinforces this perception by suggesting organisations implement programs that firstly assist the “needs of specific

groups of employees e.g. women with children” (Hacker and Doolen, 2003 p. 284) thus creating the impression that children are the women’s responsibility rather than the men’s.

This can be a challenge for men too, as they seek to change the way they approach the demands of work in their lives. According to Ezzedeen (2004) men are supposed to demonstrate the male stereotypical traits of ‘commitment’ and ‘competence’. These traits ensure the man works full time, long hours and is willing to work outside regular work schedules. The family friendly policies that organisations introduce generally facilitate activities that tend to be seen as a ‘women’s responsibility’ such as family care programs, and flexible work arrangements (Maxwell, et al., 2007; Hacker and Doolen, 2003) so that the children can be taken to and from school. Men, on the other hand, are expected to work long hours that demonstrates to the organisation that they are committed and worthy of promotion into managerial roles which also demand these excesses (Posig and Kickul, 2004; Wise and Bond, 2003). Men are less often employed on a part-time basis as they are seen as the bread winners in the family (Lewis, 2001).

Some research has been conducted by Burke (2000) into the specific area of *men*, and how they might benefit from these balance initiatives. This is important research as it shows that men actually perform well if they are able to work fewer hours and have less job stress, as this leads to greater job and career satisfaction, a lower likelihood of leaving the job and greater satisfaction with life outside of work too. The adoption of work-life balance initiatives has benefits for the organisation in terms of lower staff turnover, better well-being of its employees and potentially, improved productivity (Evans, 2000). This provides a solution to other research which shows organisations have recognised a problem with increased working hours (Burke, 2000; Porter, 2004). Individuals can become stressed by the spillover of work into life or life into work responsibilities (Noor, 2004; Hill et al., 2001), hence, encouraging staff to take advantage of these policies could have long term benefits to the organisation.

So overall there are gender differences in the way these situations are managed (Still and Timms, 2000; Ahmad, 2003; Noor, 2004; Hill et al., 2001) and how

organisations perceive the individuals who benefit from the use of the policies. The challenges of different views of work-life balance based on gender can be further complicated when the expectations of different generations are taken into consideration, as discussed in the following section.

2.2.4 Generational views on work-life balance

A generation is a group of people that share a range of time during which the members were born and there are shared experiences that influence the way the group behaves (Kupperschmidt, 2000). The Baby Boomers were born between 1945 and 1962 as the world was recovering from war and was now experiencing a time of renewed optimism. Generation X followed between 1963 and 1982 which was a time of change in the family structure and work design (Sirias et al., 2007). Generation Y were born between 1978 and 1988 (Martin, 2005), which was a time of increased reliance on technology and of instant reward. These generational differences impact the way the members approach work. As the Baby Boomers age and the workforce is being filled with Generation 'X' and 'Y', organisations are starting to see a different *attitude* to work (Westerman and Yamamura, 2007). These younger generations are much smaller in number and their attitude to work is less competitive, thus creating a shift in employee management.

As the Baby Boomers, who are known to be optimistic and competitive (Leschinsky and Michael, 2004), were a very large generation when they entered the workforce, they increased the number of resources in the labour market. As there were enough people, in many cases more than enough people, to fill the number of jobs available, the boomers' had to compete against each other for employment and advancement (Westerman and Yamamura, 2006). Therefore they were willing to work long hours and not demand many additional conditions from their employers. Many of the Baby Boomers experienced redundancy as organisations downsized and they faced unemployment lines and uncertainty when they had no work (Teicher, Holland and Gough 2002). The introduction of many forms of technology throughout the 1980s and 1990s (Lewis et al., 2003, Towers et al., 2006) meant that organisations were able to replace employees with machines, such as automatic teller machines. This technology did not require working conditions as do employees which meant the Boomers' were

not only competing amongst themselves, but also with new equipment that could replace them. This also increased employment competition.

Furthermore, employees who wanted to *advance* through the organisation recognised that working long hours was required by management, so they arrived early and left late (Eikhof et al., 2007; Lewis, 2001). This has given rise to the concept of presenteeism (MacGregor, Cunningham and Caverley, 2008; Savery and Luks, 2000) with employees being present at the office when they really should not be. They are either there because they feel the workplace cannot function without them or they need to be seen to be there (competitive presenteeism). The problem with this situation is that employees may not be working effectively, they are just there to be seen. Ultimately this practice is disadvantageous to both the employee and the organisation as productivity is adversely affected.

In summary, the Baby Boomers worked hard, undertaking long hours and competing in the workforce with each other for job opportunities and advancement. In the early stages of the careers of many members of this generation the concept of work-life balance was not considered important, the focus was on working and earning money to consume.

The Baby Boomer generation was loyal to the organisation, believing in team work and consensus decision making and many now hold senior management positions of organisations (Sirias, et al., 2007). As this generation ages and begins to retire, the next generations, Generation 'X' and Generation 'Y' are commencing their careers (Westerman and Yamamuram, 2007). They are much smaller in number and are very different employees with very different attitudes to work. Due to these generational differences it has become a desire of organisations to retain as many of the older and more experienced Baby Boomers and, hence, there is a great need to focus on the lifestyle as well as career for these employees (Brown, 2004).

The typical features of Generation 'X' and Generation 'Y', also known as the "Baby Busters" (Sirias et al., 2007 p 750) require the organisation to focus on work-life balance. They are different to the previous generation as they have been raised in

different circumstances. Many Generation 'X'ers were 'latch key' children and children of dual income families, and many experienced the divorce of their parents (Glass, 2007). As a result of being left to fend for themselves they have become very self-reliant (Martin, 2005). They tend to be more individualistic than collectivist (Sirias et al., 2007) and view their career as attached to themselves and the skills they bring to the market. In addition they view their work in terms of one project after the other, rather than an ongoing long-term retention at any one place so when they say they are giving a long-term commitment they generally mean about one year (Martin, 2005).

Members of generation 'Y' are highly skilled with technology as they have grown up in an era of electronic games, computers, automatic teller machines, mobile phones, and the internet and are more than capable at multi-tasking as they watch TV, talk on instant messenger and text on the mobile phone (Kupperschmidt, 2000). Most of this technology has provided instantaneous gratification and they tend to want this in the workplace as well. As such, it has become important for supervisors to give positive feedback almost daily to keep them happy (Glass, 2007).

With respect to work-life balance Generation 'X' and 'Y' are very interested in having a life outside of work, something they think the Baby Boomers did not seek (Glass, 2007). Understandably, their experience of being latch key children and having parents that worked long hours, has led to the conclusion that the Boomers were not focused on lifestyle so much as working. The challenge for organisations is to provide them with a work environment they feel is both interesting and rewarding as well as providing the opportunity to have a life. Failing this they become easily dissatisfied and leave for other opportunities (Westerman and Yamamura, 2006).

Due to the co-existence of different generational cohorts in today's workforce management is presented with new challenges particularly when designing work practices focused on work-life balance policies in organisations. In order to retain Baby Boomers in the workforce, working conditions need to be more rewarding, and employees need to be able to experience not only work satisfaction but also life satisfaction (Marcinkus et al., 2007). Furthermore, with the arrival of Generation 'X' and 'Y' in the labour market and the different attitude they bring to work, pressure is on

organisations to provide working conditions where employees feel they have the chance to not only work, but to live.

What is important to consider at this juncture is whether there has been a noticeable blurring of boundaries between work and life, consistent with observable changes in work practices and societies as a whole.

2.3 *Blurring the boundaries*

The term work-life balance indicates that there is a *distinction* between the two concepts. Work is defined as an activity undertaken due to obligation, and leisure is any activity which is freely chosen (Lewis, 2003). Based on these explanations it would appear that the distinction of work from life would be easy. However, due to many recent changes in technology and work design, the boundaries are becoming blurred. The idea that we can easily categorise and separate activities (Ezzedeen, 2004) is quite common, however in reality this process would be problematic. It is apparent that when thinking about the boundaries between work and life, the boundary is imagined and there is no physical line that differentiates the two (Lewis, 2003). In fact with the introduction of many new technologies this boundary is not only impossible to see, but it has become extremely difficult to imagine.

Historically the distinction between work and life could be made simply because it was not possible to conduct work anywhere but in the office that was designed for that purpose, however this limitation no longer exists for office work (Towers et al., 2006). Although many tasks can now be done remotely, such as paying staff by internet banking, placing orders over the phone, or completing the accounts on the laptop, for many other jobs, tasks still need to be conducted at the place of work as in a restaurant.

Organisations are able to use a variety of initiatives (Lewis, 2001) aimed at improving work-life balance and improving organisational performance. These initiatives have come into focus because studies have shown, and organisations are recognising, the business case (Tomlinson, 2004) and the positive link between issues that affect an

employees' work-life balance and bottom line outcomes. The research conducted by Rayman, et al., (1999) showed a positive outcome between quality of life outcomes and business outcomes. Needless to say, organisations are driven by improved business outcomes, so this would encourage management to promote ongoing lifestyle initiatives.

The reality of flexibility introduced by firms is that it may be of benefit to the firm but not to the individual (Tomlinson, 2004; Sheridan and Conway, 2001; Evans, 2000, Lewis, 2003). Thus, the express purpose of *policies* aimed at improving work-life balance may not be a reality (McDonald et al., 2005). Studies have been conducted to evaluate the benefit of some of the work-life balance practices used by organisations such as the virtual office used by IBM involving the use of technology to have employees work from home in a virtual office (Hill et al., 1998). The employees were given laptop computers, fax machines and mobile phones, and were able to telecommute. This provided employees with the opportunity to work from home, thus saving the organisation money due to the reduced need for expensive office space. Although the benefit of increased flexibility was realised, the downside was not being able to separate work and personal time. There was no differentiation of the work time and space, and the life time and space, which proved difficult in a family setting (Hill et al., 1998).

Towers et al. (2006) examined the *benefits* to both organisations and employees of the introduction of work-extending technology. They found that workers are spending more hours working because they now work in the evenings, on the weekend and even when on holidays. The outcome of this practice is that the organisation is able to intrude into what might previously have been life time (Lewis, 2003). A time when people would have pursued personal endeavours, has now become time that can be given over to the organisation. However, there were distinct benefits to working from home, including the opportunity for individuals to perform overtime at home, the ability to multitask and attend to family needs whilst dealing with work issues, and it helped with work-life balance.

One of Towers et al.'s (2006) observations is that as we have progressed we have actually started to continue to almost complete the circle. That is, prior to the

industrial revolution, people worked in cottage industries, and there was little separation between work and life. With the advent of machines and factories many people took the work away from the home and it became a separated activity. With the newer technology now available to organisations it has once again become possible for work to be done in the home. This advance has returned us to “capitalism’s roots” (Towers et al., 2006 p. 597) and the boundaries are blurring yet again.

Many of the management initiatives used today are giving employees opportunities to *increase* blurring of the boundaries. For example the introduction of the virtual office has the potential to blur the boundary between work and life, as it becomes necessary to practice self discipline when deciding when to start and stop work (Lewis, 2003). For a person who has a tendency to workaholism this could be disastrous. According to Hill (1995) “...giving a workaholic an electronic briefcase may in some ways be like giving an alcoholic a bottle of gin” (p. 2). The ease of accessing the work and the lack of predetermined work times increases the likelihood of work taking priority over all other activities.

Whether it is valid to say that working these extended hours and being totally focused on work is a clear indication of workaholism (Burke, 2000a) is a point for discussion. Workaholics are perceived as the hardest workers of all, and they can either put in enormous effort or hours which ultimately contribute to the organisation (Douglas and Morris, 2006). A workaholic may actually be working for a variety of other reasons, which might include the fact that they derive a sense of identity from work, or they have a desire to consume, they need to provide financially for their family or future, or they enjoy the work (Porter, 2004). What is clear is that if one is driven to work excessively, then by providing opportunities for them to work more rather than to take leisure time, then they most likely will work. Thus, policies that might be perceived as work-life balance facilitating policies could actually encourage a greater imbalance in the workaholic (Russo and Waters, 2006)

The emergence of new work practices and the global marketplace may be viewed as an *opportunity* for individuals who choose to spend their time on work related activities. The realisation that some individuals actually want their leisure time filled by

work related activities leads one to ask if work is becoming the new leisure (Lewis, 2003). Are the boundaries blurring to the extent that not only is the time and place for work blending, but also the activities that people consider work or leisure activities?

The previous discussion differentiated work and leisure by the issue of payment and how we choose to spend our time. Hence, if one chooses in the evening to sit and watch television, is that called leisure, but if the choice made is to sit and answer emails- is that work? Lewis (2003) suggests that this blurring of the boundaries further complicates the situation when trying to define work-life balance. This discussion also lends support to the contention that work is somewhat of an intrusion into life, and that there is a need to minimise or segment it from the rest of life (Eikhof, 2007). The next section will look at work as an integral part of life.

2.4 Work as an integral part of life

Various methods employed to create balance can be those strategies making work an integral part of life. Individuals who work from an office in their own home need discipline to balance their demands (Lewis, 2003; Walker et al., 2008). According to Hill et al. (1998) people who worked from home had to try to develop cues that would let them know when they were to finish work. Opportunities to work from home offices may impact on the number of hours the individual engages in work activities.

Past predictions that we would be working shorter weeks and enjoying more leisure time seem to have been incorrect, the *reality* is that other predictions such as the possibility of working up to 60 hours a week (Bridges, 1994) are more likely. However, this trend can be inconsistent, as some work fewer hours, especially those in part-time employment, and others, such as middle and senior managers work longer (Towers et al., 2006). A negative perception of work as a chore leads the individual to try to separate it from the activities they enjoy. No doubt this is the situation for a number of workers, especially those who derive little enjoyment from the day-to-day routine they are required to fulfill. However, there is other research that suggests that work is taking on new meaning and that it should be integrated with, not separated from, the whole of

life (Lewis et al., 2003). Two of the reasons for this overlap are the socialisation aspect of work, and the self-identity that individuals can achieve through their work.

2.4.1 Socialising at work

The consequence of the longer hours spent working is the opportunity for *socialising* is reduced unless one chooses to socialise with work colleagues. This can increase the phenomenon of work and life becoming inextricably linked. Social clubs at work encourage employees to participate in work initiated social functions, thus facilitating the development of a social network through work. The use of the internet within the workplace means individuals are able to communicate easily for either work or pleasure (Lewis, 2003) which further encourages the development of relationships on a more personal level. Individuals are encouraged through leadership training programs to improve their emotional intelligence and build relationships with their peers, managers and subordinates on a more personal level, thus encouraging a different level of commitment to each other and the job (Newman, 2005). All of these strategies are aimed at encouraging the employee to view work not as a separate occurrence to whatever else they consider to be their life, but rather to acknowledge that there is a broader view incorporating work into life. If this type of attitude prevails then employees are more likely to derive enjoyment from their jobs, and their level of engagement is likely to be greater, therefore improving productivity (Evans, 2000).

The socialisation aspect of work can also have deleterious effects as people engage in activities such as chatting, surfing the internet and wasting time as they develop relationships and hence the emergence of presenteeism (McGregor et al., 2008). Furthermore once a social aspect to the work exists, there is also an opportunity for personal conflict which can be problematic in the workplace and in the most extreme of cases, lead to staff turnover.

2.4.2 Work as leisure

Added to the socialising aspect of work, many individuals develop friendships in the workplace and these relationships can create a *leisure* environment at work. The mere

fact that an individual goes to work does not mean they are actually performing the tasks they are employed to do. The concept of presenteeism (MacGregor et al., 2008; Savery and Luks, 2000) explains that people can be at work and not actually attend to the tasks they are required to do. Instead they may spend the time socialising with colleagues who are part of their network, they may perform personal tasks (such as share trading on the internet) or simply pass the time of day until they are ready to go home. Needless to say the aim of building a leisure dimension to work is not about employees becoming unproductive, rather it is about improving organisational outcomes and reducing staff turnover, as was the first stated objective of work-life balance policies (Newman, 2005).

2.4.3 Sense of identity

Ahmad (2003) contends that people presently draw their sense of *identity* from their work. Whereas previously people had a sense of belonging attached to family friends and church, it is now the workplace that provides that belonging. In fact the individual looks for fulfillment from his or her work as opposed to looking outside for it (Ciulla, 2000). For some, work provides not only a meaningful place to be, but can be the place where they feel less stressed and happier (Lewis et al., 2000). Isles (2004), in Eikhof et al. (2007) says that work can be a significant source of satisfaction in people's lives. She even identifies a concept called 'work lust' (p. 328) where people would prefer to be at work rather than at home. This means that work provides individuals with their status in the community because they see themselves predominantly in terms of their work role. This is another way in which work has become an integral part of life.

For some, work is well defined and has immediate rewards in terms of positive feedback or extrinsic rewards such as salary. Conversely home, where the roles are not as clearly defined, can lead to role conflict and the associated stress (Towers et al., 2006). Some workplaces develop measures of work achievement in terms of key performance indicators (KPIs), and measure the employee's performance against such set goals. These serve not only as a way for the organisation to measure but also provide the individual with a means of self-judging. According to Porter (2004) work has become a source of personal identity and the loss of a job can be very traumatic, as the

individual feels not only the loss of income, but also the loss of who they are. The link between work and self identity can also be beneficial to the organisation as people demonstrate their satisfaction through productivity improvements and improved retention rates (Newman, 2005).

Societal values today recognise achievements at work as important. Thus those who achieve well in this arena feel a sense of self-fulfillment and increased self-esteem (Lewis, 2003). This can be demonstrated by the fact that many people throughout the world would have knowledge of Bill Gates' business achievements, and that he was CEO of Microsoft and one of the richest men in the world; but how many could tell you how many children he has and what his hobbies are? Hence, it is not difficult to understand why some people choose to focus on their work, as they understand that the achievements are recognised, enjoyable and rewarding, even if they may not be on such a grand scale as those of Bill Gates.

2.4.4 Self-actualisation

Newman (2005) incorporates work-life balance into his idea of *self-actualisation*. This means to be everything a person is capable of being. He believes that if people can effectively integrate what they desire from their work into what they want to be in life, then it is possible to self actualise. The challenge is to position work and all other aspects of life so that they can be integrated, and satisfaction can be achieved (Burton, 2004; Eikhof et al., 2007). It is also possible that, by considering the multiplicity of roles filled as being integrated, they can benefit each other so that the level of attainment can be greater, and satisfaction higher (Lewis, 2003). It could be beneficial to view the parts as one whole, and the flow between these parts will give the feeling of managing the competing demands without a lot of stress. Hence, it is not always necessary to see work as separate to other aspects of life.

The result of work becoming an integral part of life can have both positive and negative impacts. The impact of changing social structures has meant people now seek out social engagement, where previously this type of interaction might have occurred within a family. This has led to the development of a social aspect to the workplace

bringing a sense of engagement to the employee, and therefore a sense of commitment, which might improve retention rates within the organisation. Perhaps a problem arises when there is too great a focus on the work, and work becomes life, leading to a negative impact on families and decreased productivity in the workplace. The following section will investigate how an imbalance might be determined and whether this is problematic.

2.5 *Determination of imbalance*

The idea that there is a definitive measure informing us as to whether an individual's life is out of balance is all but fanciful. Hacker and Doonlen (2003) propose a model that demonstrates a finely balanced set of demands and if the load on any of the demands shifts it can cause stress in other areas. This is an attempt to understand the pressure one can be under when trying to determine where to allocate time in order to derive the greatest benefit. There are so many differences in the way each person can measure balance that the best way to determine this is from an individual perspective. *How does each person perceive the situation?* It is proposed that certain factors will influence whether balance is an issue for someone, such as guilt, attitudes to work, motivations to work (consumption, aging issues), and role conflict.

How imbalance is determined is a very personal matter and it is probably something that is a shifting sensation. That is, at times people might feel they are focusing more on work that they would normally, or they might have to spend more time on an individual pursuit than usual. These changing priorities might be driven by external factors or as a result of an internal motivation. What becomes important is the ability to determine what is influencing behavior at specific times. The following points highlight a few reasons why people might feel out of balance.

2.5.1 *Guilt*

Guilt is a strong motivator for someone when they feel they are not dedicating enough time to an aspect of their life and pressure put on employees to dedicate more time to

work than family can lead to feelings of guilt (Noor, 2004). Guilt associated with the family is probably felt more by women than by men, as women perceive the caring role as predominantly theirs (Noor, 2004). For the women who feel the full-time mothering role is the ideal, when this role is not fulfilled, particularly for financial reasons, then the guilt is even greater (Lewis, 1992). This concept is reinforced by the fact that so many organisations offer part-time work which is predominantly filled by female employees (Sheridan and Conway, 2004; Tomlinson, 2001; Lewis, 2003). Although this might not be a stated objective of the organisation, it is implied, therefore women may experience guilt if they do not want to take the opportunity to sacrifice income in order to prioritise the family. The need to earn an income and manage family demands when there are dependent children can further impact on the guilt felt by parents.

Men usually feel guilt due to work-interfering-with-family (Noor, 2004) when they are not able to be present to engage in family time. According to Hall (1990), men will try to work the long hours whilst fitting in some 'quality time' with the family when they can, and they can do this because they are supported by a partner who has chosen between the 'fast track' and the family. There has been a shift in societal norms that makes it acceptable and even desirable for men to spend more time contributing to the family (Burke, 2000). However, because it has been shown that if men do choose to take advantage of the benefits of work-life balance policies they are more than likely choosing to *limit* their careers (Lewis, 2003). Hence, men are put into a situation of feeling guilty because they are not helping in the home due to their long hours at work, or alternatively they help at home and limit their career opportunities.

In OECD countries there are a growing number of single parent families (Evans, 2000). This creates another set of difficulties because there is no supportive partner who can shoulder the responsibility for the absent one. This creates an even greater likelihood of guilt as there are two very distinct requirements of the single parent which are to provide both time and financial support.

Generation 'X' and 'Y' are the offspring of the Baby Boomers, and although they have grown up with all the possessions they need, there has been limited time with their parents (Hamilton and Denniss, 2005). The parents feel guilty about their divided

priorities and deal with this by buying goods and services for their children as a substitute for being there. Working excessive hours and spending less time on life can be justified by the need to provide for the children, because one generation does not believe the next generation has a good work ethic (Porter, 2004). It is possible that this reasoning is used to alleviate the guilt that some people feel for not being present.

Guilt impacts on the individual, and ultimately on the organisation, as workers are constantly trying to balance demands from work, family and other interested parties. Once a choice is made that favours one party over the other the feeling of guilt arises about the party that was let down. This leads to a sub-optimal outcome in both domains (Hacker and Doolen, 2003).

Another factor indicating whether an individual might feel their balance is challenged is the attitude they have toward what it is that they think is dominating. Thus, if the demands of work are dominating their time, is it of concern, or is it the life aspect that is troublesome?

2.5.2 Attitudes to work

Consideration of *what is pushing people to work so hard* is required. Predictions were that we would work fewer hours and have more leisure, but it is apparent people are working longer (Roberts, 2007). The fact that some individuals readily accept an excessive workload (Russo and Waters, 2006) is clear, but how does one determine what is excessive? Porter (2004) suggests that it could be said many people are working excessive hours, and that for some this is a source of concern, whereas others are still able to find the opportunity for balance in what is already a very tight schedule. This reinforces the idea that attitudes to work-life balance are individual. Some people feel completely challenged by their competing priorities whereas others are able to manage the demands.

There are many other people though, who feel unrelenting pressure and are unable to find the balance they seek, so they choose to opt out of the big corporation cycle of work (Pollitt, 2008; DeLollis, 1997). Daniel (2004) cites this as one of the key

reasons women are exiting the corporate workplace. The author identifies three main reasons including dissatisfaction with corporate life and a desire for a greater challenge, and importantly, a desire for more balance between work and home, especially greater flexibility. If this desire is so strong that they choose to step out of the security of corporate life into the uncertainty of self-employment, then there is clearly a feeling that the balance is not satisfying. This decision also reinforces the suggestion that although there are policies concerning work-life balance issues in organisations, access to them is either difficult (Bardoel, 2003; Wise and Bond, 2003), the consequences of using them can be disadvantageous in terms of career and/or family (Peus and Traut-Mattausch, 2008; Tomlinson, 2004; McDonald et al., 2003), or the individuals who access them feel concern with equity issues (Lambert and Hayley-Lock, 2004).

Porter (2004) suggests that the amount of work people do will be linked to the meaning that work has in their lives, and that this will change over time. Therefore, it can be assumed the perception of whether work is consuming too much time will also be likely to change. The various stages one goes through with work and life will naturally change priorities, but how one responds to these changes will influence how work-life balance is perceived and how organisations manage the competing demands of employees (Sheridan and Conway, 2001).

The changes in demands tend to be associated with the different stages in life. Young, single employees have very few extra demands on their time except, for example, social demands or study requirements. Once a permanent partner becomes a feature then there are additional priorities; the arrival of children in a relationship further complicates the picture. Finally these children find partners and have their own children, so that means grandchildren also increase the demands on the person's time. With increased life expectancy there is a strong likelihood that the parents of this individual will require some sort of care too. Thus these people (Marcinkus et al., 2007) have competing demands of work and family that have been changing throughout their life. This group has become very important in the workplace because they have skills, knowledge, and a very good work ethic and therefore, losing them due to work-life balance issues is a big loss to the organisation. Hence, this provides the organisation

with a challenge to ensure that work provides reward (Walker and Webster,2007) as well as the opportunity to attend to all the other aspects of life.

Due to this constant change it would be reasonable to view work-life balance, not as an *outcome*, but rather as a *process*. This process consists of doing what is reasonable today to suit one's needs, together with being ready and able to change it when the time is right or when it is required by changing personal circumstances.

2.5.3 Consumption

The desire to have possessions is a key driving force in our society. The growth of consumerism, innovation and marketing has led to an almost insatiable desire to have and to own. Hamilton and Denniss (2005) discuss the concept of 'affluenza' in that society is being driven to work excessive hours due to the desire to consume. They explain that we now live in bigger houses with fewer people in them, and that we own more assets than ever before, yet we are not happy even though we have so much. The consequence of people wanting to buy is that they must pay for their purchasing habits; hence there is a need to increase earnings. This leads to voluntarily increasing work requirements in that the organisation is not insisting that more hours be worked (van Emmerick and Sanders 2005). However, individuals are compelled to work longer as they are over committed financially. In Australia in January 2008 research conducted by JP Morgan and Fujitsu Consulting (news.com.au, 03/02/08) showed that 750,000 homeowners will suffer mortgage stress that year. A lack of control over credit cards is another indication of the excessive consumption in society. The statistics (Brinsden, 2008) show that 25 percent of Australians admit to overspending on their credit card and 9 percent state they are only able to make the minimum payments each month. It is the need to meet these financial commitments that drive people to work-life imbalance.

2.5.4 Aging issues

What is probably becoming more of an issue for employees is the need to provide for elderly parents and one's own retirement. As the population ages we are increasingly facing the issue of caring for aged people due to the increases in life

expectancy (Walker et al., 2008; Evans, 2000) and the decreasing financial contribution of government. Thus the hype surrounding maintaining lifestyles in the anticipated long retirement, virtually frightens people into working at a frenzied pace to ensure there is sufficient accumulated wealth to provide for a comfortable old age. Another issue with the aging population is that the current workers need to save for their retirement because they are looking at a longer time in that phase of life (Walker and Webster, 2007). This is having an impact on their need to stay in the workforce (Porter, 2004).

This creates a group of people who are having to take responsibility for their aging parents as well as their children and, in some circumstances, their grand children (Marcunkus et al., 2007). Significant demands are placed on their time as they strive to balance all the competing priorities. Many organisations have recognised this phenomenon and have put in place additional types of leave, such as carer's leave, in an attempt to retain these workers.

2.5.5 Role conflict

Individuals fill a multiplicity of roles including that of employee, parent, child, partner, community worker and student with these roles creating competing demands on available time. As Hacker and Doolen (2003) explain, this is a precarious balance and if one area is altered without expectation, everything is thrown into chaos. What is it that creates this chaos or this feeling of competing demands?

Role conflict is the concept explaining the conflict an individual faces when they attempt to choose between *competing* demands (Russo and Waters, 2006; Shelton, 2006). As boundaries between work and other roles become increasingly blurred the result is that individuals start to feel stress and dissatisfaction (Lewis, 2003). This role conflict frequently manifests itself as work-family conflict (Shelton, 2006) where, more specifically, the demands from the roles of work and family create the greatest tension. Individuals who have a greater number of roles face increased demands on their time. Many of the work-life balance policies are designed to help with managing the increased demands of having dependent children as coping with these requirements can be difficult.

Shelton (2006) has studied this phenomenon and the author has developed a model looking at how entrepreneurial women deal with this conflict in an effort to improve their work-life balance. Three main strategies were identified for manipulating roles in order to make this more manageable: role elimination, role reduction and role-sharing (Shelton, 2006). The benefit of these strategies is that the individual is aiming to reduce the actual level of role conflict rather than trying to manage the stress associated with it, so rather than using coping strategies, the problem is reduced. Examples of how this could work are set out in the Table 2.1.

Table 2.1: WORK-FAMILY MANAGEMENT STRATEGIES AND IMPLEMENTATION

STRATEGY	IMPLEMENTATION
Role Elimination	No family Do not start own business
Role Reduction	Smaller family, Defer family Work part-time or casual
Role Sharing	Delegate venture role: participative management techniques, include other family members in the business Delegate family role: outsource family obligations by hiring child care, partners relieve each other for various tasks, recruit extended family members assistance.

(Adapted from Shelton, 2006 pg 290)

These strategies are useful for all people who struggle with competing demands and roles. Needless to say the roles are not always going to be work and family as there can be conflict between other roles. An example could be the social versus study, or the work and study challenge (Holmes, 2008) which is often faced by young people, and Shelton’s model can assist with setting some specific ideas for coping with this challenge.

Role conflict is one of many causes that may 'push' women out of the corporate environment into self-employment (Walker and Webster, 2006; Daniel, 2004). If organisations have recognised the value women bring as employees (Marcinkus et al., 2007) then it seems a waste of resources to not try to accommodate their needs and to implement work-life balance policies that actually help them reduce this conflict, whilst remaining employed. The opportunity for role enhancement can bring great advantages to both the family and the organisation. Roles can accumulate and achievements of one can contribute to the other. Work experiences might give the individual skills that can be beneficial in the home and vice versa.

Based on the preceding discussion, work-life balance appears to mean different things to different people. It is also apparent that sometimes the benefits are not clear to the employee or the employer, hence some people perceiving them as being disadvantageous, and this may contribute to a lack of uptake of these policies. There are clear reasons as to why people might be working long hours or dedicating an inordinate amount of time to their work. The vast array of motivations to work in general can be used as excuses for work excess, or they can actually provide the motivation for an individual who chooses to sacrifice 'life' for work. What is problematic is determining whether one thinks they have or need to achieve a balance. This is where individual choice becomes apparent and the desire to make change to personal situations might arise. What is not clear is whether people comprehend these reasons and act upon them or not. This leads to Research Issue 1 below:

Research Issue 1a: *To what extent do individuals determine their work-life balance?*

b: *To what extent is work-life balance of concern to them?*

2.6 *Focus on employees*

Employees are the key targets of work-life balance policies. There is a significant body of research into this field focusing on work-life balance and the employee. Some research is focused on considering what can be done to provide employees with work-life balance opportunities and how organisations can implement these (Hill et al., 1999; Wise and

Bond, 2003; Smithson and Stokoe, 2005; Clutterbuck, 2004). Other research considers whether the work-life balance policies actually provide the employee with improved working conditions or whether the policies favour the outcomes for employers (Tower et al., 2006; Lewis, 2003; Tomlinson, 2004).

What is discovered through such research is that it is critically important for organisations to have an understanding of the benefits and/or costs of these implementations. Organisations are keen to pursue these policies due to the sound business case for them (Clutterbuck, 2004) and because there is a great need in the current work environment to attract and retain staff. For example due to the low level of unemployment in Australia and low numbers of entrants into the labour market because of the smaller size of Generation X and Y, it is important for organisations to retain staff (Westerman and Yamamura, 2007). Many organisations are particularly keen to retain the Baby Boomers, as they have experience, maturity, and are known for their strong work ethic (Marcinkus et al., 2007). Thus, there are clear reasons as to why the emphasis of the research is on employees; but there is also a need for there to be research into business owners, especially small business owners.

Although there is some research about work-life balance in small business and some about work-life balance for small business owners, overall this is an area that is lacking (Shelton, 2006; Daniel, 2004; Loscocco and Smith-Hunter, 2004; Walker et al., 2008). The paucity of literature implies an area of investigation requiring attention especially as the owners of a business have as much right to have a life as do employees in a large organisation. Some examples of the limited research conducted in this area are detailed below.

Shelton (2006) conducted research into work-family conflict and the resultant work-life balance outcomes for female entrepreneurs who have exited the corporate setting due to an inability to achieve a balance in that setting. The author considers the guilt women feel about the competing demands but develops a model that can be used to determine strategies to minimise the impact of one role on the other. Daniel (2004) has also conducted research into the exodus of women from the corporate workplace to self-owned business. The author considers the impact of striving for work-life balance on

women in large organisations and the subsequent decision to leave this employment to start their own small businesses in an attempt to regain or achieve what was elusive as an employee. Daniel (2004) highlights the gender imbalance in managerial positions within organisations and points out women are subject to experiences which ultimately leave them highly dissatisfied with the corporate setting. Women believe the desire to have more control over their lives and to be able to use their skills will be more achievable in their own businesses. Loscocco and Smith-Hunter (2004) consider the impact on women of running home-based businesses on role-conflict. Their research indicates that working from home reduces work-family conflict, but it also reduces financial reward.

While previous papers focus on women in small business and work-life balance challenges. Research conducted in Scotland examined the incidence and impact of flexible working arrangements in small business (Maxwell, et al. 2007). The authors discussed many of the flexible working arrangement initiatives that small businesses can adopt for employees and found there was scope for increasing the implementation of such initiatives. It was apparent that flexible working arrangements could improve attraction and retention for the smaller businesses.

Naturally this is harder for small business owners to achieve due to the cost constraints and the fact that the owners have the ultimate responsibility for the businesses profitability. This research will extend our understanding of the opportunity for different small business owners to obtain work-life balance by increasing our current knowledge regarding this situation. It is important to broaden the focus of the current research to be able to determine a clearer understanding of how business owners feel about their opportunity for having work-life balance, whether the move into small business ownership has improved their work-life balance, whether they actually think about work-life balance for their employees, and if it is something they think they can integrate into their work practices. This gap in the literature is one this research will investigate.

However, the focus of current literature tends to have an emphasis on large organisations. As much of the research is on employees from these types of businesses

it is important to discuss this focus to further highlight the need for research about small business.

2.7 Large organisations

Much of the research conducted in work-life balance has focused on larger organisations including public sector departments (Hill et al., 1998; Evans, 2000; Hacker and Doolen, 2003; Burke, 2000; Posig and Kickul, 2004; Maxwell et al., 2007). This has meant the organisations considered tended to have greater resources to provide family friendly policies. This research indicates that these initiatives provide a positive outcome for the organisation from a financial perspective. Thus, encouraging the development of these practices. However, if the competitive position of the firm was to be disadvantaged it would be inclined to abandon the initiatives (Evans, 2000).

A significant amount of research into the business case for work-life balance is focused on the larger organisation. Much of the research, including Clutterbuck's (2004) findings talks about the need for top management and line managers to be informed about the benefits these policies provide. This has created discussion about the need to implement organisational culture change, including a redesign of work processes and human resource systems.

Reflective of the emphasis on large organisations is research by Wise and Bond (2004) who conducted studies on four financial services organisations. These businesses were larger organisations possessing structures that included middle management and human resource processes. Thus they were well resourced and had the capacity to provide work-life balance options for the employees. Similarly Brough, O'Driscoll and Kalliath (2005) conducted studies into the role work-family conflict had on levels of family satisfaction. The sample included 700 male and female employees of large New Zealand companies and was spread across several industries. Managers from a Fortune 500 company were the candidates studied by Posig and Kickul (2004); Lewis (2001) conducted a case study in a public sector organisation, and Hughes and Bozionelos (2007) researched the concept of work-life balance in a bus company. It is apparent that

much of the research being done is focusing on these larger organisations and concentrates on the need for, development, introduction and benefits of work-life balance policies. Evans (2000) points out that the data from employers about this concept is usually about the formal policies available, and this is especially so for large firms. Hence, the research focused on organisations that one could assume would have greater resources than a small business.

This is all extremely valuable information as it has provided a foundation for subsequent research. In particular, some of the concepts have been expanded and new models have been developed as a result (for example Shelton, 2006), which can be extrapolated from one circumstance to the other. Many of the findings are significant for this size of operation as they tend to rely on having a sizable organisational structure behind the policy. The research provides guidance for managers about how to implement policy so that the organisation can derive benefit from it (Bardoel, 2003; Clutterbuck, 2004). Furthermore it gives organisations insights into what are current, and hopefully successful, techniques for improving employee performance and satisfaction (Towers et al., 2006). Therefore this demonstrates that although the research is highly informative it might not be applicable in the small business setting.

The research can be limited if it is to be applied to much smaller firms, particularly where there might be very few staff members and the possibility of flexibility is less likely (Maxwell et al., 2007). Lewis (2003) supports this view when pointing out that many of the flexibility options, such as telecommuting, are well suited to knowledge workers and that other industries might not be useful in all work arrangements.

The development and provision of these policies is only the beginning of helping employees establish a balance (Russo and Waters, 2006). The accessibility to these initiatives and the relevance to their specific situations determine how valuable they are to employees (Tomlinson, 2004, McDonald et al., 2005). If a person's career is actually hindered by making use of family friendly policies then he/she is unlikely to take up the opportunities (Lewis et al., 2003). Bardoel (2003) explains this in terms of work-family responsiveness.

The issue of work-life balance has progressed from being focused solely on people with families to include all individuals. The fact that organisations have recognised the importance of providing policies that will facilitate individuals improving the balance they seek indicates it is important (Evans, 2000). What we have seen though, is that having the policy will not necessarily lead to the desired outcome (Russo and Waters, 2006). Furthermore, some of the policies designed to improve the worker's balance actually encourage them to increase the amount of time spent working. Towers et al. (2006) explain the sleight of hand where policies are implemented to make working easier and less intrusive; they actually mean that we spend more time working than previously.

Many of the policies are designed to suit large organisations and could possibly be too costly for small organisations to implement (Maxwell et al., 2007). The provision of many of these technologies is only made possible if the organisation is reasonably large and has sufficient resources. The cost of providing all employees with laptop computers, Blackberry devices, and mobile phones would be prohibitive for small companies.

There seems to be a *lack* of research into the concept of work-life balance in *small* organisations. The fact that in 2007 Australia has a substantial number of small businesses (ABS 2007) makes this an important sector to investigate and develop an understanding about how these businesses manage work-life balance. Apparently, many individuals think that one of the best ways for them to regain their work-life balance is to leave the large organisation and start their own business. Much of the research stops at this point where individuals declare this is what they are going to do. *This research seeks to answer not only whether starting a small business will provide the balance sought, but also whether the better choice to achieve this is a franchised or independently owned business.*

The desire to be employed by those organisations that provide opportunities for work-life balance is compelling. The promise of 'having it all' in terms of career, family, financial security and personal goal achievement is alluring. However, research shows

that many individuals, particularly women, are opting out of large organisations to start their own businesses in an attempt to regain control (Smith, 2000; Buttner and Moore, 1997). Men are also showing increased interest in assuming greater control and are, in this way, seeking a better solution to their work dilemma (Evans, 2000). There is always a risk when starting a business, as the perceived benefits of self-employment tend to be offset by the cost of increased risk (Kaufmann, 1999).

2.8 *Independently owned small business*

Small business can be somewhat problematic to define due to the multiplicity of criteria that can be used to determine size. According to Teicher, et al. (2002), small businesses are defined in terms of numbers of employees and the industry they are in, together with independent ownership and operation, centralization of control (especially by the owner and/or the manager who are also contributors of most of the operating capital), and responsibility for decision making.

Small business is a vital and significant sector in the Australian economy (Still and Timms, 2000). The Australian Bureau of Statistics categorise small business as one employing less than 20 people, with a management structure that has independent ownership and close control by the owners/managers, who contribute most of the capital and they are the principal decision makers (ABS, 2004). For the purposes of this research the ABS, 2004 explanation of small business is utilised. Figures from the Australian Bureau of Statistics (2007) show that, as of 2007 there were approximately 1.8 million small businesses run by a total of approximately 1.84 million operators (ABS, 2008) in Australia. The majority of these operators were involved in one business only. Male operators outnumbered female operators 68 percent to 42 percent respectively. The majority of business operators are aged between 25 and 54 years of age (ABS, 2008). Although the majority of small businesses (61%) were non-employing businesses, the other businesses employed between 1-4 employees (27%) and 5-19 employees (12%) (ABS, 2007).

Small business comprises a significant sector in the economy, as in itself it provides an income to the many small business owners as well as providing employment for several million more. The impact of these numbers is very positive to the Australian economy and is a source of economic growth, much of it due to the entrepreneurial drive of individuals (Walker and Webster, 2007; Still and Timms, 2000).

There has been much research investigating the motivations to start a business (Stanworth and Kaufmann, 1996; DeLollis, 1997; Van Geldren and Jansen, 2006; Walker et al., 2008). These have investigated such concepts as; the hope to make a contribution to society, the desire to accommodate work and family life, independence, and peer group recognition. Many of the papers cite gender based differences and show the desire to have work-life balance as a key factor for women, while men rank making more money higher, again showing the influence of gender in reasons for starting a small business (Robinson, 2001; Lerner and Almor, 2002; Shelton, 2006; Daniels, 2004) .

Women are often placed in a situation where they feel their progress in an organisation has halted “...because of the glass ceiling and other discrimination they experience in the organised workplace” (Lerner and Almor, 2002 p. 110). Other hindrances identified include working in a culture that does not accept women, and the lack of access to informal networks where more social relationships are developed (Daniel, 2004). It is often from these relationships that a stronger commitment to ones’ colleagues develops, leading to the likelihood of being informed and included in career path advancement. Furthermore, one of the biggest problems women face is male stereotyping that still sees a woman’s primary role as in the home and looking after the children (Lewis, 2001). This perception becomes a barrier in the corporate setting as women are not considered for promotion by the more senior male management (Tomlinson, 2004). Due to the challenges faced by women in the corporate sector some choose to become business owners.

Given these findings, a woman’s next step is starting her own business. Women tend to succumb to what are known as “push” factors (Lerner and Almor, 2002), which include frustration and boredom in their jobs. Other reasons identified as to why they leave the corporate setting are a desire for more balance and flexibility in their lives, for

a greater work challenge not available within the corporate setting (Daniel, 2004) and to find a solution for work-family conflict which seems unachievable otherwise (Shelton, 2006). It is these reasons that push women into small business ownership.

According to Walker and Webster (2007), in Australia women constitute 32 percent of small business ownership. This statistic suggests there are many women with the skills to be in business but not the desire to be dictated to by the rigors of a large organisation. Australian Bureau of Statistics figures indicate that 39.6 percent of female business operators work full time, as opposed to 80 percent of their male counterparts (ABS, 2004). It would appear that, even in small business, women are pursuing the opportunity to achieve a better balance in their lives by taking on part-time hours for work, but these hours are self-determined as they are their own boss (Buttner and Moore, 1997).

It also could indicate that even though large organisations suggest they can accommodate the needs of work-life balance, in reality there is limited access to these provisions, and therefore women take their skills and establish a business outside the corporate world (Walker et al., 2008). For example if they take on a part-time role it can be career limiting, whereas in business if they decide to work part-time there is always the opportunity to employ staff to fill the void, and the result is they are still the owners (Shelton, 2006).

“Pull” factors are the main reason men leave organisations (Buttner and Moore, 1997). These factors include the opportunity to work independently, to be more in control of outcomes, and to make more money. As highlighted by the Australian Bureau of Statistics (2004) out of the 80 percent of male business operators working full-time in their own business 36.6 percent report working more than 50 hours per week. The difference in this situation is that these self-employed people are making the decision to work these hours as opposed to feeling obliged and pressured to be at work. Ultimately the responsibility for the profitability of the business is on the owner, and compelling them to spend long hours working, or they may be extremely satisfied with business ownership and happy to be working. This situation raises the issue of work-life balance for small business owners which will now be discussed.

2.9 *Work-life balance issues for small business owners*

With much of the research focuses on work-life balance in large organisations and on their employees there is a lack of information on small business owners in this field. What we do know is that small organisations are “resource disadvantaged and need to leverage every resource at their disposal” (Litz and Folker, 2002 pg 341). Therefore small business operators can be significantly challenged when it comes to managing their time and priorities. Although individuals leave the corporate life to increase their flexibility and have more discretionary time (Buttner and Moore, 1997; Daniel, 2004) sometimes there are issues that make this difficult to achieve in reality.

The lack of resources can be quite limiting as far as growing the business is concerned (Litz and Folker 2002). Many businesses owners do not employ additional staff as demonstrated by the ABS (2008) data which show 1,171,832 non-employing businesses. There are no additional labour resources to relieve the workload at times of high demand. A consequence is that in the early stages of the business the owner is able to be more flexible with time and place for the work, but as the business grows then this flexibility can be diminished as the demands also grow (Daniel, 2004).

Within this context it should be recognised that business owners may actually choose a growth strategy for their business depending on the other goals they wish to pursue (Still and Timms, 2000). Some might decide not to grow the business, or to choose a limited growth option for the time when they have small children, for example, so that they can dedicate time to their needs whilst they can (Daniel, 2004). This decision is reflective of making some choices incorporating multiple demands in the business owner’s life.

Sometimes the choice of business is based on what time the owner wants to put into it. For example, the knowledge worker is able to conduct business from many different locations and at all different times (Towers et al., 2006, Lewis, 2003) therefore allowing flexibility in time and space. If the objective of the business owner is to have the time to attend to other pursuits that require them to be available during the

daytime hours then this choice might suit them, as they have the discretion to set their own schedule, as long as it meets customer requirements.

There can be a *financial* impact for the business owner if he/she chooses to prioritise work-life balance (Walker et al., 2008). If working on an hourly basis, as many consultants are, the choice not to work and engage in leisure activities is made with the knowledge that there is a cost involved. This is the opportunity cost that is, the cost of forgone income. If, as a sole trader, you are not working then the billable hours will be decreased, hence the income decreases. Alternatively, if business owners choose to employ additional staff to fill in for the times when they choose not to be there, then there is an additional cost (Gerber, 2001) in terms of wages and items such as superannuation and other ongoing costs. Thus, there appears to be a choice between cost and flexibility for the small business owner whereas, in a larger organisation, there are many more resources and this flexibility appears much easier to achieve (Evans, 2000).

Role conflict (Walker et al., 2008) can become a major issue for small business owners. The pressures that arise from work-family conflict (Russo and Waters, 2006) can be significant if they are not managed, and the resultant stress can be damaging to the individual and the business. Previous research by Shelton (2006) provides a model of role elimination, role reduction and role sharing (as previously discussed). This model provides the small business owner with some guidance in how to manage some of the conflicting demands. However, it does not incorporate specific and practical suggestions as to how to manage the role conflict.

Some conflicts people can face include; whether to start a family at the same time as a business or whether there is enough financial capital to be able to employ sufficient staff to adequately run the business. Decisions about balance can include considering if there are sufficient resources to allow time away from the business to attend to aging parents (Marcinkus et al., 2007; Lambert and Haley-Lock, 2004), or is there enough superannuation to allow the business to be operated part-time so other time can be spent on alternative activities for example, travelling? These are the kinds of decisions that become important to the small business owner.

The importance of considering all the aspects of what factors will affect one's life once the decision is made to enter into a small business cannot be emphasised enough. This decision means walking away from the security of a regular salary and support network, including benefits like sick leave superannuation and work colleagues. Will this impact on the business owner's opportunity to achieve the flexibility, balance, financial reward and control they believe is attainable by becoming business owners, and how can staff contribute to make this easier? (Buttner and Moore, 1997)

Once the small business owner decides to grow to the point they need to employ staff, new issues are raised with respect to managing the business. This also has potential impacts on their work-life balance. One of the biggest challenges in the Australian workplace at the moment is the low unemployment rate (ABS, 2007) (although this may rise during the current global economic crisis). This has meant that employees are able to move easily from one job to another leading to instability in the workplace. This can create quite a burden on small business because there is a cost in employing and training staff. If they leave soon after commencing work this impacts on the business, the burden to cover for them will often fall on the owner who takes back the control of that area of the business (Gerber, 2001).

Another problem with employing staff when there is low unemployment is the competition for scarce resources, and this has resulted in employees wanting extremely good working conditions. It is not unreasonable for people to want to work in good circumstances, but at a time when some businesses are providing perks to their employees, including memberships to gyms, massages and free bicycles (Ruiz, 2007), it becomes very difficult for small business to compete in the recruitment and retention of staff.

Generational differences are also an issue for small business when dealing with retention and managing of staff. Intergenerational conflict is a phenomenon found in many organisations, as the Baby Boomers, and Generation 'X' and 'Y' bring their different work styles together (Westerman and Yamamura, 2007). These differences have been discussed previously, but require consideration, in that in many instances, the

small business owner is a baby boomer and the staff members they employ are Generation 'X' or 'Y'. These situations can become a source of frustration as generational differences collide since the owner and employee are driven by different values and work ethics.

The Boomers have a strong feeling of loyalty to the organisation and hence they give commitment when employed. This suggests that for a small business owner, this staff member will arrive and do the required work at their scheduled time (Marcinkus et al., 2007). The Boomers also tend to be self-sufficient and do not need a great deal of instruction or feedback to get on with their tasks and are also interested and happy to mentor younger workers (Glass, 2007). On the other hand the Generation 'X' people are not very trustful of others, like to work on their own, rather than in a team, are technologically savvy (Yrle, Hartman and Payne, 2006) and place a high level of importance on having work-life balance (Glass, 2007). The next Generation "Y" is now slowly entering the workforce and they too have their typical characteristics which include being sociable, confident, a need to be organised by others, as well as requiring regular and detailed feedback (Glass, 2007).

For the small business owner, who is already in competition with larger organisations for staff in a time of low unemployment, it is beneficial if he/she can be in tune with what is important to, and what motivates the staff they employ. If the owner is a Boomer and they employ Generation 'Y', then they need to recognise the importance of both instruction and feedback to this employee. In a small business it might be difficult to have the time to be attending to this need, so perhaps this is not a good fit as the owner may have to make a concerted effort to manage the employees effectively. There is also the problem with Generations 'X' and 'Y' that they are not loyal to an organisation. Consequently, if they are not happy they are likely to leave with the availability of jobs making this possible (Westerman and Yamamura, 2007).

It is clear there are many issues that can influence the work-life balance of a small business owner that require investigation. The challenges they face are not necessarily unique, but they are different because of the size of their business and the

resources they have available to them. Therefore, given the above discussion, the following research issue is presented.

Research issue 2. How does starting a small business provide an opportunity for individuals to improve their work-life balance?

2.10 Different business models

The small business sector includes franchised and independently owned businesses. Independently owned businesses in this research are the non-franchised businesses. This research project will compare these two different business models to investigate whether there is a difference in work-life balance between the two.

Franchising is an organisational form allowing a parent organisation (the franchisor), and a locally based outlet (known as the franchisee), to sell a product, service or brand name that is owned by the franchisor (Doherty and Quinn, 1999; Mendelshon, 1999; Duckett, 2008). The franchisee pays fees in the form of a lump sum and/or a royalty for the right to conduct this business within the franchise network.

Falbe and Daindridge (1992) define franchising in terms of product/trade name franchising and business format franchising. Business format franchising is the format used most frequently in franchising ventures (Doherty and Quinn, 1999; Alon, 2001). It has been defined by the International Franchising Association as “a continuing relationship in organising, training, merchandising and management, in return for a consideration from the franchisee” (US Department of Commerce 1994: ix in Alon, 2001). The intention of business format franchising is that the franchisor will provide the franchisee with a formula for success and therefore minimise the risk involved in starting a new business venture.

Franchises take different forms and the most common are manufacturers with the rights to manufacture under a trademark, wholesalers who have an agency to distribute to retailers, distributors for manufacturers, retail franchises and service

franchises (Nathan 2000; Stanworth and Curran, 1999). Independently owned businesses are owned by individuals who wish to operate independently and take full responsibility for the provision and delivery of their product or service. They develop their business systems and change them as desired as they are not locked into a 'formula'. The non-franchised business has the independence to make choices across a range of activities. They can make decisions about the times they want to operate the business, the type of product or service they provide and the manner in which they provide it. They are not restricted by specific requirements for store fit out; they can decide their own suppliers and they can develop their own way of operating. The difference is the discretionary ability they have in decision making compared to the franchised model.

Franchising as a business model is found in many countries (Watson and Kirby, 2004; Quinn, 1999; Alon and McKee, 1999) largely due to global expansion of businesses from specific countries. Many different countries have their own franchise chains that they seek to expand globally. Increasingly this expansion seems to be predominantly regionally based or follows historical and cultural ties. For instance Portugal and Spain tend to expand into South America. Throughout the world there are five franchising sectors (Hoffman and Preble, 2004): North America, South America, Europe, Asia and Africa/Oceania, indicating that the spread of franchising as a business model has been extremely far reaching and pervasive. Large franchised organisations from the United States, such as McDonalds, are seen around the world. Australian franchises, such as Gloria Jeans, are also moving globally, having franchising opportunities in countries all over the world.

The growth of the franchising sector in Australia has meant that it is a significant employer of people (Frazer, et al., 2008). These franchises include business format franchises, motor vehicle sales franchises and fuel retailers (Wilkie, 2007). What motivates an individual to become a franchisee is influenced by two different decisions. The first is to become self-employed and the second to select between an independent and a franchise as the preferred business model. The initial decision to start a small business tends to be driven by similar motivations for either an independent or franchised small business and some of these motivations include factors such as control

over decision making, managing work-family conflict issues, prior work experience and pursuing alternative employment opportunities (Kaufmann, 1999). The more specific decision about starting a franchised business is affected by different motivations. The extant literature identifies some of the motivations to become a franchisee include access to a proven business model which is believed to reduce the risk of running the business, the ability to use an established brand name, access to networks as provided by the other franchisees in the system and the provision of support by the franchisor (Stanworth and Kaufmann, 1996; Stanworth et al, 1998; Weaven et al, 2007). These motivations to become a franchisee are supplementary to the motivations to start a business such as those previously mentioned.

As franchisor support is a feature of joining a franchise system it can be attractive to individuals who are inexperienced in running a business or are unfamiliar with self-employment (Frazer, 2001). This support is aimed at complementing the established business format and systems which are designed and implemented to enhance the franchisee's business performance. Support is one of the major benefits of joining a franchise system and it includes for example initial and ongoing training, provision of operational manuals and marketing arrangements (Mendelsohn, 1993) and it is one of the major differentiating factors between franchised and independent business models.

Along with the provision of systems and support franchises have specific requirements and standards of performance that must be met as franchising is based on the agreement between parties where a parent company, (the franchisor), appoints other operators, (the franchisees), to replicate the service, product or brand name (Doherty and Quinn, 1999; Mendelsohn, 1999). The requirement to replicate the business and to comply with the standardisation of the business can come to be considered restrictive by some franchisees. As franchisees become more experienced with running the business and want to have greater autonomy in decision making with respect to their own business there is a tendency for the standardisation to appear as restrictions. This change in the relationship and the resultant change in the franchisee's acceptance of franchisor influence can lead to conflict (Tikoo, 2005). Hence, some of the initial factors that attract individuals into franchising can with time can be viewed to be

restrictive. However the size of the franchising sector would indicate that this is a popular choice as a business model and this problem might not always become an issue.

Over the last few years the size of franchising has become significant from a global perspective. In the United States franchising revenue from franchised outlets in 1991 “...generated more than \$750 billion in combined retail” (Dant, 1995 p.10). More recent figures show that sales in 2000 accounted for approximately 50 percent of all retail sales, totaling \$1trillion, and some consider the growth potential for franchising world-wide to be exponential (Hoffman and Preble, 2004).

Franchising is extremely popular as a business model and in Australia (Wilkie, 2007) there are approximately 71,400 franchised units producing sales of AUD \$130 billion (Frazer et al., 2008) demonstrating how important it is to the Australian economy as a whole. It impacts on Gross Domestic Product in two ways. Firstly, it creates business growth and hence employment for many individuals. This outcome has the multiplier effect of income expenditure where the employed people spend their wages. Secondly, there are many products introduced into the market which encourage individuals to purchase. As Porter (2004) states, the ever increasing availability of products and the marketing of these products drive us to ‘want’. If franchising accounts for 50 percent of retail sales then it is logical that a significant amount of marketing is being employed by this sector (Frazer et al., 2008). Franchising is based on two theories, agency theory and resource theory (Dougherty and Quinn, 1999). These two theories will be discussed and some assumptions will be made to explain why individuals running a franchised small business might expect greater work-life balance than individuals running a non-franchised small business.

2.11 Agency Theory

Franchisees own of the rights to operate the business as outlined in the franchise agreement. They are considered the agents in the franchisee/franchisor relationship (Doherty and Quinn, 1999) as they conduct the business for their own benefit as well as for the benefit of the franchisor. Franchising a business offers an opportunity for growth for the franchisor and, it is proposed, a limited risk small business opportunity for the

potential franchisee (Stanworth et al., 1998). Agency theory suggests that franchisees provide a reliable labour source, particularly in remote geographical areas, as they will be less likely to need supervision due to their vested interest in the business and thus they are less likely to shirk their responsibilities to the business and the franchisor (Alon, 2001). There are many aspects to agency theory that suggest that this might not always be the case (Chow and Frazer, 2003) and that franchisees might not always act in the best interests of the franchisor. Some of the reasons for this aberration are discussed.

There can be a power imbalance between the agent (franchisee) and the principal (franchisor) based on factors such as information asymmetry in which franchisors only provide a certain amount of information to the potential franchisee prior to the signing of the franchise agreement (Doherty and Quinn, 1999). This happens due to resistance to be completely open about the system before it has been paid for. Thus, from the very beginning there is uncertainty about the requirements and, potentially, a gap in the expectations of the two parties. Additionally the potential agent (franchisee) might also limit the amount of information provided to the principal (Chow and Frazer, 2003). This could happen because the potential franchisee does not have the appropriate skills, finances or ability, and are reluctant to reveal this prior to finalising a franchise agreement in case it jeopardizes the chance of being accepted.

“Moral hazard” (Doherty and Quinn, 1999 p.228) is another concern. This occurs when the franchisees act more in their own self-interest than in the interest of the franchisor. This could happen in situations where the franchisor outlines aspects of the business such as the required opening hours. The franchisee might follow the time requirement, but the franchisor does not have control over the amount of effort that is exerted during those hours.

Acting out of self-interest (Castrogiovanni and Justis, 1998) might also contribute to diverging outcomes. The fact that the agent has a desire to participate in the franchise system does not guarantee he/she will have the same vision as the principal for the best way for the business to proceed. What is important to one person might not hold the same relevance to others. Franchisors try to manage the relationship by imposing control through agreements and the upfront payment for a franchise, as

well as the ongoing royalties (Duckett, 2008). These controls sometimes do not guarantee compliance to the agreement when franchisees seek to assert their independence in the business. This is seen when organisations franchise internationally, and differences in culture impact on the way the franchisees operate within the designated system (Quinn, 1999).

The diverging interests and power imbalance as suggested by the discussion of agency theory indicates there could be issues with respect to work-life balance when deciding to buy a franchise. If the desire to take back control and to determine how to allocate one's time between work and life activities is to be achieved through starting a small business is this business model suitable? The security in having an established business format to follow might give them the opportunity to have work-life balance but that is yet to be determined.

2.12 Resource Constraints Theory

Franchising as a business model has been described in economic literature as a way of overcoming resource constraints (Hopkinson and Hogarth-Scott 1999). Franchisees can be the providers of resources to the franchisor (Alon 2001) through the payment of an initial purchase amount to start the franchise as well as ongoing royalties. Franchisors are provided with financial resources, while the franchisees also provide labour resources by operating their business (Stanworth et al., 2004).

The business equation of resource theory is that the franchisee provides the franchisor with almost guaranteed success, due to access to funds via front-end fees and ongoing royalty payments. In return the franchisee is provided with a business structured around what is claimed to be a proven format, with little chance of failure (Stanworth et al. 1998).

When considering resource theory it could be said that franchising is a second choice method for growing the business (Hopkinson and Hogarth-Scott 1999). The franchisor chooses this model due to the lack of access to adequate resources to grow

the organisation through company owned expansion and therefore, the next best option is to sell the formula and bring in franchisees (Wilkie, 2007). This requirement can be a short term or an ongoing growth model. However, as the franchisor becomes more financially stable, the need to franchise the business may decrease.

When an individual decides to buy a franchise they need to recognise the role they play in providing the resources to grow the franchisor's business. From an economic point of view they provide a significant input to the production process and therefore are vital in producing output and income. If the franchisee is providing all of these benefits to the franchisor they expect some sort of reward in terms of the proven business formula and support from the franchise system. The franchisee needs to determine if the benefits are significant enough to warrant the upfront costs and ongoing expense of royalties and other possibly unanticipated costs (Kaufmann 1999) such as restrictions on transfer of the franchise, operational controls, refurbishing sites to 'new looks', and even being restricted to specific hours of operation. Do the support mechanisms and the proven formula make it easier for the individual to be in business, or do they have to work much harder and earn a lot more revenue before they can earn an income for themselves? Does this then mean they have to sacrifice work-life balance just to earn the additional money to pay the royalties and fees, or does the proven formula make earning the money easier?

2.13 Comparison between franchised and independent business models

The decision to start a business instead of working for an organisation is based on many different factors but particularly the desire to be "one's own boss" (Felsted, 1994, p.50). Autonomy is believed to allow individuals to regain control and allocate time to the multiplicity of roles they wish to fill (Van Geldren and Jansen, 2006; Prottas, 2008; Gerber, 2001).

The choice of business model between independent and franchised options is another major decision. Individuals must decide whether to start a new business from

the beginning and develop a business model, or to follow a business formula as prescribed by a franchisor. There are many factors that will influence that choice. One of the main factors influencing the choice to buy a franchise is the perception that the formula will provide them with success (Stanworth et al. 1998). In exchange for this formula the franchisee will often pay an ongoing royalty to the franchisor (Grunhagen and Dorsch, 2003). The other aspect to being a franchisee is there is usually little provision to allow for innovation. The formula must be followed so that there is standardisation across the outlets. This could be problematic for entrepreneurial people.

The impact of the type of relationship that exists can have an impact on the business outcomes (Paswan and Young, 1999). An important criterion for the individual when making the decision about purchasing a franchised business is the support that is likely to be available to them as members of the system (Frazer, 2001; Kaufmann and Stanworth, 1995). If this is one of the key decision making criteria then it needs to be clear. If the franchisee has one expectation, and the franchisor has another, this could be a reason for conflict. This support is what encourages some people to enter into their own business when they might not otherwise make this decision. What is critical at this point is for the potential franchisee to determine exactly what support is available to them. Research has shown that there can be a gap between what support the franchisor offers, and what the franchisee expects (Morrison, 1996). This can be problematic for the franchisor-franchisee relationship as franchisees can question the value they derive from the relationship (Maritz and Neiman, 2008; Grunhagen and Dorsch, 2003).

A central tenet of the franchised business model is the minimisation of the financial and experiential risk for prospective business owners (Ruben, 1978). Lower business failure rates are often cited as a reason to choose the franchise business model (Stanworth et al., 1998). Needless to say, if there is a greater chance of success for the business, then it would be a reasonable choice to buy a franchise. This belief is not always correct as franchised businesses do fail (Kirby and Watson, 1999), although sometimes the failure is hidden as new franchisees might enter an existing location (Stanworth et al., 1998). Another problem for franchisees is that the franchisor's business might fail, adversely affecting the franchisee's business.

Women who intend to start a business often face challenges such as access to finance (Orban, 2001; Still and Timms, 2000) and access to business networks and mentors (Flinders University of South Australia, 1996). The structure of a franchise system might provide solutions to some of these issues for women (Weaven et al., 2007) as there is already an established network with the other franchisees, and some franchisors provide a finance scheme. This provides women with the opportunity to become entrepreneurial gradually. The support provided by the franchisor starts them in business and provides some of the support they might not have if embarking on an independent venture.

Some individuals (DeLollis, 1997; Buttner and Moore, 1997) start businesses without a franchise network, with great success. The desire to be independent in decision making, as well as being innovative, has its benefits. Additionally there are no royalty costs in an independent business, and there is the opportunity to offer a unique product as the exact business is not replicated multiple times (DeLollis, 1997).

The goals of having autonomy, control over flexibility, and being able to accommodate a variety of expectations (Smith, 2000), are some objectives that business owners seek, and apply to either of the chosen business models. There is a need for research into whether the work-life balance that these people seek by going into business becomes a reality. As summarised in Table 2.2 the choice of a franchised or independent business model can lead to different outcomes for work-life balance. Some of the reasons for establishing the business are very similar such as the desire to be self-employed, seeking the opportunity to be in control, and the possibility of improving financial outcomes. However there are certain factors which differentiate the choice of an independent or a franchised business. These include the perception of risk, the availability of support structures and level of autonomy. However, we do not know whether a franchised or independent business delivers superior work-life balance for the owner. The current research explores the relative importance of these factors.

Table 2.2 Comparison of factors affecting work-life balance for franchised and independent business

Factor	Franchise	Independent
Self-employment	Desire to be self-employed	Desire to be self-employed
Control	Desire to have control over decision making	Desire to have control over decision making
Financial rewards	Seeking financial rewards	Seeking financial rewards
Business model	Seeking standardised business model	Desire to be independent with business design
Risk (experiential and financial)	Perception of lower risk	Perception of higher risk
Systems	Seeking established systems	Desire to establish own systems
Support systems	Formalised franchisor key support as well as personal support networks	Informal individual personal support networks
Access to networks	Franchise system provides established network	No franchisee network
Autonomy	Compliance with franchisor requirements necessary	No franchisor compliance requirements

Source: developed for this research

Expectations are critical for all people who make the decision about whether to establish a franchised or an independent business. These expectations need to include: how the individual is going to operate the business, whether they are going to be able to regain the control they think they have lost, what type of support is necessary for them and where are they going to obtain it, what are their expectations with regard to staff, and what are the things that could impact on them financially. Although it is difficult to make these decisions it is the duty of the individuals to seek out the required information. They need to be as informed as possible and match the information to the expectations. Whether the individual had, or has access to adequate information, either for an independent or a franchised business, is yet to be determined, but the research will help uncover whether the expectations held were realistic, and if they were realised.

All of these factors contribute to whether the small business owner is able to achieve work-life balance, and whether it is more likely that they will achieve it in a franchised or independently owned business.

2.14 Research question and research issues

Work-life balance is a topic receiving a great deal of attention as a research agenda. Generally the emphasis has been on employees and how they can achieve this balance within large organisations. There is a body of research that suggests people leave large organisations and start their own business to regain control, if they are unable to achieve work-life balance within the confines of the organisational structure.

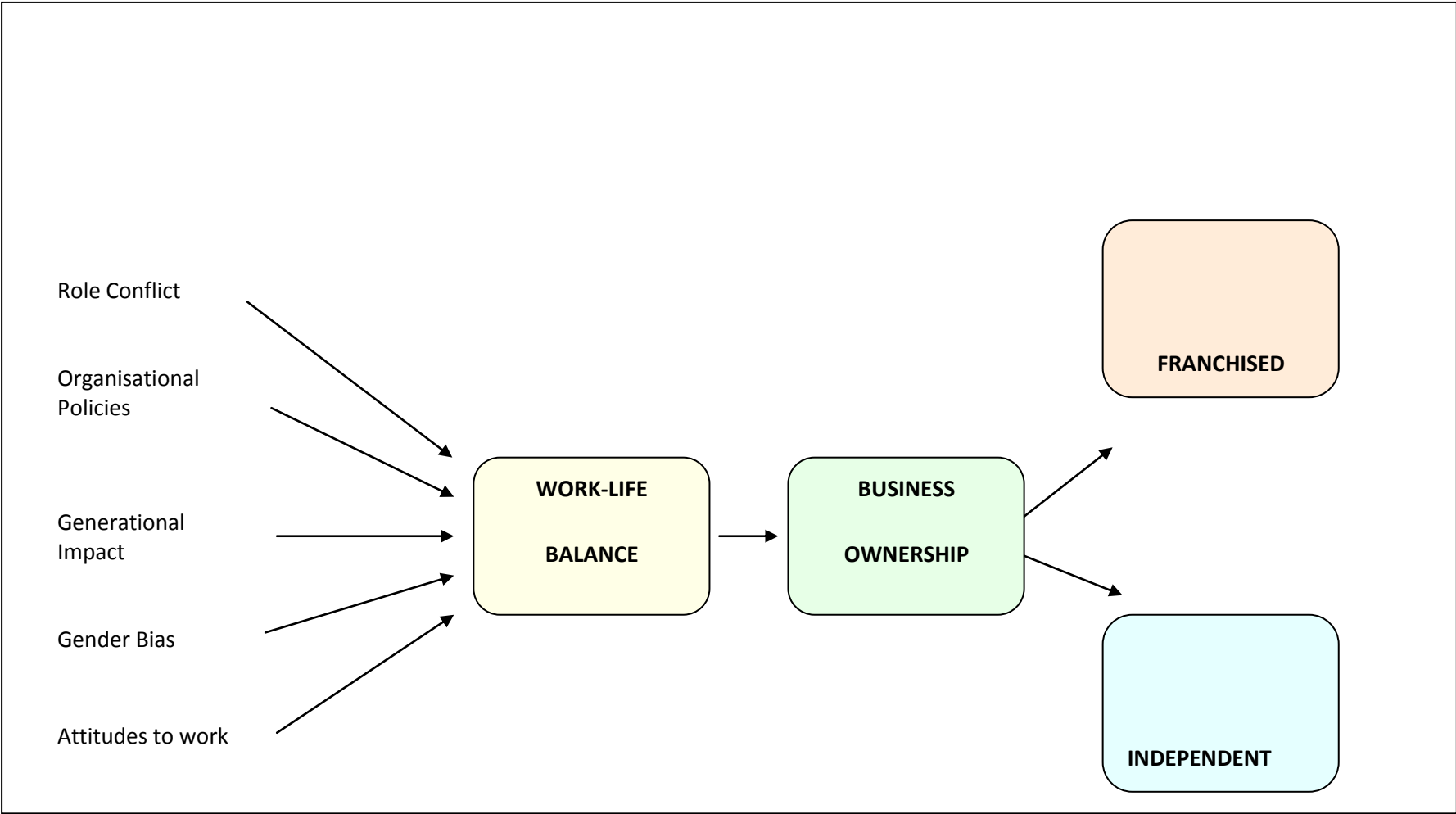
Based on the literature that has been reviewed it would be expected that certain factors would have significant influence over an individuals' ability to have work-life balance. One would expect to find that organisations can design work practices that allow people to allocate time to competing roles in life. Furthermore, there would be some indication as to whether accessing these policies affects careers. Gender based differences in attitudes and realities with respect to work-life balance should be identified. Although the literature does not identify differences specifically related to generational differences and work-life balance it can be seen that these can have an impact. It is expected that these differences will be significant in the research. The number of roles a person sees themselves as fulfilling, and the consequent role conflict, should be an influencing factor on work-life balance. Another area that should emerge is how people perceive the role of work in their lives, and whether they consider the amount of time spent working as a negative factor. Thus, one could expect that the research will show that for some people excessive work is not problematic and is related to the amount of satisfaction they derive from their work.

Another aim of the research is to explore the opportunity for people who enter into small business to achieve work-life balance. This will be investigated by considering whether they seek work-life balance, whether small business provides it, and whether a franchised or an independent business will provide better outcomes. As explained in the

literature review there is insufficient research that investigates this to date, so it is difficult to determine what to expect without analysis of the data.

Figure 2.2 Expected findings based on the a priori theory.

The following diagram illustrates the expected findings based on the a priori theory as presented in this chapter.



Based on the literature and the currently identified issues with respect to work-life balance the identified research question and associated research issues are as follows:

Research Question *“How and why does work-life balance differ between a franchised business and an independently owned (non-franchised) small business?”*

Research Issue 1a: *To what extent do individuals determine their work-life balance?*

b: *To what extent is work-life balance of concern to them?*

Research Issue 2: *How does starting a small business provide an opportunity for individuals to improve their work-life balance?*

Research Issue 3: *To what extent does small business ownership provide individuals with greater control over their lives?*

Research Issue 4: *To what extent does the business model (franchised vs. independent) affect work-life balance?*

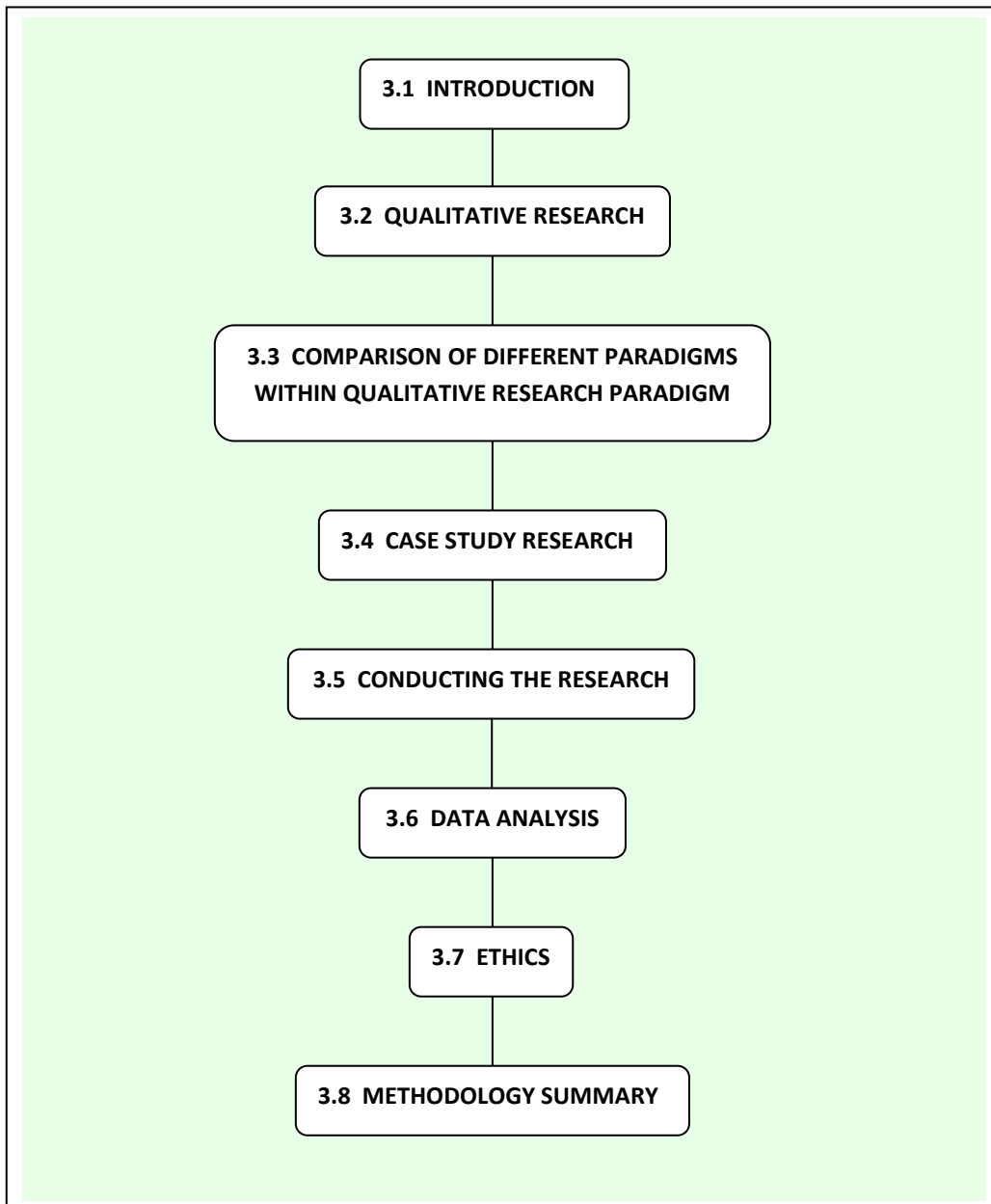
Chapter 3: Methodology

3.1 Introduction

A comparative study of work-life balance between different business models is best suited to a qualitative research methodology as the issues being investigated are not readily quantifiable and are subjective in nature. Furthermore, as the research question aims to investigate “how” and “why” work-life balance differs between the different business models (franchised and independently owned), it is more suited to a qualitative method. The problems addressed are descriptive in nature (Perry, 1998) as are the outcomes. Realism is the identified paradigm (Healy and Perry, 2000; Lincoln and Guba, 2000) as it allows for the investigation of a current, real world issue. The chosen method for data collection is case studies, which include a variety of data sources including in-depth interviews, personally administered questionnaires and interviewer observations (Fontana and Frey, 2000; Angrosino and Mays de Perez, 2000; Simon, Sohal and Brown, 1996). These techniques are accepted as being consistent with the paradigm and case study method (Healy and Perry, 2000).

The methodology for this project will follow the sequence as outlined in Figure 3.1. Following the introduction there will be a discussion of the features and suitability of qualitative research for this study. A comparison of several research paradigms will precede a justification for the use of the realist paradigm in this research. Case study method and the data collection tool to be used will be discussed. How the research has been conducted, including the practical issues that needed to be managed will be examined and the data analysis discussed. The ethical considerations and requirements will be outlined.

Figure 3.1 Summary of Methodology Chapter



Source: Developed for this research

3.2 *Qualitative research*

Two main methods of conducting research are quantitative and qualitative. Numerous factors differentiate these approaches and it is through consideration of these factors that one is able to determine the most suitable method for specific projects. The major reason for choosing a qualitative research methodology is the type of question being asked. This research is investigating a topic which calls for the participants' opinions, attitudes and feelings so as to gain an understanding of how and why work-life balance differs between different business models ((Malhotra, Hall, Shaw and Oppenheim, 2008). This understanding will be achieved based on the qualitative data collected from the participants.

Some other distinctions that would typically influence the choice between quantitative and qualitative research would be the amount of time and resources available (Hancock and Algozzine, 2006; Sobh and Perry, 2006). When these are limited, a quantitative approach would be preferable as the research tools are less time consuming and costly when collecting data. Access to subjects is also influential. If the researcher does not have access to the subjects being studied then the research tools typically used in qualitative work will not be effective (Carson et al., 2001). Furthermore, the type of relationship between the researcher and the subject under investigation needs to be considered. If a close relationship is required then quantitative research tools do not facilitate this approach.

Quantitative research aims to describe the general outcome rather than consider particular occurrences (Denzin and Lincoln, 2000; Hyde, 2000). Thus, if there is limited knowledge about the topic under investigation and the researcher is seeking a broad depth of understanding about varied issues, then quantitative instruments will not deliver suitable data. There is also a difference in the type of data that is produced. If the results are better communicated numerically then a quantitative approach is preferable. However, if the data are to be collected and represented in words then it is more appropriate to use a qualitative methodology (Miles and Huberman, 1994; Cepeda and Martin, 2005).

Therefore, it would be reasonable to use a qualitative method where there is little known about the research topic, it deals with a complexity of issues (Gummesson, 2006) and can be conducted over a longer time period. Furthermore, the researcher needs to have access to the subjects and have a rapport in order to collect a wealth of data that can be analysed and expressed in words (Denzin and Lincoln, 2000). The use of qualitative research provides the researcher with information about how the subjects think about topics, and also why they think it (de Ruyter and Scholl, 1998)

Qualitative methods are used in many different areas of research including marketing (Gummesson, 2005), management and the social sciences (Cassell, Buehring, Symon and Johnson, 2006), administrative sciences (Cepeda and Martin, 2005) and information systems (Walsham, 2004). Over the last 20 years the acceptance of this type of research has steadily increased with prestigious journals printing research papers using this methodology (Goulding, 2005).

Qualitative research can be conducted with different sample groups ranging from a single case to a large sample depending on the design of the project being undertaken (Dyer and Wilkins, 1991; Eisenhardt, 1989; Perry, 1998; de Ruyter and Scholl, 1998). Furthermore it can be said that quantitative studies are limited in the depth of investigation whereas qualitative research allows for a richer, deeper exploration of the more complex aspects of humanity (Hill and Wright, 2001,) and this can be achieved with a lot of detailed data collected from a small sample (Patton, 1991).

A simplistic view of qualitative research is that it does not involve the use of statistics and numeric measurements. However, it can be explained as the “techniques of data collection and analysis that rely on non-numerical data” (Cassell et al., 2006 p.162). These techniques are varied and include interaction with the subjects being studied with methods such as in-depth interviews, focus groups and personally administered questionnaires (Simon et al., 1996). Other data collection methods may not involve direct interaction with the subjects such as company reports, observation, and visual images (Hancock and Algozzine, 2006).

In a study that involves small business, and deals with quite personal issues, there is a requirement for the relationship between the two parties to be one of trust and

openness. Features of qualitative research will be explored as they further demonstrate why this is the most appropriate methodology.

3.2.1 Features of qualitative research

The following features of qualitative research indicate why it is the most appropriate method for researching how work-life balance might differ between franchised and non-franchised businesses. Miles and Huberman (1994) explain that the research is conducted through contact with a situation that is found to occur in real life. The researcher seeks to gain an overall view of the situation being studied and tries to glean information from within the situation as an observer would. The main aim of the task is to develop a meaning from the ways day-to-day activities are managed. Furthermore, there are many possible ways to interpret the data and most of the analysis is done with words as opposed to standardized instruments (Cassell, Symond, Beuhrig and Johnson, 2006).

There is a high level of fit between the above points and research that investigates the lives of individuals and how they manage to run a business, and carry out all the other activities they classify as 'life' activities. There is great benefit in conducting detailed interviews as they provide the opportunity to have contact with the candidates involved in the study (Dyer and Wilkins, 1991). The researcher is able to gain an overall view of the situation, to develop an insider's view, and try to give some meaning to the day-to-day activities. Interpretation of data presents challenges because there will be many different ways to view the information. Gummesson (2005) points out that this is one of the critical aspects to successful qualitative research. Due to the multiple data collection methods there is usually a wealth of information for the researcher to analyse (Eisenhardt, 1989; Miles and Huberman, 1994; Gummesson, 2000). It is vital that techniques are used to make sense of the data so as to be able to provide worthwhile outcomes. Outcomes will relate to the information that is sought in the data collection phase.

Due to the scope of the project it is very important to be clear with regard to the type of data that needs to be collected and to define the areas of investigation. For example, one must demonstrate that work-life balance is not just about hours of work which is quantifiable, but rather that there are many aspects of how the candidates feel

about the levels of commitment to various activities. The complex qualitative information collected seeks to give detailed information about the topic (Hyde, 2000) and will give an insight into not only how the individuals feel they are allocating their priorities, but also how they feel about the way they are allocating it. One needs to ask whether they are achieving a level of self-actualisation (Newman, 2005) through the achievements of running the business, which makes them more tolerant of what might be perceived by onlookers as unbalanced and excessive.

The issue of complexity is another one that can be addressed by the use of qualitative research. Internal complexity refers to the multi-varied realities that the qualitative researcher accepts, and external complexity is the structured and condensed way in which the results will be reported (Gummesson, 2006). The acceptance of the fact that this research project could be unstructured, leads the researcher to realise that this method is most appropriate. The most suitable paradigm for this type of project is the realist paradigm (which will be discussed in the next section), and the data will be considered through an interpretivist perspective. That is the data will be analysed and interpreted by the researcher to develop meaning from the research (Denzin and Lincoln, 2000).

3.2.2 Ontology and epistemology

One of the key assumptions about the qualitative research paradigm is that of *ontology* (Denzin and Lincoln, 2000). When considering ontology it is necessary to think about how individuals view their world and how they interpret the realities they perceive (Lincoln and Guba, 2000; Carson et al., 2001; Hill and Wright, 2001). It is because all individuals have different perspectives and experiences that we have different ways of viewing situations. It is common for people to make decisions based on previous experiences, or on information they may have that can bias them in one direction or another (Bazerman, 2006). This can affect the perception of reality, or how we deal with it, in that the participants involved in a research project will create their own reality (Hill and Wright 2001). In fact it can be said “ontology is the ‘reality’ that researchers investigate” (Healy and Perry, 2000 p. 119).

There are different views of ontology. The positivist view of research is that the reality being observed can be separated from the person who is making the observation

(Carson et al., 2001), whereas researchers in other paradigms, such as constructivism and realism, recognise that they participate in the real-world, and for the events they are studying it is critical to have this involvement (Healy and Perry, 2000). The interpretivist researcher believes the reality and the researcher are inextricably linked (Carson et al., 2001; Weber, 2004). This research tends to be subjective in nature as candidates reveal very personal thoughts and feelings about a topic under investigation. However, there are also some aspects which tend to be more objective in nature, such as certain questions for example business hours of operation, which are asked in one phase of data collection, thus including the human context with the objective aspects of the research (Gummesson, 2006). It is the blending of the subjective with some objectivity that enhances the interpretation of the data, as the researcher and the subject has to renegotiate his/her meaning, due to the influence of certain objectivity (Weber, 2004).

With this type of research there are several realities involved including the researcher, the subjects and the reader (Hill and Wright, 2001). There are few people who would not have an impression about what work-life balance means to them, how they might view other people's opinions or how they view their own situations. Thus, it becomes clear that one must be aware of the possible influence of these realities on the research outcomes. A discussion about validity and reliability (in Section 3.6.3) will explain the measures taken to minimise the impact of this bias, although Eisner (1985) supports the idea that there is value in recognising people and their influences in research.

Weber's (2004) comparison of ontological positions considers positivism and interpretivism. The current study falls into the interpretivist ontology as this ontology includes a range of research paradigms which are of a qualitative nature and are "non-positivistic research approaches" (Carson et al., 2001 p. 8). The way of viewing the world in this case, is through the eyes of various people including the participants, the researcher, and the readers (Gummesson, 2006). The concept that is being investigated in this thesis involves a contemporary issue that has real world implications, and although subjective in nature, the factors influencing work-life balance can fall outside the business owners' sphere of influence.

Epistemology is the theory of knowledge and considers if it really exists with respect to the methods and validation undertaken in order to develop that knowledge. It is the investigation of what differentiates opinion from justified belief (Gummesson, 2000). The epistemological question is to determine how the researcher, the subjects and the methodology interrelate (Denzin and Lincoln, 2000; Hill and Wright, 2001; Healy and Perry, 2000; Towers and Chen, 2008). Positivists view their research as objective and separate themselves from the topics under investigation (Healy and Perry, 2000; Cassell et al., 2006). It is recognised by interpretivists that the knowledge they create is influenced by their experiences, their heuristics, and the goals they set out to achieve (Bazerman, 2006; Weber, 2004; Cepeda and Martin, 2005).

For the researcher working in the realist paradigm the epistemology includes subjectivity and some objectivity as real world issues are investigated; hence the relationship includes an objective reality (Perry, et al., 1999). Therefore, research into the concept of work-life balance is one that would be influenced by the subjects' feelings about how they perceive their own situations. Additionally there are factors in the external environment such as the labour market, shopping centre requirements, supplier issues and franchisor requirements that will influence the research (Sobh and Perry, 2006). Hence, the epistemology is consistent with realism. Due to the introduction of these economic and environmental factors, that are the influences of the real world, that there is a move towards the realist paradigm (Healey and Perry, 2000).

The following discussion will provide a paradigmatic comparison in order to provide a justification for the chosen paradigm.

3.3 Comparison of different paradigms within qualitative research methodology

The approaches to theory development range over a spectrum of inductive theory building and deductive theory testing (Romano, 1989; Carson et al., 2001; Towers and Chen, 2008). The *inductive* approach is used for the development and construction of theory (Reige, 2003) and it is aligned with the realist paradigm of research. The *deductive* approach relies on theory testing, requiring prior theory to test (Perry et al., 1999). It is associated with the positivist paradigm (Perry, 1998). On the continuum from

inductive theory building to deductive theory testing there are many research paradigms. Grounded theory (Glasser and Strauss, 1967) is at the extreme of induction and proposes that the researcher enters into a project with no prior theory, whereas, deductive theory testing relies on prior theory (Carson et al., 2001). Other paradigms, including realism, tend to include a mix of induction and deduction as they recognise the existence of prior theory and the development of new, except for positivism which is purely deductive (Towers and Chen, 2008).

A paradigm is a set of assumptions, concepts, values and practices that constitute a way of viewing a reality (Deshpande, 1983). Several paradigms have been identified by theorists (Cepeda and Martin, 2005; Miles and Hubberman, 1994; Denzin and Lincoln, 2000). Healy and Perry (2000) cite four; positivism, critical reality, constructivism and realism. Each will now be discussed in relation to the current research.

Positivism is best suited to objective, quantitatively measured research, and the research methods rely on experiments, surveys and field studies where the researcher and the subjects are separate (Weber, 2004). This type of research tends to measure causal relationships with few variables, and there tends to be a body of prior knowledge that is being tested (Weber, 2004; Perry, Reige and Brown, 1999).

The topic of work-life balance in small business models is as yet a largely uninvestigated concept. It includes many variables including the business type, structure, customers, other stakeholders, and the many perceptions of the subjects involved. This complexity and the multivariate nature of the research indicate that the positivist paradigm is inappropriate in this case. The research is not aimed at theory testing, rather it is aimed at seeking data and interpreting it, in order to make sense of a contemporary issue.

The *critical reality* and *constructivism* paradigms are interpretive approaches to qualitative research which assume knowledge is generated through the experiences of people (Lincoln and Guba , 2000; Sobh and Perry, 2006). They try to make sense of the world by considering the data they collect and examining it through the framework of their “life-worlds” (Weber, 2004 p. vi). The aims of critical theorists include analysing, evaluating, and changing a multiplicity of values, including those of social, cultural and

political influence (Healy and Perry, 2000). There tends to be a focus on the concept of domination. Research projects in this paradigm tend to be longitudinal and ethnographic with an historical view which seeks to understand the issues of domination as is seen in feminist writing (Creswell, 1998).

The issues associated with work-life balance in small business do not fit with the critical reality paradigm, as the study is intended to examine current issues for both franchised and independently owned small businesses with a view to developing an understanding of the situation. There is no doubt that there are social, cultural and political aspects to this research, however the researcher does not seek to bring about societal change with the results of the study. The aim is to assist the individual to manage within his/her situation. The aim is not to change the structure or power balance within organisations.

The constructivism paradigm seeks to uncover the ideologies and values that underpin findings (Healy and Perry, 2000). According to Guba and Lincoln (1994) the researcher has to be involved to the extent that they become a “passionate participant” (p. 112). This paradigm is used in a purely subjective context and does not consider the impact of economic and environmental factors that could be influencing the research (Healy and Perry, 2000). The research being undertaken will be influenced by external factors and is not solely based on the individual’s choices.

Although the critical reality and constructivism (Lincoln and Guba, 2000) are not suitable for this research project, it is important to recognise the influence of interpretivism on this work. According to Gummesson (2003) all research has an element of interpretivism. He points out that throughout all aspects of a research project there is subjectivity including the selection of the topic, the research methods, the data collected, the selected data to be used for analysis, and the way in which the results are interpreted. Based on this viewpoint it would be reasonable to propose the matter of work-life balance in small business would have a degree of subjectivity, as well as an aspect of interpretivism in the conduct of this project.

3.3.1 Selection of Realist Paradigm

Realism is the preferred paradigm for this research as it seeks to investigate the real world and contemporary issues (Perry 1998). Its pre-paradigmatic nature allows for the development of theory, although realism does recognise there is some researcher objectivity. The objectivity of this research stems from the fact that there are some existing theoretical frameworks. Realism also allows for the research of unobservable phenomena (Hunt, 1991), because as one cannot always observe how someone feels about something. Uncovering unobservable data can occur during the interview phase of data collection when interviewees explain how they feel about a variety of topics. Due to the fact that there is an external reality (Tsoukas, 1989; Lincoln and Guba, 2000) and there is a complexity of information it necessitates the triangulation of data (Alam, 2005; Bonoma, 1985) to facilitate observations of that reality. This triangulation occurs through the collection of multiple and separate data sources per case (Stake, 2000; Carson et al., 2001) such as the use of questionnaires, interviews and interviewer observations.

The current research being conducted includes a variety of complex issues, for example, the blurring of the boundaries between work and life (Lewis, 2003). Thus, to uncover useful information the subject might require prompting and probing by the researcher, before reflecting on the situation. This prompting could come from asking questions regarding the current and anticipated situation for their work-life balance, thus encouraging the subjects to reflect more deeply about their lives and their personal choices. The investigation will be focused on interpreting what the participants are experiencing with their work challenges on a regular basis, as well as how they feel about these experiences. These investigations have been designed, based on the prior theory as discussed in the current literature. The frequency with which the issue of work-life balance is raised in the popular media, and the emphasis that organisations such as IBM are placing on this concept, indicates an area worthy of investigation (Hill et al., 1998).

Another significant aspect of this research project is its focus on small business. Small firms, irrespective of their definition, make up a significant quantity of the total number of enterprises in all economies (Storey, 1994). What is happening in these

businesses is a contemporary issue and one that is impacted not only by the participants within the business, but also by factors external to them.

Although realism is the identified paradigm it is important to recognise that the boundaries are not always definite (Lincoln and Guba, 2000). As Goulding (1999) explains there are many challenges in clearly distinguishing one paradigm, as a degree of overlap exists. Many of the paradigms in the qualitative research method use similar data collection tools such as interviews (Miles and Hubberman, 1994; Yin, 2003; Eisenhardt, 1989). The overall picture of the ontology, epistemology, the research issues and how the data are analysed will indicate to the researcher the most suitable paradigm (Denzin and Lincoln, 2000). In the case of the current research the analysed data will provide insight into a current, real world issue. There will be a small element of interpretivism in the way the data is viewed and analysed (Gummesson, 2000) and even in the selection of the multiplicity of issues that will be given priority in the presentation of results. Based on the topic under investigation, the subjective/objective nature of the data, the influence of the prior theory (albeit limited) (Eisenhardt, 1989; Healey and Perry, 2000), the use of case study methods for data collection and the analysis of the data which will be reported in words as opposed to numbers, this project fits within the realist paradigm.

Realism has been identified as a suitable paradigm for case study research and a discussion of the selection of case studies as the best method of research will follow.

3.4 Case study research

3.4.1 Suitability of case study research

Conducting case studies is the most effective and suitable method of data collection for this research as it is suited to topics that investigate contemporary, real-life issues (Grunbaum, 2007; Burns, 1994). The case study's unique strength is the ability to deal with a variety of evidence beyond what might be available in more limited forms such as retrospective study. It allows the researcher to maintain a holistic view of the real life events that are being investigated (Yin, 2003).

The technical definition of a case study as provided by Yin (2003) is that a case study is an empirical enquiry that focuses on investigating a contemporary phenomenon within a real-life context which has ill defined boundaries. It is a method that allows for dealing with situations that include a multiplicity of variables. It uses many different data sources that are collated to examine these variables and these sources are used to triangulate the data to increase its validity (Bonoma, 1985; Alam, 2005; Cepeda and Martin, 2005). The data collection and analysis techniques are guided by the prior theory used in the development of the project.

Work-life balance is an issue that has attracted a lot of media attention. For example, there has been discussion about the incompatibility of professional life and personal life (Towers et al., 2006). The challenges of attracting and keeping staff in organisations, if they are dissatisfied with working conditions (Lewis, 2003), have been discussed in the popular press frequently. These examples indicate a good fit between the topic and the methodology. The fact that these matters are discussed regularly in the popular media demonstrates that the issue is contemporary, and relates to real-life situations.

Case studies provide the opportunity to conduct research that retains an *holistic* view of the events being investigated, and at the same time provides the researcher with data from real life situations that can lead to the formation of concepts and propositions (Gummesson, 2005). This study is one that not only lends itself to this type of investigation but actually requires an holistic view of real-life events. The basis of the investigation is to determine whether one or the other business model allows for the individuals involved to have a different work-life balance. As alluded to previously, the issues raised in the case studies will involve all aspects of the participants' lives, as well as the lives of the people with whom they interact.

Case study research is used predominantly for the purpose of inductive *theory building* although it does include some deduction based on prior theory development (Perry, 1998; Yin, 1994). The information researched in the literature review indicates that there is prior theory with respect to work-life balance (Lewis et al., 2003; Markincus et al., 2007; Porter, 2004; Rayman et al., 1999), and also comparative data for franchised and non-franchised businesses (Stanworth et al., 1998; Watson and Kirby, 2004). This information guides the researcher in the direction for further study (Cepeda and Martin,

2005). However, as there is a paucity of information about work-life balance for small business owners (Shelton, 2006; Daniel, 2004), specifically in the coffee shop sector, one is able to assume that the project will be inductive, as new theory will be developed through the research.

Case studies can be exploratory, descriptive or explanatory (Yin, 2003; Grunbaum, 2007). The most appropriate of these for a research project is determined by considering the type of question being asked, the amount of investigator control over events, and how contemporary are the events under investigation. *Exploratory* research is used to define a research question or to determine whether a research project might be feasible or not (Hancock and Algozzine, 2006). Therefore, this design is more often used for initial study undertaken prior to the conduct of a full research project for example the use of a pilot study. This type of research typically asks 'what' questions (Yin, 2003, p.5). *Descriptive* research designs are used to fully describe phenomena within a specific context (Hancock and Algozzine 2006). An *explanatory* case study is one in which asks a 'how or why' (Yin, 2003, p. 6) question, there is no behaviour control, and the events are current. Hence, as this research asks a how and why question and is about a current and popular issue over which the researcher has no control, the full research project can be called an *explanatory* case study.

The aim of conducting case studies is to seek sufficient information from a variety of collection methods such as interviews, observations and questionnaires (Weerd-Nederhof, 2001; Yin, 2003; Hancock and Algozzine, 2006) to gain an in-depth understanding of the situation and the required data for analysis. The use of case studies as a form of inquiry will be suitable for this study as it copes with situations where there are many variables of interest, and multiple sources of evidence which will require in-depth investigation (Yin, 1994).

Case studies are not accepted universally and have been criticised for a variety of reasons. The area of greatest concern has been over the lack of rigour (Cepeda and Martin, 2005) which occurs if researchers are lacking in discipline, have not followed good practice, or allow their own biased views to influence the outcomes (Yin, 2003). In order to manage quality and overcome the perceived limitation of poor rigour it is extremely important for the researcher to design a well thought out project (Eisenhardt, 1991; Alam, 2005; Seuring, 2008; Peters and Howard, 2001). Careful consideration of

the literature prior to determining the research question, as well as planning the most appropriate data collection methods to ensure the correct information is collected, is essential.

Another concern with case study research has been the inability to *generalise* from one case to the broader population (Yin, 2003). Case study research in realism has analytical generalisability but not statistical generalisability (Carson et al., 2001). As case studies can be conducted with a single case (Dyer and Wilkins, 1991; Yin, 2003) the sample is often small and, in terms of the number required for positivist research, it can appear to be limited. However, it needs to be recognised that although the outcomes might not be able to be generalised to the population, they can be related to existing theory (Yin, 2003). The case study is most suited to where the researcher is trying to find themes and apply those themes to current thought, with a view to extending the knowledge about the issue under investigation. It is not generally aimed at testing a theory to determine right or wrong.

The third concern is the time it can take to conduct the research and the resultant quantity of information collected (Yin, 2003). This criticism stems from the fact that the data collection tools can be time consuming and these tools result in a large amount of data to be analysed. It is important to be specific in what information is to be collected and over what period of time. The nature of this research is to allow for the collection of deep and meaningful data, and the collection process of interviews can lead to a large amount of information; however, it is important for the researcher to be selective in how much data is collected. There are suggestions of how many cases might be needed for different types of projects (Perry, 1998), but it is up to the researcher to determine when there is sufficient data. Collecting sufficient data can be determined by recognising a point at which no new information is being revealed (Eisenhardt, 1989). Furthermore, it is important to collect sufficient data, which is comprehensive enough, to produce useful and credible results (de Ruyter and Scholl, 1998).

Conducting good case study research requires the researcher to plan and design the project with careful consideration of the research question and the view to generating worthwhile outcomes (Alam, 2005). The aspects of design will now be discussed.

3.4.2 *Sample selection*

The selection of a sample is the process of including sufficient cases in the study that the sample may be studied and the information from that group will be reflective of the population (Cavana, Delahaye and Sekaran, 2001). In case study research there is no predetermined figure for the correct number of cases for specific studies (Gummesson, 2000).

Purposeful sampling can be used to quickly determine if the respondents are going to provide the rich and useful information required in the study (Alam, 2005; Cavana et al., 2001; Gummesson, 2000). Thus, the primary sample for study in this research is made up of owners of franchised and independently owned small businesses. The aim is to conduct a comparative study of these two groups to investigate how work-life balance is different for owners of the two business models. The subjects will be selected as they cover a cross section of demographics, such as single males and females with and without children, and married couples with or without children. These groups are likely to have different work-life balance challenges and therefore will generate different data. The sample will also include business owners from regional and urban locations as the location of the business might impact on work-life balance.

The aim of selecting multiple cases which are different in some ways but similar in others is to ensure replication (Eisenhardt, 1989; Yin, 2003; Sobh and Perry 2006; Miles and Huberman, 1994; Hyde, 2000). *Replication logic* (Yin, 2003) provides a robustness to the case study methodology giving the researcher the opportunity to examine and compare the outcomes of individual cases, thus allowing for richer theory building (Carson et al., 2001). *Theoretical replication* occurs when cases are selected which are likely to give differing results for predictable reasons and *literal replication* will occur when cases are likely to produce similar results for predictable reasons (Yin, 1994). Replication logic is used in case study research in a similar way multiple experiments would be used in a quantitative study (Carson et al., 2001). The aim is to consider each case as a separate experiment that can be compared to the next case, thus providing the opportunity for cross case analysis, and promoting greater confidence in the results (Eisenhardt, 1989; Eisenhardt, 1991; Hubbard and Armstrong, 1994).

Replication logic for this research has been considered on three different criteria: the business model, the ownership structure and the location. Theoretical replication is expected to occur with the difference between franchised and independent models and between respondents with children and those without. Literal replication is anticipated to occur where there are similarities amongst respondents. Similarities include those in the franchised group, the independent group, those with children and those without. Table 3.1 illustrates the theoretical and literal replication of the cases. Individual quadrants show cases where there is literal replication as each case has similar characteristics. Cross quadrant comparison illustrates theoretical replication as those cases have different characteristics. The case selection was intentional so as to provide the researcher with sufficient depth of data to be able to show how various external factors might impact on the respondents' work-life balance.

Table 3.1 Literal and theoretical replication (Yin, 2003) based on business model and dependent children

Variable (dependent vs no dependent children theoretical)	Franchised	Independent
Dependent children (all dependent literal)	Fra3, Fra5, Fra6, Fra7, Fra8, Fra9 Fra10	Ind2, Ind3, Ind5, Ind7, Ind8, Ind10
No dependent children (all no dependent – literal)	Fra1, Fra2, Fra4	Ind1, Ind4, Ind6, Ind9

Developed for this research

The number of cases that will be sufficient for the analysis is also open to interpretation. According to Eisenhardt (1989) the number of cases will be determined by the presence or absence of new theory development. Perry (1998) recommends that up to 15 cases be studied with about 3 interviews per case. Miles and Huberman (1994) indicate that more than 15 cases may generate too much data that will ultimately lead to difficulties with analysis. The quantity of cases suggested usually includes more than one interview

per case, and possibly up to three (Perry et al., 1999). However, this approach could prove difficult when researching small businesses (Carson et al., 2001) due to time and resource constraints. Therefore, this research will include 20 cases with a minimum of 3 data sources per case in order to ensure sufficient data collection. The aim is to ensure quality without generating so much information that it becomes too difficult to analyse.

In this thesis it was proposed to include up to 10 franchised and 10 independent cases (including the data from the pilot cases). In total the research includes 20 cases. All of the participants were interviewed once and half of each group had follow-up interviews. The research has 70 data sources in total including 30 interviews, 20 personally administered questionnaires and 20 interviewer observations. Subjects will be from Queensland and the franchisee and independent pairs will be from coffee shops that are located in close proximity, so as to control extraneous factors.

3.4.3 Data collection methods

Yin (2003) suggests that the most suitable methods of data collection will be determined by three conditions:

1. The type of research question
2. How much control the researcher has over the behaviour of the events
3. How much the focus is on contemporary rather than historical events.

The research question is a traditional “how does” question. The researcher has control over events such as how the research is conducted and interpreted. However, there is no control over the *issues* being researched. The candidates are in control of their own situations and the researcher is merely inquiring about these. The events being researched are contemporary. Thus it would appear that case study design is suitable for this project.

It is widely agreed that qualitative research requires a variety of data collection tools (Hill and Wright, 2001; Simon et al., 1996). The main methods of data collection for this project will be a personally administered questionnaire, an in-depth interview, and interviewer observation of the candidate and the circumstances surrounding the interviews. The use of these three data sources completes the triangulation that is

recommended in realism research (Alam, 2005; Richardson, 2000; Healy and Perry, 2000). The use of a pilot study prior to conducting the full research project can be beneficial in testing the data collection tools to ensure the correct information is collected.

3.4.3.1 Pilot study

The first two cases were run as a pilot study (Alam, 2005; Yin, 1994) providing not only preliminary information but also helping with the selection of suitable candidates for the study. The purpose of this pilot study was to test a respondent from the target sample and then follow up the pilot with the full study which will be based on further questionnaires and in-depth interviews, which will now be discussed. The pilot case can be the most difficult of all because it is the first one conducted, and will indicate to the researcher whether the instruments that have been designed are suitable to collect the required data. Furthermore, the pilot provides the researcher with the opportunity to redesign the tools, if necessary, based on the feedback received (Yin, 2003).

Due to the nature of case study research there is a potential for the researcher and the subject to become quite involved, leading to a rather subjective interpretation of the data. However, this should not happen in the realist paradigm as the researcher is somewhat removed from the respondents' reality and is guided by prior theory (Perry et al., 1999). Therefore, to decrease the likelihood of this issue occurring, the researcher should use multiple sources of evidence (triangulation) and should continually create a chain of evidence (de Weerd-Nederhof, 2001; Sobh and Perry, 2006). This research includes three data sources - a questionnaire, interviews and interviewer observations - which will provide multiple sources of evidence.

3.4.3.2 Personally administered questionnaire

The use of personally administered questionnaires is to seek an overview of the subject's thoughts on work-life balance and the reasons the type of business model was chosen. The use of this type of data collection method facilitated the development of the primary research design in that predominantly open ended questions were used. While the information collected in these questionnaires was not part of the interview process, it helped the interviewer to develop the appropriate questions for the in-depth

interviews (Perry, 1998; Yin 2003). The purpose of questionnaires is the opportunity to clarify the most important questions to ask in order to obtain the most suitable information for conducting the research. A copy of the questionnaire is in appendix 1.

3.4.3.3 *In-depth interviews*

An interview is a verbal exchange of information between individuals, often face to face, during which the interviewer tries to elicit information from the interviewee (Fontana and Frey, 2000; Burns, 1994). The in-depth interview is guided by an interview protocol (Alam, 2005) yet it sometimes becomes more of an unstructured interview where the interviewee is encouraged to speak freely about the topic being discussed. It tends to be more of a conversation between the parties and one that will often focus on the interviewee's personal experiences (Burns, 1994).

The interview consists of mainly unstructured questions but may also include some probe questions to clarify understanding (Perry, 1998; Hancock and Algozzine, 2006; Dyer and Wilkins, 1991). Both of these techniques will encourage discussion as well as help build the relationship between the parties. Furthermore it will encourage the subjects to elaborate on the levels of satisfaction or frustration they are feeling with their selection of business model, in providing an opportunity for work-life balance. Ultimately the aim of the questions is to encourage the interviewees to tell their stories, and in doing so the data will emerge (Perry, 1998).

Interviews were conducted with all of the owners of the businesses to enable different perceptions to be included in the data collection. It is possible that each subject may view the situation regarding work-life balance differently due to the gender differences that have been identified (Noor, 2004) or because of different definitions of work and life (Lewis, 2003).

The detailed information derived from the in-depth interview can be further narrowed into more specific themes, if required, by the use of case analysis. Thus, each case is analysed separately before cross case analysis is undertaken allowing the researcher to determine if any themes need to be pursued in greater depth (Carson et al., 2001; Eisenhardt, 1989; Simon et al., 1996). Whether this is necessary will be determined as the interviews progress, which is one of the benefits of case study

research, as there is a variety of tools that can be used to ensure that sufficient and reliable information is obtained (Perry, 1998).

3.4.3.4 Interviewer observation

Observation may be conducted either formally or informally. Informal observation may occur during other forms of data collection such as interviewing (Yin, 2003). Unlike data that are collected from the subject through interview or questionnaires, observation may provide more objective information (Hancock and Algozzine, 2006) as it is derived from the researcher's viewpoint.

Hancock and Algozzine (2006) identify five factors that need to be considered when undertaking observation in order to maximise its benefit. They are as follows:

1. Identify what requires observation.
2. Create an observation guide similar to an interview schedule.
3. Ensure access to the subject requiring observation.
4. Recognise the researcher's personal bias in the observation.
5. Maintain legal and ethical requirements during observation.

The above requirements can apply to both formal and informal observation and provide a framework for ensuring that the best quality of data can be collected. The observations for this research included the way the candidates responded to the interview, as well as any issues that arose whilst trying to arrange appointments (Gummesson, 2000).

The selection of correct data collection tools is of significant importance. The process of ensuring the quality of the data is managed by implementing good quality control. The next section will discuss validity and reliability and how these need to be addressed to ensure the quality of the data collection process.

3.4.4 Reliability and validity

Tests for reliability and validity are used in all research to ensure the quality of the research findings. There are obvious differences between quantitative and qualitative

research but the desired outcome from both forms is to have results that can be trusted. The concepts to be discussed are reliability, construct validity, internal and external validity (Burns, 1994; Perry, 1998; Hill and Wright, 2001; Miles and Huberman, 1994). These concepts have typically been associated with quantitative research but have been adapted so as to be suitable for qualitative research. Alternative concepts have been developed that are more closely aligned with qualitative research methodology; namely dependability, confirmability, credibility and transferability (Robson, 1993; Miles and Huberman, 1994). These concepts and their applicability to this research will be discussed with the more traditional concepts. Figure 3.2 will summarise the discussion and how these requirements have been ensured for this thesis.

3.4.4.1 Reliability

Reliability in qualitative research has been described as the potential loss in quality of the research that can be avoided in the data analysis phase (Rust and Cooil, 1994). In quantitative research reliability is determined by the relative absence of errors in the measuring instrument, whereas qualitative researchers view reliability as the fit between the data collected and what actually occurs during the course of the study (Burns, 1994). When considering the reliability of a study one is determining how dependable the work is. If the same work was conducted today and then again tomorrow, would the results be replicable, and thus, is it possible for researchers to rely on the results? This should apply for quantitative as well as qualitative research.

Tests of reliability are more easily applied when examining easily quantified criteria such as how many hours an individual spends at work. However in the case of multiple criteria, which is typical of qualitative research, reliability is somewhat more challenging to incorporate into the study. There are many variables that need to be measured when asking more qualitative questions such as “how do you feel about the amount of time you spend at work?”

An aspect of reliability in case study research is accepting that the number of cases required is not predetermined, and that the sample will self-limit when saturation of information has occurred and no new information is forthcoming with additional interviews (Gummesson, 2006; Perry, 1998). To improve reliability it might be necessary

for the interviewer to explain the role he/she has played in the data collection including the relationship with the interviewee. There is also a requirement to explain any preconceived ideas of the situation that the interviewer might hold so that any bias is acknowledged (Hill and Wright, 2001). Reliability will occur if specific techniques are included in the study, from the research design to the data analysis stage. Consultation about the findings with two experts was used in this research to enhance reliability. One was an industry expert in the field of marketing channels and the other was an academic who specialises in analysis of qualitative data.

Dependability is regarded as an alternative to reliability (Miles and Huberman, 1994; Golafshani, 2003) and it is aimed at demonstrating stability and consistency in the processes used in conducting the research. To ensure dependability the researcher needs to determine whether the questions that have been set are suitable for the research, and has care been taken with the design. The next consideration is validity.

3.4.4.2 Construct validity

There are three aspects to validity that require consideration during the research: construct validity, internal validity and external validity. The aim of construct validity is to put in place adequate operational measures for the theoretical concepts that are to be researched (Reige, 2003). A construct is a quality which can show something about human behaviour (Eisenhardt, 1989; Burns, 1994). Therefore, when examining how one feels about an issue, it is possible to examine the construct of 'satisfaction' and the feelings of satisfaction about the situation individuals are in.

The concept of *confirmability* as used for qualitative research, is an alternative test for construct validity. The aim of the test of confirmability is to determine whether the interpretation of data is unbiased and logical, and that the conclusions drawn from that data are the most reasonable (Reige, 2003).

3.4.4.3 Internal validity

Internal validity is related to the cause and effect relationship used in scientific research (Gummesson, 2005). However, the application of internal validity to case study research requires the use of generative mechanisms that will lead to substantive ways to make

inferences about real life experiences under observation (Reige, 2003). The researcher is not only in the position to make observations about the patterns observed, but he/she has the opportunity to analyse and make assumptions about what led to them.

For the researcher to ensure internal validity he/she must recognise the study is inductive and that theory is being developed as the research progresses. The cause-effect relationship that is typical of scientific research is not easily demonstrable with this research method, and therefore, the requirement is to seek the 'why' in the relationships being discussed (de Weerd-Nederhof, 2001).

Credibility is the alternative test used for internal validity in qualitative research and it relies on the approval of research findings by other individuals, including interviewees or peers (Reige, 2003). The purpose of this test is to ensure the data and findings are plausible.

3.4.4.4 External validity

External validity is concerned with the ability to take the results of a study and apply them to a more generalisable context. Using measures to improve external validity helps improve the comparability and translatability of the study to other situations (Burns, 1994). To ensure external validity in case studies, the requirement is to be able to develop analytical generalisations and extrapolate them to the broader theory (Janesick, 2000; Miles and Huberman, 1994; Reige, 2003). A technique that can be used to facilitate this, is replication of logic in multiple case studies (de Weerd-Nederhof, 2001).

The alternative concept for external validity that applies to qualitative research is *transferability* (Reige, 2003; Golafshani, 2003). The application of this test is to demonstrate that the findings can be transferred amongst similar or different findings. In addition, the external validity of the data would be further enhanced by limiting the research to one type of business, as that minimises variables such as product type, cost pricing structure, and customer type. This would create a body of knowledge about this sector that could then be extrapolated to other sectors with similarities.

Furthermore it is proposed that it will not be too difficult to find locations where both types of business model are within close proximity, which should add to the

accuracy of the comparison. Thus, the lack of comprehensive research on a comparison of work-life balance between franchised and non-franchised coffee shops leaves a gap in our knowledge. As the stated objective of so many individuals for going into business is to improve control over their lives, it is important to see whether this is actually what is achieved. Figure 3.2 has been adapted from Reige (2003) and outlines the tests and techniques for different design tests. The terms included in Fig. 3.2 are those used for quantitative research, as well as the terminology that has been adapted for qualitative research. The final column describes the measures taken by the researcher to ensure the quality of this research in accordance with the measures outlined. The data that is collected will be subject to appropriate analysis in order to determine the answers to the research issues and the research question. A discussion on how the research was conducted will follow, including an explanation of the criteria for case selection, pilot study procedures, questionnaire procedure, interview procedure and conducting observations.

Figure.3.2 Tests and techniques for different design tests

Case study design tests	Case study technique	Qualitative design tests	Qualitative technique	Techniques used in this study
Construct validity	Multiple sources of evidence, chain of evidence. Have key informants review draft case study report	Confirmability	Confirmability audit (look at the data findings,)	Conduct pilot study, questionnaire, and in-depth interviews, interviewer observations
Internal validity	Do within-case analysis, ensure internal consistency of findings	Credibility	Triangulation, self-monitoring	Multiple data sources. Self-monitoring and discussion with supervisor, use of NVivo software
External validity	Use replication logic in multiple-case studies, define scope and boundaries of reasonable analytical generalisation for the research , compare evidence with extant literature	Transferability	Predetermined questions, thick description (develop case study data base), cross case analysis, specific procedures for coding and analysis	Purposeful sampling, research design. Predetermined questions, questionnaire and interview protocol, internal case analysis, cross-case analysis
Reliability	Explain theories and ideas, assure congruence between research issues and features of study use case study protocol, use multiple researchers, use good case study research methods	Dependability	Dependability audit (examine and document the process of inquiry, clarify researcher's theoretical position.	Records all data accurately, use tapes and written records of interviews. Use NVivo software to facilitate theme development and coding, Discussion of findings with experts

Source: Adapted from Reige (2003)

3.5 Conducting the research

The study was conducted taking into consideration the procedures for undertaking case studies as recommended by several researchers: Yin, 2003; Perry, 1998; Hancock and Algozzine, 2006; and Creswell, 1998. The methods of data collection, now explained in detail, are those that are commonly used for this type of research.

3.5.1 Criteria for case selection

The population studied in this research project was franchised and independently owned coffee shops. These businesses were selected for several key reasons. Firstly coffee shops are substantial in number (over 13,000) within the small business sector in Australia (ABS, 2005). Moreover, with the growth of the coffee 'culture' (Huckstep, 2008) the number of these businesses continues to grow and hence, they are a significant contributor to the economy. Finally, coffee shops are found in many locations, therefore providing opportunities for the researcher to select potential candidates. Furthermore, as the study is to compare franchised with independently owned coffee shops, the sector to be investigated needs to have both of these business models represented. This is the case with many different businesses, but considering the above criteria and the fact that there are several franchised coffee shop systems from which to choose, including Gloria Jeans Coffee, The Coffee Club, Zaraffas, Muffin Break, Michele's Patisserie and Billy Blue, this sector is deemed appropriate. The number of independently owned coffee shops is also large thereby providing the researcher with a good opportunity to collect suitable data from a well suited sample.

The design of the study requires that the cases selected are to be *matched pairs*. That is, they are to be in the same geographic location which would attract a similar clientele, have similar rents, opening hours and environmental issues such as passing traffic. The aim of this matching is to try to limit the variables between the pairs so that the main *differentiating* factor is the business model. It was assumed that if other factors were minimised, the influence on work-life balance of a franchised or independently owned business would be more obvious and provide the researcher with the opportunity of being able to notice these similarities and differences more readily (Eisenhardt, 1989).

Based on the large number of possible candidates it is not critical to evaluate the potential cases prior to selection (Yin, 2003). Rather it is important to determine whether there would be a suitably matched pairs, and that both the franchised and independent candidate would agree to participate. If, for example, the franchise operator agreed and the case was conducted but there was not an independent owner for the same area, then the choice of the first case would be invalid.

The research has 20 cases comprising 10 matched pairs. The first two cases (one franchised and one independent business) were selected as the pilot study. These cases were chosen based on geographical convenience, access to the subjects and business type which was suited to the study (Yin, 2003).

The approach to the potential candidates was made in person for 18 of the cases, the other two were asked to participate by telephone. The researcher went to different sites to confirm the potential for candidates and then approached different coffee shops and asked to speak with the business owners. Once access had been achieved the project was outlined (an Information Sheet was provided see Appendix 3), the time requirement explained, and the business operators asked if they would participate. If they agreed an appointment was made for the questionnaires to be completed and the interviews to be conducted. Of the 20 cases only one was conducted at the time of the initial approach. The two approaches made by telephone were to candidates that had been referred to the researcher, so they had prior knowledge of the project and did not appear concerned that they had not been asked in person to participate.

All of the candidates explained that they would have a challenge with the time requirement but they were happy to be involved. This response was not unexpected by the researcher as it is known that small businesses are resource limited and the owners sometimes find participating in research an imposition (Carson et al., 2001; Hill and Wright, 2001). It was because of this knowledge that the researcher expected a large number of requests for participation to be refused, but that was not the case. Possibly the research was being conducted in an area the candidates found to be of personal interest, and they welcomed the opportunity to discuss their situation. One of the participants commented that he was grappling with the work-life balance issue and he found the request to be timely and opportunistic.

Of all of the candidates asked to participate, only two said they were not interested. One was a franchisee, and the other an independently owned coffee shop owner. A further two candidates cancelled the appointments. One telephoned the researcher to change the appointment several times but after the third time it was determined the case was not suitable as it was also difficult to find a case that represented the alternative business model. A second case was booked and when the researcher arrived, the subjects had been called interstate for a family emergency and hence this case was not included in the study. Both of the cancelled cases were independently owned businesses.

The cases included in the study were from 10 different locations in both urban and regional areas. The urban locations were randomly selected based on suitability, and the regional locations were included to the distribution of coffee shops in Australia.

The inclusion of businesses owned by men, women, husband and wife teams, parent and child teams, siblings and business partners was thought to provide a different perspective on the significance of work-life balance in the candidates' lives. The selection of the sample did deliver the variety desired.

Theory was used as a guide to determine when enough data had been collected. For this research project the requirement for matched pairs meant there would be an even number of cases and it was apparent through individual case analysis and comparative case analysis that 20 cases would provide sufficient data given that collection of data in small businesses is difficult (Perry, 1998; Carson, et al., 2001).

The inclusion of a pilot study was beneficial as it allowed the researcher to commence the case selection process prior to embarking on the full study (Alam, 2005). The pilot study will now be discussed.

3.5.2 Pilot study procedures

The pilot study allowed the researcher to run a pre-test prior to conducting the full study. Pilot studies do not have to be exactly the same as the main study as they are designed to inform the researcher whether the correct information is being sought (Perry, 1998). The intention in running this pilot was to be able to test the method for

case selection, approaching cases, and the data collection tools. It was an exploratory tool. Following the collection methods it provided the opportunity for individual case analysis and comparative case analysis to be conducted so that changes could be made where deemed necessary.

The first case used in the pilot study was selected for several reasons. The business was geographically convenient and the researcher had very good access to the interviewee (Yin, 2003) having had previous contact with her. The interviewee was also very interested to participate as she was interested in the area of research and also intrigued by the research process. The business was an independently owned coffee shop. The objective for the researcher in conducting the first case was to determine whether the candidate would readily understand the questionnaire. Although the *questionnaire* had been designed and reviewed by other researchers prior to its use (Alam, 2005) it was yet to be determined if its implementation would be successful. Its use in the first pilot was helpful in recognising that some questions were included as closed (yes/no), but they needed to be open questions that allowed the candidate to explain further. Other examples that required alteration were questions designed to elicit information from franchisees and independent owners, but were not clear and hence they were rewritten.

The following step of *conducting* the interview was also to enable testing the technique. The interview included using the interview protocol and confirming whether the questions were encouraging the candidate to answer with information that would provide the required information. Conducting the first pilot interview also allowed the researcher to practice the interview method. Furthermore it demonstrated the need to be seated in an area where the candidate would not be distracted by what was occurring in the shop, and could be heard by the interviewer.

Another outcome of conducting the first case in the pilot study was that it became apparent how important interviewer *observation* could be. As the interview was conducted, facial expressions and gestures were key to providing clues about how the candidate felt about issues (Gummesson, 2000). Audio tape recording the interview, allowed the researcher to focus on both verbal and non-verbal communication.

Refinements were made to the questionnaire and the interview protocol following the first case. The second case was a franchised coffee shop which made the pair for the pilot. The researcher was now more familiar with the research tools and had a better understanding of how to conduct the three methods of data collection. The issue of timing was clarified as this participant took longer to understand the questions in the interview as some of the concepts were unfamiliar and required more detailed explanation. However, this experience better equipped the researcher for these queries when the main study was being conducted.

The procedure for using the questionnaire will now be discussed.

3.5.3 Personally administered questionnaire procedures

The purpose of the questionnaire design was to collect initial information about the respondents. This information included- the business, and some of the factors that might impact on work-life balance challenges and an initial profile of each respondent. The tool was designed as a personally administered questionnaire so they were completed with the researcher present in all cases, except for one where the respondent asked if he could complete it prior to the interview. He cited two reasons for wanting to do it this way: firstly, it would provide him with some insight into what the study was about; and secondly, it meant the time he would have to take away from working in the business would be shorter.

One of the main objectives of using the questionnaire was to have one set of standard questions that all candidates answered (Yin, 2003). While this is not a requirement of case study research, however, for this project it was deemed useful to have some standardised questions for comparison purposes.

The questionnaire (Appendix 1) consisted of 22 questions. They were both closed (yes/no answer) and open questions, which require greater detail to answer. Rarely did the questions have to be explained. Only on some occasions was it necessary to request that the questions be completed in some greater detail. Some examples of questions such as “why did you decide to open your own business?” were answered very briefly in the questionnaire, however, once questioned by the researcher with more probing questions, the candidates were more forthcoming with information.

Some of the questions were designed to be similar to the interview questions. The purpose of this was to seek confirming data. There were some questions such as “do you enjoy running a coffee shop?” that were answered “yes” in the questionnaire, yet when questioned further in the interview, different responses were given. This was part of the triangulation of findings (Stake, 2000; Miles and Huberman, 1994).

The questionnaire was designed to take about 15 minutes to complete. During this time the researcher was able to prepare for the interview by establishing a rapport with the candidate. Having the standard set of questions seemed to relax the participants as they saw the tone of the research was not judgmental or inclined to pry into their personal choices, and therefore it tended to set the interaction up to be complicit.

Some of the data being sought from the questionnaire was quantitative in nature. There were questions such as “how long have you had the business?”, “How many hours outside the operation do you spend working in the business?” These questions were included to collect data that can be used to compare perceptions against reality. They were not included for the purpose of running a quantitative study within the qualitative stage. The data collected allowed the researcher to obtain a greater business profile of the owner for example, clarifying how they felt about how many hours they spent working.

Once the questionnaire was completed it was collected and the candidates did not refer to it again. The interview procedures will now be discussed.

3.5.4 Interview procedures

Case studies typically include interviews as a data collection tool and conduct of these is very important in determining the quality of the data (Cepeda and Martin, 2005). The interviews in this project were in-depth and semi-structured. An interview protocol (see Appendix 2) was used as a guide for all cases, allowing for the researcher to ask a question and the candidate to respond. These responses often led to further questions not included in the protocol but aided probing and confirming, thus generating more useful data. These were open ended interviews (Yin, 2003), were aimed at pursuing the research line of inquiry, while at the same time encouraging the candidate to discuss

matters that were relevant to the topic, and possibly some not considered by the researcher in designing the original protocol.

The main questions in an interview protocol need to be open ended to encourage the interviewee to speak freely about the topics under discussion (Hancock and Algozzine, 2006). It is also important that the questions relate to the research issues so that the information being collected will ultimately answer these issues. The interview protocol included twenty four open ended questions. Some of these questions repeated the questionnaire. However, in the spoken dialogue, they tended to be answered in far greater detail.

It was the responsibility of the interviewer to refocus the discussion if it was found to be deviating from the research question area. The questions did not only specifically ask about work-life balance, they also inquired about issues that could impact on it. Some examples of the questions asked in the interview are: “You have chosen to start your own business as a franchise/independently owned business. Can you explain why you made this choice?”, “How do you allocate your time between work and other ‘life’ activities?”, “What do you think is essential with regard to support when running your own business?” Other questions were more specific when discussing work-life balance such as, “In your opinion has your opportunity for work-life balance improved since owning a coffee shop?” or, “In your opinion what are the main restrictions you see relating to your work-life balance?” These sample questions demonstrate the research areas.

To help build rapport the first step in conducting the interview was to explain the process to the interviewee to ensure they understood what was required. It was important for all of these candidates to have an understanding of how long the process would take, so an approximate time was given. Their consent to participate in the study was requested prior to the questionnaire and included the consent to be interviewed. The first part of each interview explained the purpose of the study even though this had been discussed previously with the interviewee. Once the preparation had been completed, the interview commenced.

With the interviewees’ permission, the interviews were audio taped to ensure accuracy and later transcribed. There are arguments for and against taping (Hancock

and Algozzine, 2006; Yin, 2003). On the negative side it can be intimidating for the candidate to have a tape recorder playing while they are speaking and they may be less forthcoming with information. The time taken after the interview to transcribe the information can also be a deterrent to using this method of data collection. The benefits of taping the interview are in having an accurate and complete record of the interview. The interviewer is free to think about what is being said by the candidate and is able to consider the next questions that need to be asked. There is also the benefit of saving time as it is more time consuming to have somebody writing notes. Note taking is also less accurate, and may distract the interviewer's attention. In addition, the data analysis technique used in this research required the interviews to be transcribed.

All 20 participants consented to having the interviews recorded. The biggest challenge with the tape recording of the interviews was finding a location to conduct the interview not affected by background noise. This was a common problem because most respondents did not want to leave their businesses. Two of the 20 agreed to hold the interview away from their work site. This enhanced the quality of the recording and made transcription easier.

Some of the respondents were softly spoken which meant it was necessary to move the tape recorder closer to them; this could have been disconcerting, however, they understood the necessity. Another benefit of using the recorder was that on several occasions the interviewee had to leave the discussion and assist a staff member or serve a customer, so it was possible to pause the machine and play back what they had last said before recommencing.

Nearly all of the respondents stated, when they agreed to participate or when the researcher arrived to conduct the interview they were very short of time. Although initially this time limitation concerned the interviewer, it soon became apparent that this was more of an exit strategy than a reality. They were all busy but the interviews were rarely interrupted, and they were never cut short. The respondents relaxed noticeably as the interview progressed, and their exit strategy became less of an issue.

There were a few cases where the business was a partnership, and in two of those cases both parties participated in the interview. In all cases the interviewees expressed that they had been pleased to participate, and were keen to be informed of the results when they were analysed.

3.5.5 Conducting interviewer observations

Interviewer observations were conducted as a third source of data at the same time as the questionnaire and the interviews. There were some cases where the observation commenced prior to the first interaction at the appointed time, as the interviewer had to wait for the appointment. The purpose of the observation was to include the data that can be collected from non verbal communication, whilst the other case study data was being collected (Woodside and Wilson, 2003).

Conducting worthwhile observations requires skill and focus. The researcher needs to have an understanding of what they are looking for, and how the observations will contribute to answering the research issues, and the research question (Vidich and Lyman, 2000). The researcher has a background in Human Resources Management, holds a Masters of Education in Adult and Workplace Training, is a certified Emotional Intelligence coach and a trained nurse. Her work involves dealing with clients at senior management level in large organisations, and regularly relies on her skills of observation to determine meaning from interactions. Her education, prior experience and current work, make her capable of conducting these observations.

In this project the aim of the interviewer observations was to collect data that would enhance the verbal data. Observations were made about how the respondents engaged in the topics of discussion. It was important to see how they reacted when asked how they felt about the impact the business had had on their personal lives.

Observations included consideration of facial expressions. These facial expressions provided insight into whether there was consistency between what the respondents were expressing and what they looked like they were feeling. At times the interviewer was able to probe with further questions based on what she was seeing, rather than what was being heard.

Another required observation was the respondents' level of relaxation, or tension. Frequency of actions such as clasped hands, short answers and limited eye contact, indicate levels of tension. Whereas, adopting a more relaxed seating position and engaging in the discussion quite freely are more indicative of relaxation. Whether they were able to leave the business to their staff while they were involved elsewhere

indicated the level of trust they had of their employees. This was an issue that was raised during the interviews and questionnaires and was further reinforced through observations.

The observation data was not recorded during the appointment as it would have been distracting for both parties. It was essential for the interviewer to record that data soon enough to ensure an accurate recollection of events and impressions. This information was kept in a memo format and added to the other information.

The three data sources were collected over a three month period and were collated as they were collected. The described processes of data collection are consistent with conducting case studies in a qualitative methodology and the concepts are studied in the realist paradigm with an interpretivist view of interpreting the data as is outlined in figure 3.3.

Figure 3.3 Summary of proposed research methodology

Qualitative research	Realism Paradigm	Case study method	Interpretive analysis of data	Research project
<p>Researcher investigates topic that is multivariate is not quantifiable in nature and includes data for a variety of sources. Results of the research are expressed in words not numbers.</p>	<p>Topic is contemporary real world issue that is has both subjective and objective data. Acknowledges prior theory that directs the study to a degree.</p>	<p>Research project is designed to include a variety of data collection tools used in a number of cases with a view to collecting large amount of evidence. Triangulation of data possible due to the multiple data sources.</p>	<p>Data about real world contemporary issues are considered and interpreted to give meaning to the outcomes so researcher can provide answers to the stated research issues</p>	<p>Data collected by conducting interviews, questionnaires and observation. Twenty cases included in study, guidelines followed to ensure data collected is relevant to the research issues. Although most of the data is subjective, some is objective.</p>

Developed for this research based on Yin, 200; Carson et al., 2001; Hancock and Algozzine, 2006; Healey and Perry, 2000)

In order to make good sense of the information, it is of paramount importance to analyse it correctly. The process of data analysis will now be discussed.

3.6 Data analysis

After the collection of data the researcher needs to analyse it to provide meaningful information to answer the research question. At this stage the prior theory becomes significant (Perry, 1998). Extensive amounts of data can be collected during interviews and the researcher needs to have a plan for how to manage all the information. The collection of data is the beginning of achieving an understanding of the research issues.

It is not until the data is analysed and turned into meaningful information that the researcher can attempt to clarify the topics under investigation. Interpretation is the

way data is used to create meaning and understanding in qualitative research Gummesson (2005). Ultimately the outcome is the same as quantitative analysis; the data is collated, examined and compared. However, this use of semantics allows the researcher to have a better understanding of what is expected with respect to managing the analysis. The research issues are used as the basis for extracting relevant information. This is a challenge when the data collection tools generate significant amounts of data, some of which might not appear relevant at the time of collection.

Gummesson (2005) provides some very clear guidelines for ensuring good data analysis when working with qualitative data. Consideration of these guidelines assisted the researcher to conduct a thorough and valuable analysis. Some key strategies based on Gummesson's (2005) recommendations include:

- *Understanding.* This methodology is designed to direct understanding of a complex set of factors, and somehow generate an understanding of how these factors interrelate. It is not aimed at showing causality, as would be expected in quantitative research.
- *Simultaneous data generation and analysis.* The process of data collection is one that allows the researcher to reflect on the information during the collection phase. In the design of the case study protocol it is recommended that the researcher adjust questions and follow the lead of the candidate in the interview process. Once a case has been completed it is common for the researcher to examine and reflect on the data, prior to embarking on the next case study. The simultaneous collection and analysis of data facilitates the comparison of this data with theory, from previous and newly collected information. Comparison is beneficial in enhancing the interpretation of the findings.
- *Condensing the data.* Case studies generate a significant amount of information and this is one of the great benefits of this technique. The challenge for the researcher is to condense this rich resource into a manageable quantity that can be more easily analysed.
- *Transparency and recognising the human factor.* The researcher needs to take measures to explain the process they have used, and to demonstrate reliability and replicability in the way he/she has designed the research protocol. In this research method the experiences and interpretation of individuals will be a

factor. Transparency and the research design and methods such as triangulation are introduced to minimise the impact. However, it should be recognised that sometimes the interpretation will include some subjectivity.

- *Techniques and tools.* The techniques the researcher chooses for conducting the research must be consistent with the chosen paradigm and must also collect the required data as per the predetermined research issues. As there is a large quantity of data, software programs can be useful in storing and manipulating the data so that themes can be more readily identified, relationships can be analysed, and some analytical tasks can be performed. The use of this software can improve the overall quality of the interpretation of the information.
- *Data is not only the written word.* In this type of research there are other data sources that include written questionnaires and spoken interviews. It is often the non-verbal communication that can provide insights for the researcher and this data needs to be incorporated into the analysis.

The above strategies have been considered in the data analysis for this project. The review of the literature on this topic revealed that there was a multiplicity of factors that would need to be considered in this research. The fact the study would involve many individuals and their perspective on the topic, as well as the influence of outside factors, made it clear that this was not going to be a cause and effect topic. It is with this understanding that the analysis was anticipated to be complex and the outcomes varied.

The research design required that the interviews be audio recorded and transcribed before proceeding to the next interview. Recording data in a logical and manageable way from the early phases of the data collection is paramount (Miles and Huberman, 1994; Burns, 1994) as this form of research will produce large amounts of information. Emerging themes should be noted as well as the differences that are becoming apparent. This can be done through a process of coding the data (Miles and Huberman, 1994). The realism paradigm of research does not require every detail of the data to be included in the analysis (Sobh and Perry, 2006) so the development of themes is important to ensure the correct information is being sought. Prior theory guiding the research can help with the determination of themes (Carson et al., 2001). It is important to analyse the cases independently before any cross case analysis is done (Perry, 1998) as this allows the researcher to establish a clear picture of each case, as well as highlight any areas that might need further investigation or clarification. In this project each

interview was summarised and the themes put into a table so their frequency can be determined. The more frequently a theme occurs the more investigation it may require.

This process was designed to ensure the simultaneous collection and analysis of data. It allowed for the comparison of cases as they were being collected. Furthermore, it provided the researcher with the opportunity to see emerging themes which could be compared to the existing literature. This is one of the great benefits of conducting case studies, as the researcher is able to continually review the data and compare it to the research issues (Hancock and Algozzine, 2006; Carson et al., 2001; Sobh and Perry, 2006). Through this analysis the researcher was able to refine or expand the tools in areas that might require adjusting. At one stage it became apparent that some more information might be useful with respect to the candidates' satisfaction with different aspects of their lives, so additional questions were included. This occurred as a result of independent case analysis, followed by cross case analysis.

When cross case analysis the information from each interview question should be analysed independently. At this stage it is of the greatest importance that the researcher knows what they are looking for, and this must be established prior to the analysis (Yin, 2003). The importance of prior theory also becomes apparent at this phase (Perry et al, 1999). In this study the research issues were used as the key guiding factor in the analysis enabling the researcher to look for consistency or difference between subjects, as well as how the information reflects prior theory outlined in the literature review. It is possible that there will be converging or non-converging themes for one business model or the other. It is at this stage that the researcher can condense the data and classify the information into themes. Once this has been done it becomes easier to manage the volume of data. However, it needs to be understood that the data will not fit into formulas and neatly arranged patterns as would be expected with quantitative data, so the researcher needs to manage the information in ways best suited to qualitative research (Yin, 2003).

Qualitative research has been criticised based on the multivariate nature of the work, the design of the studies, analysis of the data, and the interpretation of the results (Cepeda and Martin, 2005). However, the use of careful research design, proper data collection tools, and good data analysis provide meaningful and insightful research outcomes. This study has included three data collection tools, triangulated (Reige, 2003)

by comparing the information from questionnaires, interviews and observations. This information has then been analysed with respect to existing theory to generate some outcomes.

Specific analysis of the qualitative data can be enhanced by the use of specialist software (Yin, 2003). NVivo is the software program used in the current research. The use of this tool has benefits to the researcher in the analysis phase (Cepeda and Martin, 2005). There are several functions that can be employed but the first stage of coding provides the opportunity to think about emerging themes.

Coding is the process during which all the data is entered into the program and the theme or node most suited to the text is selected. During this phase new themes may emerge that were not anticipated at the outset. It is also possible to create subsets in the nodes so that the information can be analysed in greater detail. Following the coding process it is possible to examine the data by looking for relationships. These are not cause and effect relationships, but associations. It is possible to determine how frequently an issue arises, and either considers the cases individually, or larger groups may present different patterns. The benefit of this software is it helps manage the volume of data and provides the opportunity to manipulate data in ways that would otherwise be very time consuming. There are limitations, but it is a very useful tool that improves the overall analysis of the data.

The wealth of data collected by this method of research includes subjective and objective information, and the collection methods used were questionnaire, interview and observation. It is essential to incorporate all forms of data in the analysis in order to build theory from the fieldwork (Cepeda and Martin, 2005). The challenge is using as much of the relevant data as is required to examine the predetermined research issues, and generate meaningful explanations, expressed in words, that will create a clear understanding of the research outcomes. A clear understanding of the research is most likely to occur when the researcher employs consistent techniques for both data collection and analysis. A table summarising the recommended data analysis and implementation for cases studied is as follows.

Figure 3.4 Data analysis and representation

Data analysis and representation	Case study	Research project
Data managing	Create and organise files for data	Files with all three data sources created for each of 14 cases
Reading, creating memos	Read through text, make margin notes, form initial codes	Read through questionnaires, interview transcripts, wrote observation memos, generated memos about each case with any specific data recorded, initial development of broad themes
Describing	Describe the case and its context	Individual case analysis conducted after each completed. Comparative analysis conducted as new cases collected
Classifying	Establish patterns of categories	Identified emerging themes created sub categories for more detailed analysis and classification
Interpreting	Use direct interpretation, develop naturalistic generalizations	Interpreting data in the light of emerging and converging themes, highlighted differences, considered patterns, reviewed data to as ongoing process throughout complete collection and analysis phase. Interpret-review-interpret
Representing, visualizing	Present narrative augmented by tables and figures	Data will be presented in narrative format and some of the data will be presented in tables.

Adapted from Creswell, 1998

The ethical considerations of conducting the research will now be discussed.

3.7 Ethics

Conducting ethical research is essential in any research arena and the University requires an ethical clearance for all research undertaken. The implementation of ethical standards is necessary to protect all participants in a research project.

This research project involved data collection from people through the completion of questionnaires, conducting of interviews and observations. When conducting research it is critical for the researcher to maintain the highest standards of ethics (Hancock and Algozzine, 2006). There must be no attempt to deceive the candidate during any stage of the process. It would be unethical to subject any of the candidates to the possibility of mental or physical harm, so the study was always conducted in a safe environment and candidates were not asked to undertake any risky behavior. They were free to withdraw consent or to refuse to answer any question, at all

times. There were no cases that chose to withdraw, nor were there any questions that the candidates declined to answer.

Maintaining anonymity for the participants is essential if that is required as part of the study (Creswell, 1998) and in this research it was a condition of participation. In order to ensure this, the cases have been coded so that individuals are not identified. They will be referred to only by their allocated code, and/or by their type of business format. Storing the data is also an important ethical consideration. It is necessary to store the original notes, questionnaires and interview tapes so that they cannot be accessed by individuals not involved in the study. In this project the data were stored by the researcher's supervisor at the university.

The Griffith University Human Research Ethics Committee (HREC) granted ethics approval and all guidelines for proper ethical conduct of research were followed. Follow up reports requested by the Ethic Committee have been provided and the final report submitted.

Copies of the information sheet and consent form that were given to all participants, are attached in Appendix 3 and 4. The information sheet provided the participants with information about the project and the researchers. The consent form ensured the participants understood their commitment, as well as providing consent to be involved. All consent forms have been submitted to the supervisor as per the required protocol. Ethical conduct is an essential element of a well thought out and designed project that seeks to answer some research issues (that have emerged from a review of the literature) about a contemporary real world issue of great interest to the researcher. The process used will be now summarised.

3.8 *Methodology summary*

The research project followed a qualitative research method in the realist paradigm using case studies as the most suitable method for conducting the research and case study evidence was collected through interview, questionnaire and interviewer observation. Twenty cases studies were conducted consisting of 10 matched pairs of franchised and independently owned business owners. Techniques for enhancing the

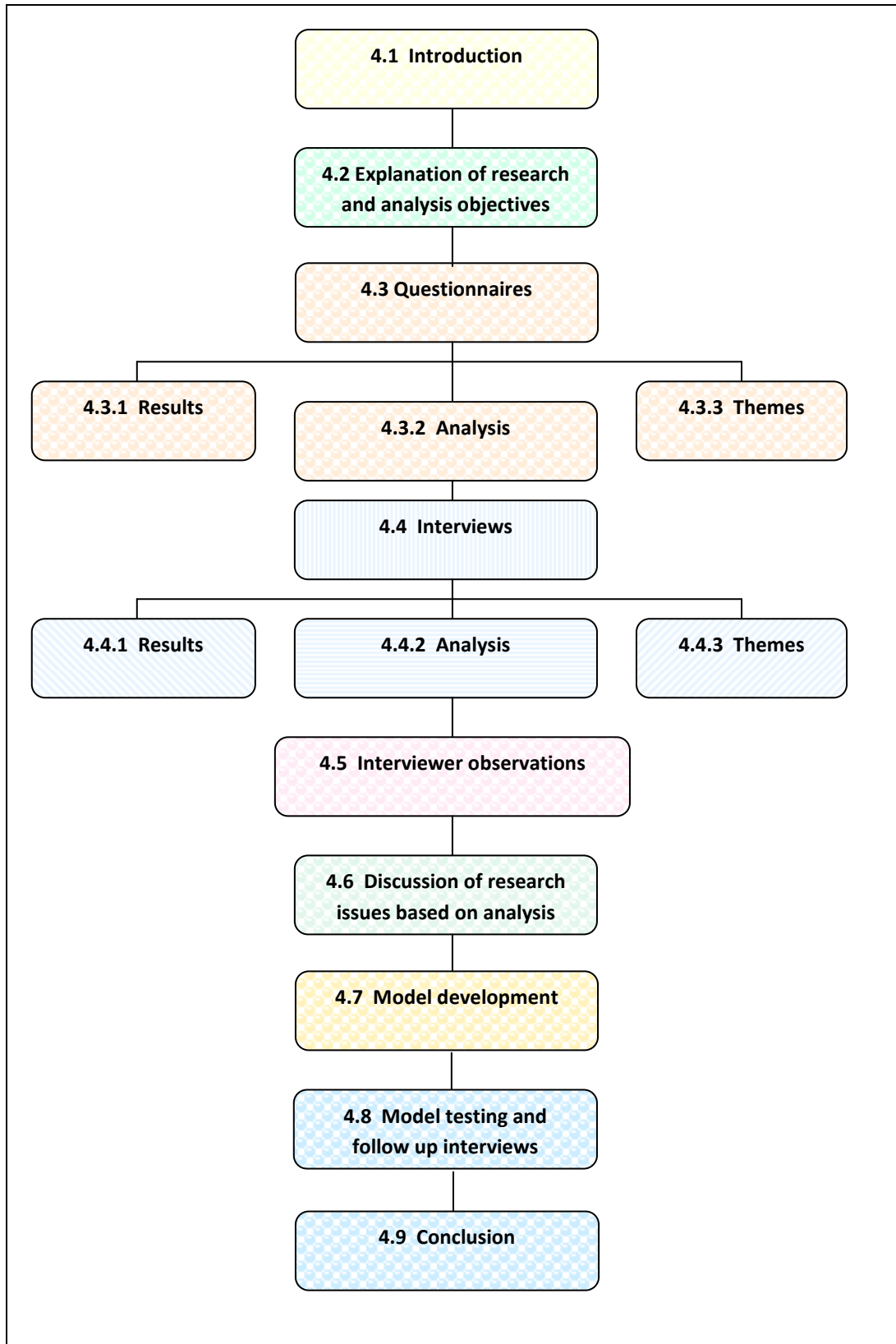
data collection have been discussed. The approach to data analysis has been set out demonstrating a methodological approach to examining and interpreting the information collected, to provide meaningful insights into the concepts of work-life balance in different small business models.

Chapter 4 Results and analysis

4.1 Introduction

This chapter includes a detailed presentation of results of the data collected from the three data sources for this research (questionnaires, interviews and interviewer observations). Initially an outline is presented that explains the objectives of the data collection and of the researcher in the analysis phase. The following sections include a comprehensive summary of findings from the data. Following each set of results the patterns of data that emerge are analysed and discussed. A discussion of the research issues identified in chapter 2 is presented in light of the analysis of the data. Finally, two models have been developed as an outcome of the research and these are introduced and their relevance to the research question is demonstrated. The chapter structure is illustrated in Figure 4.1.

Figure 4.1 Chapter Summary



Source: Developed for this research

4.2 Explanation of research and analysis objectives

This research project investigates how work-life balance differs for franchised and independent business owners. To answer this question several other factors need to be considered so that the researcher is able to draw conclusions about which the candidates might not be aware. The aim of collecting the data was to find evidence that explained whether small business owners were interested in pursuing a goal of positive work-life balance and what that actually meant to them. It was important to determine whether owning a small business provided the outcomes the candidates were hoping for in terms of control, independence and balance. The research also sought to determine whether the franchised or independent business model would provide a better opportunity for having work-life balance whilst running a small business. Investigating these issues ultimately leads to an understanding of the research question and will answer how work-life balance differs between a franchised and an independently owned business.

In this chapter the data patterns for the questionnaire, in-depth interviews and interviewer observations are analysed separately followed by an analysis of the research issues. All the cases were guaranteed anonymity so they will be identified simply as Ind1 to Ind10 and Fra1 to Fra10. Each case includes the three data sources and these have been coded and analysed using NVivo software program. NVivo is used for the analysis of qualitative data and the use of this software has facilitated the identification of several themes. Furthermore it has assisted with the identification of data patterns identified as nodes through the data coding process. The results and analysis of the questionnaire will now be presented.

4.3 Questionnaires

The questionnaires were completed by all 20 respondents. The data were loaded and coded in NVivo as free nodes creating a summary of responses for each question. Next the responses were summarised in an Excel spreadsheet to aid analysis. Four categories of answers were tabulated and analysed. Demographic data will be presented in this analysis as well as some preliminary information which sets the parameters for the

subsequent interview data. The information collected in the questionnaire is introductory in nature. It provides a background about the cases being studied and does not attempt to provide the depth of information sourced through the interview process. Hence, the summary provided in this section will give the reader a general overview of the cases including some demographics, their history in the business, how they staff the business and the way they perceive the business. The discussion of work-life balance is not included in this section. The reason work-life balance is not specifically introduced in the questionnaire is because the researcher's aim for this phase of data collection was to determine what factors might be influential when the issue of work-life balance was being discussed in interviews. The questionnaire was designed to highlight whether specific factors such as prior business ownership, family commitments, other commitments, staffing or other variables might be influential in the respondents' work-life balance without the researcher highlighting the potential connection. Hence the decision was made to not highlight the potential impact.

4.3.1 Results of questionnaires

The results of the questionnaires are set out in table 4.1 with the cases listed horizontally and the variables listed vertically. The cases are matched pairs, that is, for each location there is one independent candidate and one franchised, hence the 20 cases represent 10 pairs from 10 locations. The locations of these businesses are not disclosed as the candidates have been ensured their anonymity will be protected.

Table 4.1 displays a summary of ownership data results. The purpose of this set of questions was to determine the structure of the business, why the owner had decided to operate in an independent or franchised business and how long they had been operating. There is also data about the history of the business owner's work experience, and the reasons they chose to enter into small business, including specifically, why they chose a coffee shop. Staffing data collected in the questionnaires is also tabulated in Table 4.1 as is operational data for the businesses. Perception versus reality for business operations will also be considered.

The businesses have a variety of *ownership structures* ranging from sole ownership to family trusts. Of the nine sole owners seven are male and two are female

and they are divided between franchised and independent businesses. The two family trust structures are also divided with one being franchised and the other being an independent business. Other structures including husband and wife, brother and sister, family owned and partners were found in both business types. Ownership of the business ranged from six months to eight years with over half of the businesses being less than two years old. Nine cases had previously owned other businesses although only three had owned coffee shops and of those three, two had owned independent coffee shops and one, a franchise. Those who had previously owned independent businesses had continued with an independent business type and the owner of the franchised coffee shop had opened another franchised business.

The reasons for *choosing* the type of business model were varied for both independent and franchised owners. Some independent owners identified their previous work experience as a reason why they were able to use that business model.

Another reason they identified was that they felt it was a suitable location for the business they wanted to establish. The franchised business owners identified brand knowledge as a factor that influenced their choice. One candidate mentioned 'established systems' as being important. One respondent explained that his wife, who was not involved in the business, influenced his decision because she believed in the benefit of the successful model. For some respondents the choice was not about the business model, rather, they wanted to buy the established business and the decision was made based on previous performance of the business.

A range of reasons was identified by the individuals for opening these businesses which included lifestyle, financial and previous work experience. The desire to have flexibility or a change in lifestyle was raised in many of the cases. There also appeared to be a number of cases who identified the desire to own their own business without articulating why.

One of the frequently identified reasons for starting a coffee shop was previous work experience. This experience was either specifically in a coffee shop or it might have been in the broader area of hospitality. Another identified reason was the opportunity to make a good income. In particular, income was also cited as the reason for buying an established business. The purchaser had a good understanding of the current income

and of the potential income they hoped to attain, once they were able to put improvements in place.

The *decision* to buy an established business or to start a new one was divided between the franchised and independent businesses. Overall twelve bought established and eight started new businesses. The ratio of six established to four newly started businesses was the same for both franchised and independent business owners. The reasons for starting a new business were varied but included previous work experience, confidence in their ability and lower cost. The reasons for buying an established business included having established procedures, customer base, knowledge of income expectations and knowing the site worked. There was a range of previous work experience amongst the candidates including having worked for large corporations, in teaching, hospitality, having previous small business ownership and working for a franchisor. The various work backgrounds were represented over both the franchised and independently owned businesses.

Over half of the businesses had members of the *family* as employees including spouses and children. All of them required staff to be employed externally to the family. There was a variety of methods used to source these staff, including newspaper and internet recruitment sites such as *seek.com* and *careerone.com*. There were also several respondents who identified 'walk ins' or word of mouth as another way of sourcing staff. University students or children of local families seemed to be the labour source for some of these businesses. In-store signage was another identified method used for recruitment. All of these techniques were utilised by both the franchised and independent businesses.

The questions asked were aimed at obtaining an overview of the actual *hours* that the respondents were spending working on or in the business. Another objective was to establish whether they had other demands on their time in terms of family commitments or other personal interests. The *hours of operation* identified by all respondents varied significantly with some operating 363 days a year, some with extended hours and public holiday service, others being limited to a five or seven day week (without extended hours), although most were open for late night trade on Thursdays. There were eight businesses that did not have varying operational times of which five were independent and three were franchised businesses.

Additional to the opening hours there were hours required to work on the business *outside* of these times. This requirement varied from 3 owners who stated they did not do any work on the business outside the stated hours of operation, to several who engaged in up to 20 additional hours per week and one who required 25 hours. Two respondents' answers were undefined because when asked how many hours were required for working on the business outside the operational hours one simply said "too many" and the other said she was on call "24/7". One of these individuals already had a business that was opened from 7 am to 11 pm every day. On average the independent business owners said they had to spend fewer hours working on the business outside the stated operational hours and those working greater than 10 extra hours were both franchisees and independent business owners.

The *daily work activities* identified by all respondents were similar. They included functions such as customer service, preparing staff rosters, ordering supplies, dealing with accounting requirements, preparing food, coffee, managing the business, training and managing staff and all administration necessary for running the business. One of the commonly identified outside work activities was family demands. This included taking children to and from school, spending family time, sporting activities, cooking, cleaning and attending to the needs of a young family. Furthermore, some respondents mentioned attending to housework as a non-work activity. Not many of the respondents identified personal interests they pursued outside work except for five who mentioned sport and another who mentioned being a member of a motor bike club. These responses were classified as social as they included an element of personal endeavour as well as social activity. There were two respondents who clearly identified work activities as their outside work activity. One said that the extra demands were attending to bank and mail and the other to ensuring the staff was looked after.

When making the decision to enter into a small business the owners have preconceived *expectations* about how it will perform. The questionnaire asked whether they understood the demands of running the business before they started and more of the respondents answered affirmatively than those who felt they did not. Of the six who said they did not understand the demands, three were franchised business operators. One franchisee responded that the level of understanding was approximately half. Three independent business owners said they did not understand the demands. Those who

did not think they understood the demands highlighted issues about which they were unaware, such as the hours they would be required to work, the problems with staff, regional challenges and financial stress.

When asked if they thought managing the business became easier or harder over time most felt it was easier, although five respondents who felt it was more difficult were independent owners. However two independent owners said they knew what the expectations were because they had owned coffee shops before. Two felt managing the business was getting harder although one had owned the business for eight years. The one remaining respondent said it was harder due to the constant demands the business placed on him. Both franchised and independent owners agreed that managing the business became easier over time as systems were able to be put in place. Other reasons for it becoming easier included getting to know what the customers wanted and establishing routines. Overwhelmingly, the respondents indicated that they enjoyed running a coffee shop.

The section below provides an analysis of the summarised data which demonstrates the main themes that have emerged from the questionnaire.

Table 4.1 Summary of Questionnaires																				
Variable	Case																			
	Ind1	Fra1	Ind2	Fra2	Ind3	Fra3	Ind4	Fra4	Ind5	Fra5	Ind6	Fra6	Ind7	Fra7	Ind8	Fra8	Ind9	Fra9	Ind 10	Fra 10
Ownership																				
Sole Owner, male					✓			✓			✓	✓				✓	✓			✓
Sole Owner, female	✓		✓																	
Husband & Wife						✓							✓							
Family		✓		✓										✓						
Brother & Sister							✓		✓											
Partners										✓					✓			✓	✓	
Business type																				
Independent	✓		✓		✓		✓		✓		✓		✓		✓		✓		✓	✓
Franchised		✓		✓		✓		✓		✓		✓		✓		✓		✓		✓
Reason for business type																				
Experienced operator					✓		✓												✓	
Brand attractiveness														✓				✓		
Successful model						✓		✓												✓
Systems		✓																		
Location	✓		✓							✓		✓	✓							
Invest in coffee business				✓							✓				✓	✓	✓			
Lifestyle									✓											
Business Experience																				
First business venture	✓	✓			✓	✓		✓		✓	✓			✓	✓		✓	✓		
Subsequent business venture			✓	✓			✓		✓			✓	✓			✓			✓	✓
Ownership duration																				
Less than 1 year							✓			✓	✓									
1-3 years	✓	✓			✓			✓	✓			✓	✓			✓	✓	✓	✓	✓
4-5 years			✓	✓										✓						
Greater than 5 years						✓									✓					

Table 4.1 Summary of Questionnaires																				
Variable	Case																			
	Ind1	Fra1	Ind2	Fra2	Ind3	Fra3	Ind4	Fra4	Ind5	Fra5	Ind6	Fra6	Ind7	Fra7	Ind8	Fra8	Ind9	Fra9	Ind 10	Fra 10
Previous coffee shop ownership																				
Yes			✓									✓	✓							
No	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	✓	✓	✓
Reasons for business																				
Independence		✓	✓																	
Financial security										✓		✓				✓		✓		
Desire for own business	✓						✓		✓		✓									
Family history					✓			✓												
Lifestyle				✓									✓		✓		✓		✓	✓
Franchise opportunity						✓								✓						
Why coffee shop																				
Availability/opportunity											✓	✓	✓			✓		✓		
Work experience		✓	✓		✓	✓	✓			✓				✓						✓
Interest in F&B	✓								✓											
Enjoy coffee business				✓				✓							✓		✓		✓	
Commencement																				
Established		✓	✓	✓				✓	✓	✓	✓	✓			✓	✓	✓		✓	
New business	✓				✓	✓	✓						✓	✓				✓		✓
Why start or buy																				
Certainty			✓			✓					✓				✓	✓	✓		✓	
Established processes				✓					✓											
Opportunity		✓								✓			✓	✓						✓
Availability	✓							✓				✓								
Experience/ability					✓		✓											✓		
Previous work experience																				
Hospitality									✓	✓	✓			✓	✓				✓	✓

Table 4.1 Summary of Questionnaires																				
Variable	Case																			
	Ind1	Fra1	Ind2	Fra2	Ind3	Fra3	Ind4	Fra4	Ind5	Fra5	Ind6	Fra6	Ind7	Fra7	Ind8	Fra8	Ind9	Fra9	Ind 10	Fra 10
Coffee shop specifically			✓		✓							✓	✓				✓			
Family working in business																				
Yes	✓	✓	✓	✓	✓	✓	✓					✓		✓	✓	✓	✓		✓	
No								✓	✓	✓	✓		✓					✓		✓
Members																				
N/A								✓	✓	✓	✓		✓					✓		✓
Spouse	✓				✓	✓								✓			✓		✓	
Children																				
Both		✓	✓	✓								✓				✓				
Sibling							✓								✓					
External staff																				
No																				
Yes	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Source of staff																				
Internet	✓	✓																		
Walk ins/local area			✓		✓	✓	✓	✓						✓		✓			✓	✓
Multiple sources				✓						✓	✓	✓	✓		✓		✓	✓		
Newspaper									✓											
Business opening hours																				
Weekdays only									✓	✓										
Six days no Sunday no extended																			✓	
Seven days no extended hours											✓		✓			✓	✓	✓		
Seven days some extended days	✓		✓	✓	✓		✓	✓						✓	✓					✓

Table 4.1 Summary of Questionnaires																				
Variable	Case																			
	Ind1	Fra1	Ind2	Fra2	Ind3	Fra3	Ind4	Fra4	Ind5	Fra5	Ind6	Fra6	Ind7	Fra7	Ind8	Fra8	Ind9	Fra9	Ind 10	Fra 10
Seven extended days		✓				✓						✓								
Extra work hours per week																				
Nil	✓				✓														✓	
1 to 10			✓				✓	✓	✓	✓						✓	✓			
11 to 20		✓									✓	✓	✓		✓			✓		✓
21 to 30														✓						
Undefined				✓		✓														
Work activities																				
Food and beverage	✓		✓		✓		✓	✓		✓	✓		✓		✓	✓	✓	✓	✓	✓
Staffing		✓		✓		✓		✓	✓	✓				✓	✓	✓	✓			
Administration	✓	✓		✓		✓	✓		✓	✓	✓			✓	✓	✓	✓			
Customer care				✓	✓			✓		✓	✓				✓	✓		✓	✓	✓
Store management		✓				✓			✓			✓		✓	✓	✓	✓			✓
Non-work activities																				
Family/home duties			✓		✓	✓				✓			✓	✓	✓				✓	✓
Personal		✓													✓					
Social								✓	✓			✓					✓	✓		✓
Work				✓			✓									✓				
Nil	✓										✓									
Running business over time																				
Easier	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓			✓
Harder			✓										✓		✓			✓	✓	
Accurate preconceptions																				
Yes			✓		✓		✓		✓	✓	✓	✓	✓	✓		✓	✓	✓		✓
No	✓			✓		✓		✓							✓				✓	

Table 4.1 Summary of Questionnaires																				
Variable	Case																			
	Ind1	Fra1	Ind2	Fra2	Ind3	Fra3	Ind4	Fra4	Ind5	Fra5	Ind6	Fra6	Ind7	Fra7	Ind8	Fra8	Ind9	Fra9	Ind 10	Fra 10
Uncertain		✓																		
Unexpected factors																				
N/A			✓		✓		✓		✓	✓	✓	✓	✓			✓	✓	✓		✓
Time requirement	✓			✓																
Staff issues		✓						✓												
Finance						✓														
Local factors														✓	✓					
Business requirements																			✓	
Right decision																				
Yes	✓	✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
No																				
Yes with qualifier			✓	✓																

Source: Developed for this research.

4.3.2 Analysis of questionnaire

The data collected in the questionnaires and summarised in the previous section provides a brief overview of the history of the business owners and the reasons behind their decision to operate these businesses. It includes some information regarding demands from both their work and life situations. Some themes have emerged out of this data and will now be explored as they provide an introduction to the more in-depth and informative interview data.

4.3.2.1 Business ownership and business history

Analysis of two sections of the questionnaire about business ownership and business history reveal some common themes. The business models are evenly divided between franchised and independent with ten of each included in the study. There were eleven cases where this business was the owner's first venture and nine where it was a subsequent one. Of the eleven where this was a first venture five started new businesses and six bought established businesses. Of the nine respondents who had this as a subsequent business only three started new ventures, the remaining six bought established businesses. The establishment of a new business, (whether it was for the first time or subsequently), was divided between four independent owners and four franchisees. The established businesses were divided between six franchised and six independent owners.

The data revealed that there is a spread of the reasons for starting a business whether the candidates opted for a new or established business, be it a first or subsequent venture or whether the business model was franchised or independent. *Thus the choice seems to be a personal one based on available choice or past experience.*

Upon analysis of the reasons the respondents chose to start a business the most frequent response was there was an opportunity to enter into the business. The second most common response was that the location was available. The most common responses from those who chose to buy an established business were certainty, established processes and opportunity. The difference between these two groups appears to be that when the individual chose to start a business they were following an

opportunity; however, when buying an established business they sought more certainty in terms of financial history and established procedures. The benefit of having prior information about finances, trading history and procedures was seen in the context of mitigating risk. Establishing a business that has no history is inherently more risky as all the decisions are based on assumption rather than on historical data.

The above analysis highlights the fact that the candidates being studied are varied in terms of their reasons for starting a business and their choice of business model. The actual business type does not appear to have as significant an impact on the decision to start the business, as does the opportunity being present, or the business being available.

The next section considers the interrelationship between the operation of the businesses and the expectations of the owners.

4.3.2.2 Business operation and expectations of owners

Some questions were designed to examine the operations of the business including those about opening hours, daily work activities both during and outside operation hours and the non-work activities required. The participants were also questioned as to whether these requirements were as the business owners expected. Furthermore, there was an intention to uncover unexpected factors and to determine whether the respondents felt that the decision to run a coffee shop was satisfactory.

The candidates were asked about the number of hours they spent working on the business outside opening hours. The range was from nil to 25 hours with Fra2 explaining she was on call '24/7' and Fra3 unable to quantify the hours other than to say "too many".

The aim of this research is not to measure hours spent at work, rather to try to determine how an individual *feels* about the way they are able to allocate the time they have available to them. Fra3's response of "too many" suggests frustration at the hours spent working. His business opened from 7 am to 11 pm and then it required additional hours on paperwork. All candidates were asked whether they had an understanding of

what the demands of the business would be and thirteen agreed, six disagreed and one responded “50/50” which the researcher interpreted as being uncertain. When the responses were analysed with respect to the reasons cited as ‘unexpected’; two cases referred to the time required, two cited staff issues, two identified local issues, one respondent did not understand the requirements of running the business and one highlighted financial stress. Fra3 cited financial stress, not time pressure, even though he had extremely long opening hours and “too many’ hours outside the hours of operation spent on the business. However, Ind1 referred to the time spent on the business as the most unexpected challenge, yet she stated she spent no additional time outside the opening hours working on the business. Furthermore, she also said she had no non-work activities to attend to during the day.

Fra2 referred to her “non-work activities” as “work activities” such as looking after staff and ensuring they were happy, thus indicating that her main focus was attending to work related matters and possibly indicating an inability to distinguish the difference. In identifying local issues, Fra7 said he had not anticipated the problems with accessing supplies in a regional location. Respondent Ind8 explained that the policies of Centre Management at the shopping centre in which she was located significantly impacted on her business; a factor she had not anticipated. Staff issues were raised by two respondents as being an unexpected factor in running a business.

Fourteen of the cases had *family members* working in the business, including siblings, spouses and children. Both franchised and independent businesses used family members as staff. All of the respondents had to employ staff from outside the family and they used a variety of sources to find them.

When asked whether running the business was *harder* or easier over time 15 candidates nominated that it had become easier. The interesting observation is that these candidates had owned the businesses for between six months and six years. One would assume that owners who had been in the business for a longer time would have had the opportunity to face a variety of challenges and business cycles and would have the experience to ensure the business ran smoothly. Those with less than 12 months experience might not yet have faced some of the challenges that arise. However that does not discount their perception that it feels that it is becoming easier to run the business. Two of the respondents who said running the business was becoming harder

had owned their coffee shops for five and two years respectively, and both had owned coffee shops previously. Both Ind2 and Ind7 said they had a good understanding of what they were undertaking when they started the coffee shops. At the time of completing the questionnaire and interview Ind2 was trying to sell the business and Ind7 was planning to expand by opening another site. Respondent Ind8 had bought an established business and felt it was getting harder even after owning the business for eight years. This business was her first business and she said she had not had accurate perceptions before going into the business. Ind10 bought an established business and had previous business ownership experience, yet he also felt it was getting harder, identifying the unexpected factor as not understanding fully the requirements of the business. Fra9 was the only franchisee who thought it was getting harder to manage the business. He said he understood what was required so there were no unexpected factors, however he did explain that the constant need to be making all the decisions and being responsible for the business made it challenging.

Overall the work activities mentioned in all cases included an aspect of management - either administrative work or staff management and food and beverage related activities. This range of activities was mentioned by both franchised and independent business owners indicating that the business places the same demands on the owners, irrespective of the model.

Non-work activities identified by the respondents were categorised as family/home duties, social, personal and work. Respondents Ind1 and Ind6 stated they had no non-work activities in their day or week. Family or home duties was the most commonly cited non-work activity and this included time spent with children, housework and cooking. Social and personal activities included sport, and going out with friends. Fra2 and Fra3 categorised some work related activities as non-work, including banking, posting and staff management. Fra8 explained that he worked a second job during the time he was not working in the coffee shop.

The inclusion of the questions about non-work activities was to determine, prior to interviewing, if the candidates had a multiplicity of roles to fill. Based on these responses it appeared there were some, but not significant, additional requirements in their day. Fra6 explained that they had 'a traditional allocation of roles where he earned the income and his wife managed the family' thus minimising role conflict (Shelton,

2006). The final question asked the respondents if they enjoyed running a coffee shop and 18 of the cases indicated that they did.

4.3.3 Themes from questionnaire

The purpose of the questionnaire was to provide some background information about the businesses and the business owners under investigation. Questions were designed to explore specific factors as discussed above. Table 4.1 displays the business ownership data and it is apparent that individuals make choices of business structure and the type of business model based on a variety of reasons. More often the *choice* of a franchised business is based on brand attractiveness, or a successful model or system, as these are the reasons highlighted by six franchised business owners, but not mentioned at all by the independent owners. The independent owners more commonly highlighted location and prior experience as their reasons for starting that type of business model. Thus it appears there is a difference in this selection criterion, with both groups identifying different reasons for starting a business, although these reasons tend to focus on a form of independence. Attributes including being one's own boss, being independent, having financial security and lifestyle opportunities were all mentioned, indicating that respondents wish to take control of their own outcomes. Cases Fra3 and Fra7 cited the franchise opportunity as a reason for going into the business and Cases Ind3 and Fra4 cited family tradition as their reasons. *Thus the most common reason was associated with taking control in the owners' lives.*

The choice of a coffee shop appears to be more specifically related to the respondents' prior work experience or an interest in food and beverage (more specifically coffee) as 15 out of 20 cases gave these as reasons. *Hence, the emerging themes appear to be the desire to take back some control and to do this by embarking on a business in which the candidates had a prior knowledge of or an interest in the products and services provided.*

The inclusion of families in the running of these businesses is common to both business models as shown in Table 4.1. All these businesses need to employ staff from external sources and a multiplicity of sources including newspapers, walk ins and internet services are used to find these staff. *This finding demonstrates that, irrespective*

of the business model, the challenge of finding staff and using family members is not differentiated by business type.

Other information in Table 4.1 provides an overview of the requirements of running the business and the additional requirements placed on the individual based on the multiplicity of roles they fill. What becomes apparent is that individuals perceive their own circumstances very differently to how others might see them. For example, one person might have fewer opening hours, does not work outside the opening hours of the business and has no additional demands yet feels the factor with the greatest negative impact is the time required to run the business. On the other hand there is one individual who has extended working hours, and a family he wants to be involved with, yet time is not cited as the unexpected factor. *Thus another emerging theme is that the hours are not the problem, rather the issue centres on how an individual feels about how these hours that needs to be allocated within the context of business priorities.*

The data in Table 4.1 inquires about the expectations owners had prior to setting out on these ventures and what they are now realising. Most of the candidates believe the business gets easier to run over time but when that is compared to the length of ownership data it is interesting to see that those who have owned the business for less than 12 months think it is getting easier, yet several cases with more experience have found it harder. Four of the cases who found it harder were independent so perhaps there would be a difference if they belonged to a franchised system with built in support. The interesting finding from this set of questions is that most of the respondents felt they had an accurate preconceived idea of what they were entering into and they felt that the business was getting easier over time. *Thus another theme that emerges is that if there is adequate preparation and information and realistic expectations then running the business can be rewarding,* as all of the cases said they were happy with running a coffee shop even though two qualified their remarks.

The questionnaires were to provide introductory information for the interviews which explore the above themes in much greater depth. Furthermore the interviews also explore the concept of work-life balance in an explicit fashion. The following section provides a summary of the data collected in the interviews.

4.4 *In-depth interviews*

Twenty in-depth interviews were conducted subsequent to the questionnaires. These were unstructured in that there was an interview protocol (Appendix 2) which was used as a guide, but the interviewer followed any line of discussion that was revealing with respect to the topic under investigation. This technique encouraged greater depth of explanation from the interviewee. The interviewer was able to ask a question and frequently the respondent was able to talk for a few minutes about the topic under discussion. The aim of the interviewer was to have the interviewee 'tell his/her story' as this research project is aimed at determining how the interviewees perceive their own situations.

The questions included sought to determine how these business owners viewed their own situations with respect to the initial decision to enter into a small business, including whether certain factors such as the adoption of a franchised or independently owned business was influential in their perceived ability to derive work-life balance. Furthermore the discussions pursued a line of questioning to determine whether this was a matter that had even been a consideration prior to entering into business.

The resultant data provided the researcher with a rich source of information that is now summarised. This summary includes aspects of the business and how their affect the individual's work-life balance, personal aims and expectations, family and role conflict as well as the financial impacts of some of the choices made. Some of the results are tabulated but a more in-depth discussion follows in the analysis section (Perry, 1998; Yin, 2003) including quotations from the interviews to provide the reader with a clearer picture of the candidates' thoughts on these issues (Carson, et al., 2001). Furthermore, the emergent themes will be discussed including quotes.

4.4.1 *Results of interviews*

Table 4.2 summarises the responses made by the candidates when questioned about starting a business, including their reasons for doing so, their feelings at the outset, the most rewarding aspects, the biggest challenge they face in running this business, the reasons for choosing either a franchised or independent business model, whether they

felt the benefit of having a franchised brand justified the royalties, the kind of support the owners had in running their businesses, what sort of activities were required of them on a daily basis and what were their thoughts about work-life balance.

Although the *reasons for starting a business* were asked in the questionnaire the responses in the interview were given in much greater depth and several of the respondents provided more than one answer to this question. Mostly, the answers suggested the desire for more control over the respondents' lives. These responses included the specifically stated 'desire for greater control' or more general expressions of wanting control such as more flexibility, more control over decisions and/or more personal rewards. There were only two responses that could be considered negative reasons for making this decision and they were due to disenchantment with the respondents' previous employment. These responses did not appear to differ based on the type of business model owned. The interview did not include a question that differentiated the reasons for opening a business other than a coffee shop, as this had been canvassed in the questionnaire.

Many candidates stated that being in control in one form or another was the reason for *entering* into the business. Thus the researcher expected control to be the most common response to the question asking about the biggest reward from business ownership, however that was the case for only six respondents. The most frequent response was financial rewards, business growth and customer satisfaction. Loyalty from customers and staff was another response. Working with family was cited as a reward by some of the respondents but it was mentioned as one of the rewards rather than the biggest reward.

The biggest *challenge* of owning the business identified by 13 respondents was related to staff issues. The interviewees identified problems that included sourcing and retaining staff as well as reliability issues, including attendance and dealing with customers. Another challenge discussed with regard to employing staff was the cost. In the situation where an owner wanted to spend less time in the business they found it necessary to employ staff to replace them and this represented a tradeoff between time and income. The issue of generational impacts on the motivation to work and staff loyalty were also raised as a source of difficulty for the business owners. These challenges were raised by both independent and franchised business owners.

Less commonly identified challenges were issues with suppliers and managing the menu especially with a view to ensuring customer satisfaction. The concern with menu was raised by independent owners. Ind1, Ind3, Ind8 and Fra10 explained that the problem for them was the desire to keep the menu interesting and different for the customers as they felt that was what the customers wanted. Furthermore one of the benefits of having an independent business was they had the option to make decisions about the menu. Although this was not mentioned as the biggest challenge by other respondents, Fra5 and Ind6 cited it as an issue for their customers. Fra10 explained that even as a franchised business he was given freedom of choice about many of the food products he supplied and therefore the responsibility for menu was his. One franchisee (Fra9) identified feeling a lack of control as the biggest challenge he faced.

Table 4.2 SUMMARY OF INTERVIEW RESPONSES																				
COMMENTS	CASES																			
	Ind1	Fra1	Ind2	Fra2	Ind3	Fra3	Ind4	Fra4	Ind5	Fra5	Ind6	Fra6	Ind7	Fra7	Ind8	Fra8	Ind9	Fra9	Ind 10	Fra 10
Why start a small business																				
Desire to be own boss	✓		✓	✓					✓		✓		✓	✓	✓				✓	✓
Greater time flexibility		✓	✓													✓				✓
Greater control over own decisions	✓				✓						✓		✓			✓			✓	
Desire for the rewards, financial, personal					✓	✓			✓			✓	✓			✓	✓	✓	✓	
Prior experience				✓			✓			✓								✓	✓	
Family tradition								✓											✓	
Disenchanted with job	✓	✓																		
Feelings about the decision to start the business																				
Scared, anxious, nervous, challenged	✓	✓	✓			✓		✓	✓	✓		✓	✓							
Excited	✓			✓										✓	✓		✓	✓	✓	
Happy, content					✓		✓				✓									
Confident						✓										✓	✓		✓	✓
Biggest reward from owning the business																				
Being in control				✓			✓						✓	✓						
Results-financial, business growth, customer satisfaction		✓	✓		✓			✓	✓	✓		✓					✓	✓	✓	
Loyalty from customers and staff	✓					✓					✓				✓	✓				✓
Biggest challenge in owning the business																				
Staff issues		✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓				✓		✓	
Lack of control																		✓		
Suppliers														✓						
Menu and customer satisfaction	✓				✓										✓					✓
Shopping centre issues/customer numbers																✓				
Why choose franchised																				
Support		✓		✓						✓								✓		
Systems				✓						✓										

Table 4.2 SUMMARY OF INTERVIEW RESPONSES																				
COMMENTS	CASES																			
	Ind1	Fra1	Ind2	Fra2	Ind3	Fra3	Ind4	Fra4	Ind5	Fra5	Ind6	Fra6	Ind7	Fra7	Ind8	Fra8	Ind9	Fra9	Ind 10	Fra 10
Proven success				✓										✓				✓		
Security						✓		✓												✓
Wanted the business not the model												✓				✓				
Why choose independent																				
Freedom to choose menu and suppliers	✓		✓										✓		✓					
Did not want to pay costs of franchise					✓		✓				✓									
Desire to be different					✓								✓						✓	
Wanted the business not the model									✓						✓		✓			
Would either business model help improve work-life balance?																				
No difference as all the challenges would be the same for both types	✓						✓			✓				✓		✓	✓	✓		
Independent better as more freedom to choose		✓			✓						✓		✓		✓					✓
Independent as lower costs																				
Franchised better as more systems and support in place				✓				✓	✓			✓								
Franchise no better			✓																	
Only know one model so cannot compare						✓													✓	
Does the benefit of having a franchise justify the royalties																				
Yes		✓		✓		✓		✓				✓								
Yes but it is hard to say if my success is due to the brand name														✓		✓				
No			✓		✓		✓													✓
Undecided													✓		✓					
It depends on a variety of factors	✓								✓		✓						✓	✓	✓	
Over time the franchise is less beneficial										✓										
What are the available support networks?																				

Table 4.2 SUMMARY OF INTERVIEW RESPONSES																				
COMMENTS	CASES																			
	Ind1	Fra1	Ind2	Fra2	Ind3	Fra3	Ind4	Fra4	Ind5	Fra5	Ind6	Fra6	Ind7	Fra7	Ind8	Fra8	Ind9	Fra9	Ind10	Fra10
Rely on family				✓	✓					✓										
Rely on staff	✓						✓							✓			✓			✓
The franchisor is a source of support		✓						✓												
Rely on a combination of family, staff and or franchisor			✓			✓			✓			✓						✓	✓	
Do not have much support											✓		✓		✓					
Other franchisees in the system																✓				
How do you feel about the support available?																				
It is sufficient, family and/or staff are supportive	✓		✓		✓					✓		✓			✓		✓	✓	✓	
Not sure my staff are reliable						✓	✓		✓		✓									
Family help when necessary				✓																
The franchisor support is not in areas that the help is required		✓																		
The franchisor demands increase pressure on franchisees								✓												✓
The franchisor helps with managing the business				✓										✓		✓				
Do you think the support you have enhances or reduces your work-life balance?																				
To an extent but business ownership means the responsibility can't be left to anybody else	✓		✓			✓	✓		✓								✓		✓	
Owners create own situation so it is their responsibility					✓							✓		✓		✓		✓		
Sometimes the franchisor support requires extra work which reduces opportunity for		✓						✓												✓

Table 4.2 SUMMARY OF INTERVIEW RESPONSES																				
COMMENTS	CASES																			
	Ind1	Fra1	Ind2	Fra2	Ind3	Fra3	Ind4	Fra4	Ind5	Fra5	Ind6	Fra6	Ind7	Fra7	Ind8	Fra8	Ind9	Fra9	Ind 10	Fra 10
balance																				
Yes it enhances it				✓						✓					✓					
How do you allocate your time between work and 'life' activities																				
Work is the priority/ work dominates	✓					✓	✓	✓			✓				✓	✓		✓	✓	
The business choice was to accommodate 'life' activities					✓				✓	✓		✓	✓							
Desire to include other activities but work can take over		✓	✓	✓										✓			✓			✓
How do you feel about how you allocate your priorities?																				
Satisfied/ business ownership requires commitment				✓	✓		✓		✓			✓	✓		✓		✓			
Frustrated work dominates		✓				✓		✓		✓						✓		✓	✓	
Desire more time for other demands	✓		✓																	✓
Overwhelmed without respite														✓						
Hate it											✓									
Has your opportunity for work-life balance improved since owning a coffee shop?																				
No because of the problems with staff			✓								✓									
Probably not because the business occupies most of the time	✓	✓		✓			✓	✓							✓			✓	✓	
Yes because due to increased control over decision making					✓	✓			✓	✓		✓	✓	✓			✓			✓
No because of the low profit																✓				
How would you describe your work-life balance?																				
Some days very poor some days good			✓			✓						✓		✓	✓	✓			✓	✓
Meets expectations of business ownership		✓		✓													✓			

Table 4.2 SUMMARY OF INTERVIEW RESPONSES																				
COMMENTS	CASES																			
	Ind1	Fra1	Ind2	Fra2	Ind3	Fra3	Ind4	Fra4	Ind5	Fra5	Ind6	Fra6	Ind7	Fra7	Ind8	Fra8	Ind9	Fra9	Ind 10	Fra 10
Better with business ownership					✓				✓	✓			✓							
Worse due to time constraints	✓						✓	✓										✓		
Terrible causing burn out											✓									
What are the factors limiting your opportunity for work-life balance?																				
Cannot rely on my staff to run the business satisfactorily			✓				✓		✓	✓	✓									
Cannot let go of the responsibility for the business	✓	✓				✓						✓							✓	✓
The cost of employing more staff to replace owner is high								✓						✓	✓	✓		✓		
Responsibility is 24/7				✓																
Improved work-life balance					✓								✓				✓			

Source: Developed for this research.

The respondents were questioned regarding their choice of a business model. Support was cited as the most common reason for choosing a franchise model. Fra2, Fra5 and Fra9 cited more than one reason including not only support, but also systems and proven success. Another reason mentioned by franchisees was security. They felt that there was security in having the franchise system behind them.

The independent owners cited the freedom to choose menu and suppliers as well as not wanting to pay franchise fees with the same frequency. Several also stated that they desired to be different. This is somewhat consistent with the desire to have freedom to choose. Five candidates, Ind5, Ind8, Ind9, Fra6 and Fra8 stated they chose the business, not the model. When asked about the potential *impact* of either business model on the respondents' work-life balance the responses were varied. Six respondents thought that work-life balance would be better for independent business owners as they had freedom to choose within their model. This freedom focused mainly on the decision about opening hours. Two of the six respondents were franchisees and the other four were independent owners. Seven respondents Cases Ind1, Ind4, Ind9, Fra5, Fra7, Fra8 and Fra9 felt there would be no difference as the challenges would be the same irrespective of business model. Four franchisees felt the opportunity for work-life balance would be better with their business model due to the systems and support put in place by the franchise system. Two respondents said that they were unable to make an assessment as they only knew what it was like for their model. One respondent was independent and the other a franchisee. One other respondent said she did not think a franchised system would offer any advantages for work-life balance.

The issue of *royalties* was discussed in terms of whether the branding and franchise system was worth the cost of the royalties. The purchase cost of the franchise was not discussed as it was assumed all individuals establishing a coffee shop would incur establishment costs. Five of the franchisees said that the benefit of having a franchise justified the royalties. This was explained in terms of the branding, systems and support. Although the franchisees confirmed that royalties were justifiable some respondents were less convinced than others. Two franchisee respondents qualified their affirmation with a comment that they were not sure whether their success was due to the brand or their work. Another explained that the franchise was becoming less beneficial over time. As the franchisee became more capable franchisor support was not as necessary or forthcoming, hence the royalties were a cost that provided minimum benefit. One franchisee felt that the benefit of having a franchise depended on a variety of factors. The situation he found himself in was unusual because he felt he knew more about franchising than the franchisors due to his prior work

experience thus, he felt he provided more “human capital” (Stanworth et al., 2004 pg 543) than the franchisor. Furthermore his franchisors had changed during the time he had been a franchisee and the resulting confusion (from the franchisor) had led him to feel a bit perplexed as to the benefits of being part of the system. Hence his response reflects a lack of clarity on whether royalties are justifiable. One franchisee was responding that the royalties were not justifiable.

Half of the independent business owners indicated that the trade-off between the cost and benefit of royalties would be dependent upon on a variety of factors and therefore they were unable to make a definite judgment about the issue. Three respondents were definite and responded that the brand did not justify royalties, and two were undecided.

Support networks available to the business owners appeared to be a critical factor in providing them with the opportunity to have time away from the business. Support was discussed with the respondents in terms of who was available to relieve them of duties in either work or non-work activities. Most of the respondents only responded about the support they received for work.

The requirement to be in the business at all times could be completely overwhelming for those candidates who have opening hours from 7 am to 11 pm seven days a week, if they were never able to leave the site. As was revealed in the questionnaire, 17 out of the 20 cases being studied are seven day a week businesses so without some form of support these business owners would be working every day of the week. As the results reveal, some respondents feel they are not supported and feel they are required to work extremely long hours.

When asked what support networks are available to them, three of the respondents relied on family, five relied on staff and six relied on a combination of family and staff. Only two identified their franchisor as a source of support, and one identified other franchisees in the system as his main support. Three independent businesses said they did not have much support. Respondent Ind6 was a sole trader who expressed an inability to trust staff, and as his friends did not understand the hours he needed to commit to running the business he felt they had drifted away. His only support had been his wife but she had lost patience with the hours he had to put into the business and had left him. He felt isolated with respect to support. On the other hand Ind7 said he had “*always been self supporting*” so did not feel the need for external support, and because he and his wife were in the business together that they were able to manage alone. Respondent Ind8 was a single female who had had a daughter since starting the business. Her marriage had also broken up since

commencing the business although she said she was from a large family and they were active in her life. She did not however, cite them as support.

Subsequent questioning was aimed at determining how the respondents felt about the support they were receiving. Nine of the candidates felt the family or staff support they had was sufficient. There was also a sense of staff not really being very reliable and that impacted on how four respondents felt about their support networks. Three franchisees felt that the franchisor's support was helping manage their business whereas three franchisees felt that the support was not in the areas they required it or that the support actually placed additional demands on them.

The next line of questioning was aimed at determining whether the support was beneficial in improving the respondents' work-life balance. Two respondents (Ind6 and Ind7) who felt they did not have much support available were not included in this line of questioning as it was not relevant to their cases and they had stated how they felt about support in their prior answers.

The interviewees were asked whether they felt the support they had available enhanced or reduced their work-life balance. Commonly the response was that support enhanced the opportunity for work-life balance, however the overriding sense was that even with the support the owners felt it was their business and they could not really leave it to anybody else. The second most common response was that one creates his or her own situation so really it is up to the individual. Three of the franchisees felt that the franchisor's demands required extra work, thus reducing the opportunity for work-life balance. Three cases felt the support networks they relied on enhanced their work-life balance. One of these cases was Ind8 who had previously explained that she felt she had no support, yet after thinking about it she differentiated support at home from work, and decided she did have a support network for her family activities.

Each respondent was questioned about the different activities they had to undertake on a regular basis in order to achieve what was required of them, both from 'work' and 'life' perspectives. They were then asked how they allocated their time relative to these competing roles. Nine respondents said that work was their priority or that it dominated all other roles they had in life, six said that they tried to include other activities in their schedules however work could take over, and five said they had chosen the business so they could fit in 'life' activities. When questioned further about how they felt about the allocation of these priorities the most common response was that they were satisfied or resigned to it as since it was their business, they needed to make that

decision. This applied especially to the cases that had chosen the business to incorporate lifestyle. The second most common response was that the respondents felt frustrated that work takes over. The most negative response was from Ind6 who said he “*hated it*”.

Specific questions about how the respondents perceived their work-life balance and their situations, revealed a mixed set of responses. When asked directly if the opportunity for work-life balance had improved since owning a coffee shop the respondents were divided. Ten responded negatively, either because of problems with staff or because the business kept them busy most of the time. Of the remainder, nine felt their work-life balance had improved because they experienced greater control. One respondent drew a direct link between the low profitability of her business and her inability to attain work-life balance. These responses were similar for both franchised and independent business owners. Further questioning was aimed at determining how they would describe their work-life balance. The responses included “some days very poor and some days good” (Ind2, Fra3, Fra6, Fra7, Ind8, Fra8, Ind10, Fra10), “*meets expectation of business ownership*” (Fra1, Fra2, Ind9), “*better*” (Ind3, Ind5, Fra5, Ind7), “*worse*” (Ind1, Ind4, Fra4, Fra9) and “*terrible*” (Ind6). Only four respondents felt their work-life balance was better since having the business although three franchisees said it was what they expected when owning their own business.

Two dominant factors were identified as *limiting* the opportunity for work-life. One external factor was staff. This was either due to the fact that staff could not be relied upon to run the business if the owner was not there, or because the cost of employing staff had significant financial implications. The other factor was a personal issue whereby the owner felt they could not let go of the responsibility for the business. Even in circumstances where they said they trusted the staff they felt it was their business and they were clearly the person who was responsible for outcomes. This meant that even if they were not physically present at the workplace they were unable to relax. Only three respondents stated they had improved work-life balance and they did not cite limitations.

The interviews included many questions that have not been addressed in the summary, but the detailed content of the interviews is analysed in the next section. Direct quotations from the interviews are included providing greater depth and clarity to the analysis.

4.4.2 Analysis of interviews

The use of NVivo software enabled the researcher to code the interview transcripts, therefore facilitating the analysis of the large quantity of data collected. The following themes emerged and are discussed below: the reasons for a business, the business model, staff issues, financial considerations, support, work-life balance and satisfaction.

4.4.2.1 Reasons for a business

All cases were asked at the outset *why* they decided to enter into their own business. As shown in Table 4.2 the majority of respondents sought some form of control over their lives or business decisions. Greater flexibility, greater control of decision making and being ones' own boss were considered pull factors (Buttner and Moore, 1997), that is, they were drawn to the opportunity rather than forced to make the change. Fra1 expressed disillusionment at her former employment as a reason; hence she opted for business ownership. This would be considered a push factor (Lerner and Almor, 2002), that is, one that pushes the individual out of the current situation into another. Ind1 identified both push and pull factors, as she left a work situation that was not rewarding and decided to pursue an option that would provide her with control over her life.

The desire to have control of some form or another (such as being their own boss, greater flexibility, greater control over decision making, personal and/or financial rewards) was expressed by 17 of the respondents including both franchised and independent business owners. Ind2 clearly stated *"I went into my own business because I wanted to be my own boss and have more flexible hours because I had a young family so I thought this would be it. I could spend more time doing it the way I wanted to do it."* Fra7 also expressed similar sentiment. When asked why his own business his reply was *"To be my own boss and have a go I guess. Rather than read about it, have a go."* Fra10 who explained that his reason for entering into business was *"mostly just to be my own boss and take control of my life"* reinforced this thought.

Ind8 explained that she left the corporate sector to enter into her own business so she could reap the benefits of her own hard work. *"We were very passionate about our jobs and we said well we're going to do what we're doing now but we're going to do it for us!"* These quotes represented the thoughts of the majority, hence it can be concluded that the most common motivation for

starting a small business was to regain control either in terms of freedom of decision making or being one's own boss.

4.4.2.2 Business model

When respondents were questioned about why they chose their specific business model differences started to emerge. Eight independent owners remained consistent and identified freedom to choose their menus and suppliers, or the desire to be different as their main reasons. On the other hand the most common responses for the franchisees included the desire for operational systems, support and security. This difference highlights the fact that although the overarching desire might be to be in control of their business the independent business owners were more likely to be consistent in identifying goals associated with control when establishing their chosen business model. Ind3 explained why he felt having his business model would be more likely to provide him with greater control.

“OK if I was owning a franchise for example ..., probably I would have to open from 6 am until 10 pm whether I am busy or not. In my business here I open from 8 am to 5.30 pm and there you are. I've got my own right to shut the business whenever I want and I'm there for my kids at home”.

This sentiment was expressed by most independent operators. Ind5 explained *“I make most of my decisions and I don't rely on anybody to make decisions”*. Ind1 explained that *“We looked at the other model as well, the franchise. We like to have control of our own destiny. I think that's the main reason.....We steer the ship where we like to, total control”*. Further analysis however, reveals that independent owners were restricted in some of their decision making.

The option to vary their opening hours at will was considered one of the greatest benefits of being one's own boss. However, some identified that their decisions were dictated by other factors. Some who operated in shopping centres explained that they were obliged to comply with the contract they had with the centre management. Ind4 explained that *“we have to open certain times and certain dates because the shopping centre requires it. We have to do as it says”*. Concerns with the amount of influence a shopping centre management could have on business outcomes were expressed by a few of the business owners, both independent and franchised. Ind8 explained that the rent increases and the regular introduction of more competition were making it very difficult for her business, and when asked what was her greatest challenge for the business she replied. *“Paying the rent and dealing with people who don't understand hospitality. They might know how to run a*

centre but they don't know hospitality". As a consequence she had to work much harder to cover her expenses, requiring her to reduce costs in other areas such as wages. Fra8 expressed his concern that the centre had decided to undergo renovations and that that had had an impact on customer numbers. This was a factor completely outside his control yet it was impacting on his profitability, for which he had to compensate by working on the roster to avoid paying a staff member.

"We had target figures we thought were reasonable. We got close to them and then with interest rates going up its affected our profitability because the number of people we are getting through the door has dropped, as the people at the shopping centre has dropped".

Other restrictions imposed on these owners can occur due to customer preferences. Ind6 said he had tried to change his opening hours but due to pressure from his customers he was restricted in his decision making. *"I changed the opening hours which only lasted a couple of weeks as I would get people knocking on the door saying 'why aren't you open?' ... it didn't change".* Other pressure from customers were an issue for Ind1 as she managed her menu because *"making sure people come back for the food because if you don't keep on top of it people get bored and they go somewhere else"*. Ind8 expressed frustration at the lack of enthusiasm from customers for exciting and different food *"We've got a full kitchen at our disposal and we try to do fancy smancy meals. Our biggest seller is a mugachino and a ham, cheese and tomato toastie!"* She wanted to provide an interesting menu but was frustrated by the lack of uptake by customers.

Restrictions can also apply to an independent owners' decision making with respect to suppliers *"If you are an independently owned coffee shop you're buying somebody's coffee and then they'll hook you in as a franchise anyway"* (Fra7). Therefore, even though independent owners express a preference for control, many of the decisions involve outside factors, and these can and do influence them. Franchisees are in a different position as they cite the systems and predetermined decisions as the main reasons they choose that business model. Most of the franchisees recognised the value of the preliminary training provided by the franchisor although Fra8 expressed disappointment with the amount of training he was given, *"as new franchisees we saw them for the first 2 days we opened and we didn't see them again until July, 7 months later"*. Furthermore Fra9 said he found himself in the situation where, having come from a corporate franchise background, he was better informed about running a franchise than the franchisors. He intentionally purchased the franchise because he said the franchisors *"didn't have a clue"* which allowed him significant freedoms to make decisions within the system as the franchise agreement was *"full of holes"*.

Franchisees acknowledged the value of having manuals that addressed the many processes that were necessary for the successful running of the business. Furthermore, having the ability to call for advice when needed was another benefit of being in a franchise system. Fra10 identified the benefit the franchisor had provided in running his business,

“I’ve got no doubt they have improved my business like financial planning and following profit and loss a lot more closely than I would have once upon a time...I was making a profit but I had nothing in the bank and didn’t understand why. The franchisor helped me sort that out”.

Some found the system to be limiting in certain ways too, so that the systems they had sought as a source of certainty ultimately became limiting in their decision making. Fra1 who had stated initially *“we started our own business to be our own boss, have a flexible life”* responded to the question about why choose a franchise: *“franchises are good because you do have some support.....but they’re bad too because they start putting extra restrictions on you”*, indicating that she felt she was not necessarily free to be her own boss.

Other franchisees identified limitations imposed on their decision making such as the requirements to purchase from specific suppliers, hours of operation and attendance at meetings. Fra4 expressed a great deal of satisfaction with the franchised model as he said it provided him with all the systems and guidelines required to run a business. With this system he was able to follow family tradition and be in his own business and was pleased to have a franchise as he felt he was not ready to launch without assistance. Interestingly after a year and a half of operating, he now felt that sometimes the requirements of the franchisor were excessive, yet he was not in a position to deny their requests.

“I just think of this from a different perspective you know, from their point of view on doing things which for them is reasonable but from mine it is hard. They actually put me under more stress, under more pressure.”

Another more confident franchisee who had more experience did not feel as powerless in the relationship. Fra3 had been in business for 6 years and was comfortable telling the franchisor that he was going to make some personal choices such as not opening on certain days. *“Head office sends me a letter every year saying I must open on Boxing Day and I don’t do it”*. This indicates that he is now stepping outside the franchisor requirement as he continues to make this choice to suit himself.

The option to choose suppliers is limited for the franchisees. The agreements necessitate using specific suppliers however this seems to provide a level of comfort for some as expressed by Fra2 when discussing ordering supplies. *“I suppose I could maybe get it cheaper from other places but yeah it is very simple and straight forward”*. The benefit being articulated is that the negotiations are done and the processes are streamlined, ultimately representing a time saving for the franchisee. Not all of the franchisees were satisfied with having this restriction placed on them. Fra6, who had previously owned another franchise, said that as his confidence with business grew franchises could feel limiting

“there are a lot of limits placed on you with regard to what you can do, what you cannot do, what you can sell, what you cannot sell. So it can be very limiting. On the positive side they do a lot of the research and development for you.”

Another experience was not as positive as Fra10 explained that he felt he had paid a premium for using the franchisor as a supplier *“you don’t know about these things but the shop fitting, they charge you a huge amount for the fit out and I know now I have bought things for twice what I know I could get them for”*.

Being one’s own boss has advantages such as the right to choose opening hours, menu or suppliers. However, the owners might not have complete freedom as they are dictated to by a multiplicity of factors. For the franchisees, these requirements are explicit in their agreements and it appears the individuals who choose this business model do so because they want to be their own boss within the guidelines of a systematised, proven system. On the other hand those who choose to be independent seek to be their own boss and be in control within an environment that allows greater choice. For independent owners being different and having the freedom to choose are the main reasons they have chosen to embark on their business model. However customer expectations, shopping centre requirements and supplier agreements can place restrictions on some of these freedoms.

Thus it can be said there is an association between the business owners’ stated goal of business ownership and the specific business model they choose. The overall decision to start a business is driven by one motivation whereas the decision to choose a franchise or independent model appears to be driven by different sub-goals.

4.4.2.3 Staff issues

The impact of staff on the small business was seen as an issue of great significance. There were both positive and negative aspects associated with staff which created challenges in the operation of the business, as well as some rewards.

Thirteen out of the 20 cases said staffing was their biggest challenge in running the business. Another five identified staff as being challenging but not the biggest challenge. They identified several areas of concern with staff including sourcing, retaining, attitude and reliability. In each case the owner was working in the business in some capacity. Some worked purely in a management role as the business was large enough to support this. Fra6 deliberately bought an established business that was franchised and had very good brand recognition because he wanted the business, not the model. As he was experienced in running a coffee shop he wanted a business large enough to support him in a management role rather than him having to be on the roster. He explained at the time of interview that his biggest challenge in the business was finding enough staff. *“Staff is the most challenging because, number one, we just can’t find staff. We are constantly looking for staff”*. Similarly, Fra3 explained *“low unemployment is not good for hospitality”*. Ind5 expressed the same concern *“I think my biggest challenge is staff. Getting staff together and the right team to do the right job”*.

There was a sense that this was a problem faced by the hospitality industry because people were employed on a casual basis without much of a career path. Typically the employees were university students or young people who did not have much loyalty to the employer or the work. The level of commitment to the efficient running of the coffee shop was apparently not a consideration for these employees. The issue of sourcing staff was a challenge faced by both franchised and independent business.

The respondents raised the issue of generational impacts on work ethic and how that was impacting on the business and owners who would have to fill in for the employees who did not fulfill commitments. Respondent Ind6 stated

“I find the younger generation these days they don’t have the want or the will to work for pay. ... they feel it is their right to call in sick regularly and still be able to hold their job, ... you can’t just constantly dismiss staff and have a high turn around otherwise it impacts on

your customer base as well because they know there is something intrinsically wrong with the business if there is a high turn around with staff”.

This same issue of generational difference was raised by I2

“when I had my other business at XXX (location to be kept anonymous) I never hired young people. There were always women with children who wanted to work the school hours and they wanted the money but now over this side of town I can’t find those people”.

F2 expresses the same challenges *“If you didn’t have staff and you didn’t need staff it would be a perfect business”.* Fra3 also explained why he felt he faced similar challenges with staff. *“I think we live in a different era now compared to my parents ... Kids stay at home a lot longer as well so that affects me because they don’t necessarily need the money”.* Employing mature staff was a strategy used by Fra10 to try to increase reliability of staff:

“You can employ 15 and 16 year old kids and they’re dedicated for a while and then they find a social life and things change.....where adults are pretty well set, have a routine and don’t have as many outside influences”.

The generational impact was creating significant challenges. The feeling amongst most of the respondents was that the work ethic of the younger generations, especially Generation Y (Glass, 2007) was lacking. As employers they were faced with the challenge of having to rely on staff who did not feel obligated to work if there was the slightest reason not to.

The reliability of staff was another issue that significantly impacts on the owners having work-life balance. There were several examples where respondents explained that they felt unable to get away from the operation due to an inability to rely on their staff. It was not unusual for the business owner to be called upon to solve staffing shortage issues:

“At least five days out of seven you probably have someone call up sick....like I had been at work yesterday and somebody phoned up sick so I had to do a double shift because nobody else would come in. You just dread it because you think I’m already rostered on for all these shifts and you just don’t get enough time” (Fra1).

Another concern was that even if owners felt they were able to trust their staff they were still unable to abdicate responsibility for the business and felt the need to be available in order to deal with staff issues.

“Going on holiday, well it’s not that easy to go on holiday. You have got to make sure you have the right staff in place. And even when you do go away on holiday and you do have the right staff in place you are always thinking back ‘how are they going?’ and things like that” (Fra6).

This constant concern meant that even if the owner chose to take time away from the business they were not actually able to relax.

“There is a difference working for someone else than working for yourself. If I want to put my hand up and take a week off, even though everything is running here, it still falls back on me.....I am mindful too that they (staff) have commitments with uni and their lives so they can’t do it all the time” (Ind1).

IND10 explained that he had made the decision to close the business on Sunday which allowed him the opportunity to be free of concerns about the business that he is otherwise unable to ignore.

“I’ve got great staff but I still haven’t been able to take a step back and I really struggle with that....I love Sundays and I do not think about the business on Sundays because the door is closed and there’s nothing to worry about, no phone calls”.

Reliability of staff extended to how they performed their jobs. This challenge faced by the employers occurred as they felt the staff could not be trusted to provide the level of customer service they required of them if they were not supervised at all times. Fra5 discussed the difficulty of maintaining the level of service;

“I don’t necessarily think that I expect a lot but I know my standards are high and I want my staff to try to achieve that. .. I think everybody should try and work to the same standard.. I’ve had that problem for months at a time that I have had this business. Not with one particular person but several, so it’s having to replace them. ...There are a lot of jobs in hospitality and if they don’t like it then they can just go and someone will take them on”.

There were many examples of how this problem was impacting on the owners lives. It was clear that the unreliability of staff was a big challenge for owners and their ability to take real time away from the business or relax if they did take time away. This time away was not limited to holidays; it included just taking off days or shifts.

There were some positive comments about staff that indicated that when the owners were able to employ the correct people then the staff facilitated the owners' lifestyle choices. Ind7 identified retaining and replacing staff as a major challenge but was also quick to point out that:

"We rely on our staff and our staffing are very reliable and loyal. So, that gives us the opportunity to take a step back. We can pretty much make up our own hours, be here when we want to be here. Even though we are here quite a bit we've got the opportunity to walk out the door whenever we feel. We're confident that things are running smoothly on that particular day".

Other respondents identified they had trusted managers that they were able to leave to open, close or run the business at different times, allowing them some time off. *"I have one guy here that I can pretty much trust to run the show without me and he's got all the skills that I need, I don't need to be here while he's here. I'm pretty confident when I've got him rostered on that I can have a day off"* (Ind9).

As all of the cases had to employ staff, the issues raised are clearly of great significance in being able to achieve work-life balance. The generational impact appears to be significant as younger employees have a different attitude to employment, the buoyant economy with low unemployment means there are plenty of jobs available and the casual nature of the work tends to attract less dedicated staff. The lack of reliability also impacts as owners do not feel confident leaving staff to look after the business. These challenges were faced by a variety of the owners and the problems did not favour one or the other business model.

In brief it can be concluded that staff issues most often have a negative impact on small business owners' opportunity for work-life balance.

4.4.2.3 Financial considerations

Another consideration for the owners when taking time out of the business was that they needed to be replaced by staff and when they had been able to source the correct people to do this it represented a cost. For some that cost was worthwhile as it allowed them to have time to spend on other activities, whereas others felt it was too high a price to pay. The result was that some chose cost over benefit and others benefit over cost. Fra7 explained that the cost of replacing himself was very high: *"When there are two or three of them it takes one of me. I can work for 15 hours with no*

guidelines for award wages. I don't need a break or double time or anything like that." This quote also highlights the fact that employees do not have the same attitude to work as the owner does.

Ind6 explained that he had considered closing his business one day a week so he could have some more leisure time; however the implication was that he would lose customers who might never come back. Therefore, this decision could prove to be very expensive. Customer loyalty was identified by Ind10 as having a significant impact on his opportunity for work-life balance as the customers expect him to be there to serve them at all times. *"We have very good customers that come back every day. Unbelievable, they almost expect you to be here and they will come to the counter and expect you to know what they are eating and drinking"* He felt the pressure to be present in the business so he could ensure quality especially in light of increasing competition. *"People are very short in their loyalty. If they have one bad experience they've got more choice to go elsewhere"* (Ind10).

The financial impact of the cost of staff on work-life balance was also raised by Fra6. He commented that wages were his single biggest cost in running the business but the reason he chose that business was because it was large enough that he could afford not to work in the business, which he had to do in his previous coffee shop:

"The smaller the business the more difficult it is for you to actually take time off. The reason being is that if you get involved in small business the owner has to physically work in the business to try to cut down on labour costs".

Fra4, who had a relatively smaller business, reinforced this by saying *"I generally work four to five days a week here in the store. The only way I can bring down my costs is through the wages because all the other costs are fixed"*. Several respondents reflected this sentiment. Ind9 specified the need to do some renovations on the café which required him cutting costs on other areas:

"I usually have two days off a week but at the moment I'm taking one because I'm planning on doing some renovations around the place and putting a bit of money into the shop. I like coming to work every day in any case".

If owners want to reallocate priorities to include activities external to their work demands, then this incurs a cost either as staff to replace them, or the opportunity cost of lost business if they altered opening hours. In summary it is apparent that there is a cost benefit decision for the respondents when considering work-life balance choices.

4.4.2.4 Support networks

Support networks emerged as an important theme for the respondents. Seventeen out of 20 cases identified some form of support network such as family, staff, other franchisees or franchisor. Only three cases said they did not have much support. Most of the respondents considered support in terms of assisting with the business as opposed to looking at the external support networks they might have. Several respondents did identify however, that they had partners managing the family allowing the owner to focus on the business. These networks were seen as a backup which were useful at times when the owner might need assistance with the day-to-day running of the business. Reasons for this might be so they could help at home, or when the business was extremely busy and extra assistance was needed; for moral support at times when facing challenges, or having time for training in order to improve performance.

Four franchisees identified *support* as the main reason they chose to start a business using that model. Of those, only Fra1 actually identified the franchisor as the major source of support. Most of the respondents identified family, staff or a combination of both as their main support. This was interesting considering the number of reservations expressed about the reliability of staff. The ability to rely on staff as a support network was something for which the owners took responsibility. They explained that if they selected and trained the staff adequately then they would be able to rely on them. *“I’ve got amazingly talented people I can access. Be it by planning or be it by fortune, they’re there and I make sure I nurture them so I don’t lose them. They are valuable parts of my business”* (Fra9). As Fra2 pointed out *“we’ve got our managers and we’re really so into them to make sure they are right... what you sow you reap”*. Another way of improving the reliability of the staff was to employ some full-time staff. Four of the cases employed full-time managers which allowed the owners the option of coming to the business when they wished. Furthermore, they explained if there were good systems in place then they were more able to rely on the support of their staff.

Family was cited in three cases as the primary source of support. For two of those cases family members regularly worked in the business. Even though family members were not included as part of the roster, they were certainly available when needed. Fra5’s partner worked in the business as the chef, however the support she was most thankful for was his understanding of the stressful situations she faced at times. *“When we’ve had problems with staff, whatever, we can go home, we can talk about it”*. Fra6, who typically liked to rely on his staff, said he also relied very

much on his wife for moral support *“You have to make sure you have an understanding wife because having your own business you have to spend lots of time here and you come home and she’s the one who’s got to listen to your problems”*.

At times the support is physical where family or staff helps with the demands of work. Some 13 of the 20 respondents said there were times when they had relied on the assistance of family. Ind2 had had to share the time away on a family holiday with her husband so that when she went on the holiday he worked in the business and then she returned to work and he joined the family for the remainder of the break. This type of arrangement she found totally unsatisfactory but felt it was their best option. This clearly shows an association between support networks and work-life balance. If the support is coming from those with whom you want to share leisure time then there will be limited opportunity for leisure.

Although the franchisor was identified only once as the *main* source of support, the franchisee respondents identified support from a franchisor as an important factor in running a franchised business. At times respondents expressed great satisfaction with this support whereas other times it appeared to be a source of frustration. For instance, Fra2 was very satisfied with the support from the franchisor. She felt they were willing to provide whatever training and assistance was necessary, including answering queries on a range of issues. The support was so encompassing that even if she required time to go on holidays the franchisor would assist: *“because you have the option, if you want to go away, someone from head office will come and work for you...you pay a cost for them but they can do it”*. It was this kind of support that made her feel totally at ease with running the business. Fra7 also stated that he had a great deal of support from his franchisor. Both of these cases had the same franchisor.

Other franchisees identified *frustration* with the support they were receiving and they felt this impacted on their ability to have work-life balance. Fra4 felt he was being put under undue stress to attend franchisor meetings. Fra1 felt there was no support in the areas where she needed help such as in the administrative side of the business, and had spent many hours trying to learn that. *“We didn’t get enough support when we first got here, we didn’t see anyone for, like, two months”*. As a consequence she had found it necessary to employ a bookkeeper which was another cost to the business. Fra8 had a similar problem when he was left without any support for seven months following the initial two days of training and stated that the consequences of the lack of support had been financial.

“When we bought the business it didn’t exist and that’s where we made some of our mistakes because whilst you think you know everything these people are doing the business and they’re able to see the outcomes that are not right there before you. They should have been here far more!”

Fra5 felt that as she had become more capable the franchisor was providing less support and that she was paying royalties for minimal service. Fra10 was disappointed he had made the choice to become a franchisee as he felt there was little value for money and the support was very inconsistent and limiting. *“I find they hamstring me sometimes...Certainly you get consultants. I’ve had a few already....In 20 months I’ve had 7 of them”.*

Sometimes, even if there is support from the franchisor, the owner did not necessarily feel confident that they were not on their own: *“with being your own boss comes pressure if no one is there to do it then it is you every time. .. I am working for myself so I choose my hours but if they need me I’m the one that’s here because there is nobody else”* (Fra2).

Overall the respondents felt that it was important to have a form of support network in place to enable them to have some form of work-life balance. This support could be either external to the business, for example, child minding, or it could be support that was aimed at assisting them in the day-to-day of running the business.

4.4.2.5 Work-life balance and satisfaction

Many of the respondents were able to identify different roles they played in their life and for some it was clear how they managed to integrate multiple demands. For others there was a great deal of frustration because the business had prevented them from pursuing other interests.

There were 13 cases that had dependent children; the other seven either had no children or their children were mature and independent. Of the 13 with dependent children all expressed a desire to be able to allocate sufficient time to the parenting role. Respondent Ind3 accommodated that need by including the children in the workplace.

“although I do 70 to 80 hours a week here and we bring our kids over on the weekend they are here with us and we build the business together. But when they have to go to activities like tennis, piano or music they go from here. So it’s like a second home to us”.

Ind7 also managed to organise a balance between family and work to maintain a good level of satisfaction. Ind5 and Fra5 selected their businesses because they operated 5 days a week and had no late nights. They made this selection as family needs were the main priority. Ind5 had previously owned a seven day a week business and he wanted to be involved in family activities *“especially with my son who does a lot of sport and it’s up and down with him and I enjoy it too...I’ve learnt what I wanted to do was not seven days work and just work, work”*.

Fra7 used an alternative strategy where he has staff to manage the business and he goes home to help his wife with *“witching 24 hours”* with his young family. Fra3 also tried to organise some family time in his 18 hour days while stating that he had difficulty *“getting a balance between knowing when to work and when to spend time with the family”*. However he explained that he felt having a family compelled him to put some balance in his life, even though it caused additional pressure. Ind8 said she had had a daughter whilst running the business and this change had forced her to re-examine her priorities. *“I didn’t have a child when I first bought the café so no I didn’t have a struggle (with balance). It was 100% shop; had I not had her I wouldn’t have had any time off at all”*.

Interviewees who did not have the parent role, but were involved in a relationship, expressed some difficulty finding time to dedicate to their partners. Ind1 said she felt challenged when she was working and her partner was at home waiting for her on Saturday nights. Fra1 owners both said they were only really able to sustain the hours for a limited period as they were concerned about how much time they could spend with their partners. Fra2 felt her partner understood but she would not be able to maintain ‘24/7’ forever. Ind6 felt he had paid the biggest price of all. He had a role conflict between being a business owner and a husband and as he had chosen to his work role over his partner role he felt this had caused his marriage to fail.

“In all honesty I hate it. It ruined my marriage and there’s no time for anything else. I’m now at the stage of putting together information for brokers to list the business. It’s something I don’t want to do but I have to do in order to regain control of my life, to get back on track.”

Added to the problems with his marriage Ind6 also felt he was isolated from family and friends due to the time required by his business. Fra9 also attributed his marriage failure to the business although he did not say it was the sole cause. *“The business in one shape or form cost me my marriage as well... I don’t blame the business for that it doesn’t have everything to do with it but it certainly didn’t help”*. Ind8 had also had her marriage fail during her business ownership. Fra4, a young single male also expressed frustration at the fact that he was unable to have a social life as he

spent so much time working that he was tired and not inclined to want to go out. Ind2 said she felt “*frustrated*” with how she had to allocate priorities and that she too was selling her business so she could regain her life.

Hence, it can be concluded that the ability to balance roles is a personal one and that it is most likely based on how the individual is able to allocate priorities. Some of the respondents had managed to integrate their multiple roles and had made arrangements to satisfy their different needs. However, although a few of the business owners were frustrated by the domination of work over their other roles in life, some were resigned to it. As Ind1 said:

“Some people see their work life maybe that you start at 8 and you are entitled to a 10 minute break so at 10 o’clock you take the 10 minute break... I’ve never been, that’s not my work ethic.. so I work, I work”.

The above analysis reveals the central themes that emerged from the interview data. As discussed in the analysis these focus on the issues to do with the choice to run a business and the subsequent choice of business model. Further analysis considered the issues of staff, the financial implications of choices, the support networks available and the way individuals manage the multiplicity of roles they fill. Finally, the analysis examined how satisfied the respondents are with the balancing act. Specific themes have emerged from the analysis as discussed below.

4.4.3 Themes from interviews

Specific themes have emerged from the interviews that are key to the research project. Some of these themes relate to business ownership and others relate specifically to the work-life balance of small business owners.

It is apparent that individuals go into their own business for a variety of reasons but the most common theme is they are *seeking control*. This control is expressed in terms of being their own boss, having the freedom to make decisions or to be in control of their own rewards. This theme is consistent with both franchised and independent business models.

The decision to choose a specific *business model* is differentiated as franchised or independent. Franchisees express a desire for systems, support and proven business whereas

independent owners predominantly opt for the freedom to choose. Thus the choice of business model appears to reflect what the owners seek.

A multiplicity of factors emerged that appear to affect the owner's opportunity to obtain a work-life balance. Certain themes are consistent for both sets of business model owners. Staffing has a large impact on the running of all of these businesses. The shortage of available candidates is the primary issue and the owner's inability to rely on staff members is another factor, as the majority felt they were not able to leave their businesses.

The impact of generational differences on the *approach to work* was another strong theme to emerge. Employers felt they did not understand the motivations and actions of the young people they employed. They felt their lack of work ethic was detrimental to running their businesses. If the owner wished to be relieved from the responsibility of work, the only way they felt that was possible was to pay staff to achieve this. Hence, if the owner wanted to take time out there would be a cost in terms of the people they would roster on to replace them. The alternative was the cost of closing the business to have time off. The emergent theme was that there was a financial cost to 'life activities'. This was the same for both franchised and independent owners.

Support networks appear to be vital for the owners and the majority identified a source of support that was available for physical, emotional or administrative reasons. The positive side of support was seen as providing the owners with an opportunity to share the burden at different times. The negative aspect was the undue stress that some requirements of the support systems placed on individuals. This was an issue raised by some franchisees where the lack of support left some of them feeling isolated. The emergent theme is that *well directed* support impacted positively whereas over demanding or no support impacted negatively on the owners' work-life balance. The franchisees were more likely to be dissatisfied with their support.

The respondent's *perception* of work-life balance in relation to their different roles was linked to their feelings of satisfaction. The decision to integrate their roles was addressed by all respondents with some demonstrating a good ability, others making the decision not to try, and some who were totally disappointed with the intrusion of work into their life. The important thing to note at this juncture is that all of the aforementioned factors have a significant influence on work-life balance; however this theme considers only how they *feel* about role conflict as business owners.

The emergent theme was that it was a struggle to balance the competing roles, but those who clearly defined their priorities there was a sense of satisfaction. Conversely, frustration was greater for those who were not able to set expectations and realise them.

These themes were consistent with some of the issues identified from the questionnaire. Further data from interviewer observations will now be introduced.

4.5 Interviewer observations

Interviewer observations were conducted at the time of interview. These enriched the data collected as they tap into the extremely valuable non-verbal communication that occurs during an interview. Observation may be used during the interview process “to note body language and other gestural cues that lend meaning to the words of the person being interviewed” (Angrosino and Mays de Perez, 2000 pg. 673). The purpose of this data source was to determine reactions when certain questions were asked as sometimes the body language was very clear¹. All interviews were conducted face-to-face so this facilitated this observation. Most of the candidates were approached in person when they were asked to participate in the interview, so it was also possible to observe their reaction to the request. The following section discusses some of the perceptions of the interviewer.

Initially most of the candidates were happy to participate in the study and made appointments to meet at a mutually suitable time. Some responses were immediate such as Ind8’s comment; “*I’m in!*”, or Ind10 who said “*I am so happy to be part of this research, it (work-life balance) is the exact thing I am struggling with*”. Other responses were less predictable such as when Fra8 was approached and asked to participate and he stood silently looking at the researcher for over a minute. During this time the researcher determined that he was unlikely to agree to join

¹ The researcher is an experienced corporate coach in emotional intelligence and has experience observing and interpreting body language. She has worked in human resource management and sales, and has had significant experience in reading interactions with staff and clients. She has a MEd in Adult and Workplace training, and is experienced in observing and interpreting non-verbal communication. Her first qualification was in nursing where observation was required to be able to determine how a patient was progressing prior to them expressing themselves.

the study. He finally said he would like the interview to be conducted then. What had impacted on his decision making was the time he had available, as he worked a second job.

There were two occasions where the researcher arrived for the interview and the candidate was unable to proceed at that time. In both circumstances the participants demonstrated concern for inconveniencing the researcher through apologetic facial expressions and tone of voice. The response was unexpected from one of those candidates as he had responded to the initial request by saying *"if you can find an hour for me to do an interview I'll do it."* His response to having to cancel the appointment reflected his own attitude to having his time wasted. It took four attempts to actually conduct that interview and when the meeting finally took place the participant became so involved that the interview lasted for a very long time. He ended by thanking the interviewer for allowing him to crystallise some of his thoughts about the business.

The lack of time available was a common theme amongst all the candidates. They all agreed to be interviewed, yet several opened the interview with a comment about how busy they were. Some explained they may have to interrupt the interview if the business required it. Ind9 requested that I sat close to the counter so that he could face the counter to see when he was needed. As it transpired he is very 'passionate' about the coffee he serves and only allows one other member of staff to make it, and that person was not working at the time. Similarly Ind8 came out to the main area of the café, acknowledged the interviewer and explained she would be a few minutes as she was needed to clear tables. The interviewer came to the conclusion these were exit strategies by which the respondents indicated early in the process that they might need to leave, and providing them with an opportunity to limit the time involved.

Another observation was that all except for one interviewee chose to meet on site. Ind5 requested that the meeting be held off site and out of the hours of operation of the business. The interviewer expected this would be quite relaxed as the demands of the work would cause interruption, however this respondent also opened with *"I have limited time"*. Fra9 requested that the research be conducted on site but out of hours as he was not able to be out of the business for the necessary time during operating hours. Early in the appointment Fra9's mobile phone rang and he answered it explaining to the caller he would not be available for a couple of hours, indicating to the researcher that he had set aside time for the interview.

Some made it clear that their staff would be able to manage while they were being interviewed, however about half of these explained that they were on the roster if needed. Fra6 commenced the interview at a table in the shop, however as the interview continued he decided to move to an office he had on site. He explained that it was to minimise noise and avoid distractions. Making this move demonstrated to the interviewer that he had engaged in the process once he understood what was to be discussed. This stance was a shift from his original position of *“I am extremely time poor, how long will this take?”* to *“I think this will be more private and we won’t be interrupted”*. Ultimately only a few respondents actually left the interview to help in the shop so perhaps this was another exit strategy.

During the interviews it became apparent that the majority of candidates were a bit nervous and hesitant when the interview started as demonstrated by holding hands clasped, short answers and limited eye contact. However, as the discussion proceeded they all revealed relaxed behaviours such as increased eye contact, smiling, leaning forward toward the interviewer and speaking directly into the tape recorder. Subsequent to the change in levels of relaxation there was a free flow of information. Only Ind4 remained quite brief with her answers although English was her second language and this may have influenced her responses. Overall the interviewer felt that the candidates were unsure of the types of questions they might be asked but as their comfort level increased they seemed to forget they had prepared an escape strategy.

There appeared to be consistency between the body language of the candidates and the answers they were giving. Those who were explaining great satisfaction with their choices seemed to be smiling and their voices confident. Those who were somewhat more reserved appeared to be less ebullient. One candidate (Ind3) was very expressive and when he was discussing his business and his satisfaction with how he has been able to change his life, using flamboyant hand gestures and expressive facial expressions. For some of the participants their body language became quite clear when articulating some of their frustrations with the business and the systems they were involved in. Indicators of the increased tension and signs of frustration appeared such as hand holding, frowning and changes in their tone of voice.

A few participants were clearly enjoying what they were doing with the business. When questioned they were very expressive and engaged when discussing their situations. Cases Ind1, Fra2, Ind3, Fra3, Ind5, Fra5, Ind7, Ind8, Fra9, and Ind10 were very animated. Others were less demonstrative and indicated less enthusiasm such as Cases Ind2, Ind4 and Fra4. Cases Fra1, Fra7,

Fra8, Ind9 and Fra10 showed different feelings at different times depending what was being discussed. When Fra7 was explaining how he managed balancing work and family demands, he shook his head and looked stressed. He also had some inconsistent responses. He explained that having the business was “*exciting*” yet, when asked if these feelings had changed over time he replied “*No, I’ve just got to keep revisiting...revisiting why I came here in the first place. And if you stick to your goal you will be fine*”. These responses indicate that perhaps he was not feeling excited but more likely uncertain and trying to reassure himself that he had made the correct decision.

Fra1 (a mother and daughter, interviewed together) both demonstrated disappointment with the franchisor by shaking their heads. Although one did express concern, and looked rather anxious when discussing anonymity, both were quite animated when discussing working together. These participants tended to defer to each other and often looks passed between them when they were about to comment on the franchisor or staff. These looks suggested a shared understanding of the issues they faced.

Ind6 was clearly unhappy with the way his business was impacting on his life and showed signs of distress. When asked about how he allocated his time between work and life he actually covered his face, hung his head and was silent for a minute before he was able to answer. His expression was one of despair and he appeared on the verge of breaking down. He was quite measured in his responses and took time to consider his answers. He demonstrated a lack of enthusiasm in his responses yet still said he said he enjoyed running the business, otherwise he would not be there (although he was intending to sell). An observation about Ind6 was that after the interview had concluded and the tape had been turned off he continued the discussion for another 15 minutes talking about the challenges he faced and his feelings of disappointment and isolation. It was as though this had been the first opportunity for him to discuss his situation with someone who actually wanted to know how he was feeling about his choices.

Another of the participants (Fra9) explained that his marriage had broken up whilst owning the business but that he felt the business was not the sole cause although it had been a major contributor. He did not exhibit the same signs of distress as Ind6 and although expressing disappointment, he felt there were still some positive aspects to business ownership. There were some major differences between the two cases. Fra9 was in a partnership with his father and he enjoyed the support of his family and friends whereas Ind6 felt completely isolated from any

support. Fra9 was part of a franchise network whereas Ind6 was an independent operator. These differences might contribute to their different attitudes.

Many of the interviewees questioned the interviewer during the appointment times, either while they were completing the questionnaire or during the interview. These questions had two main themes: firstly, were they giving the correct answers and secondly were their answers consistent with other respondents. The questions about whether they were providing the correct answers indicated that the respondents had not been involved in many research projects. This is consistent with research that suggesting that it is difficult to engage small business owners in research due to resource constraints (Litz and Folker, 2002). The interviewer explained that the answers represented the interviewees personal situations therefore the answers that told their stories were the answers sought.

There were many questions from participants, both franchised and independent, about how other businesses faced challenges such as “do other business owners say that? Is it the same for other franchisees? Is it different for an independent business to a franchised business? Is everybody having the same problem?” These questions indicated to the researcher that the owners were seeking some reassurance that they were facing similar challenges to other owners. It led the researcher to believe that even if an owner was in a franchise system there might not have been much discussion amongst franchisees about their personal challenges. The independent owners had very little comparative knowledge about how other owners managed the challenges they faced. Some of the franchisees had some insight into what other franchisees in their own system were dealing with, yet the only issues they were aware of were business related. They were not informed about other franchisees’ lifestyles. The strong desire for reassurance that they were not unique in these matters indicated to the researcher that this was an area of concern for most of the participants.

One respondent was happy to be tape recorded and was quite forthcoming and open with his answers. He revealed some very personal information and when the tape recorder was turned off he continued to discuss issues for another 20 minutes. None of this data was recorded as it was not specifically related to the study but it indicated to the researcher the need for some business owners to have some support and to be able to discuss work-life issue.

The value of the data collected in these observations was as confirming evidence that the candidates were feeling what they were saying. This appeared to be true for all of the cases interviewed. Based on the above summary and analysis of all three data sources it is now possible to address the research issues outlined in Chapter 2. The following section will discuss the four specific issues.

4.6 Discussion of research issues

The review of the literature in Chapter 2 of this thesis highlighted four main research issues based on current research. The research conducted for this project has revealed some interesting results that will now be applied to these issues.

Research Issue 1a: To what extent do individuals determine their work-life balance?

b: To what extent is work-life balance of concern to them?

The perception of work-life balance is very much based on an individual's feelings about how they manage the many demands they face. It became apparent that many of the candidates in this study had not actually made work-life balance a priority when establishing their businesses. Only six of the 20 candidates expressed that lifestyle was an important deciding factor in the establishment of their specific business. These six all had family and five clearly stated that they were in the business to allow them to be with their family when they wanted to be. This indicates that this small group had established priorities and that they had sought out the best options to meet these priorities.

Many of the other candidates were not able to clearly articulate where they thought they were out of balance, although they expressed concern at their lack of time for other activities. Terms such as *'time poor', 'burdened' and 'frustrated'* were used when they described how they felt about the way in which they had to allocate priorities. This clearly suggested they were discontented by their situations, indicating that work-life balance was a concern to them. However, it was also apparent that the majority of cases had not considered that this frustration stemmed from the supposed lack of opportunity they had to allocate time to other pursuits. Fra7 demonstrated this lack of clarity when discussing his business stating: *"Getting up to go to work because you want to. Knowing there's a light at the end of the tunnel, knowing you're in control of your own destiny.....I kid*

you not, it has been three years of hell". This inconsistency indicates some confusion about how individual situations were perceived.

For some of the candidates there was the realisation that they had not considered their work-life balance until they participated in this research, some stating that they had not considered work and its integration into their life prior to the interviews. Rather they were so busy with the daily requirements of running a business that they were unable to sit back and analyse where their greatest source of frustration lay. They were able to identify staff as a challenge but as to how that was impacting was not as clear to them. They tended not to look beyond the causative factors when trying to resolve problems. Hence they cite staff as being a major issue but the real problem creating the frustration is that they are unable to be released from the demands of day-to-day tasks due to the challenges that staffing issues create.

In summary, it would be reasonable to assume that many of the small business owners felt frustration with the demands of work and the challenges with which they were presented. However, they did not always recognise this as a work-life balance issue. Therefore it is highly likely that work-life balance *is* a concern for them although they saw it more in terms of excessive work demands rather than the forgone opportunities for other activities they would prefer to incorporate into their lives.

How individuals determine their work-life balance is more complex. It appears to be related to the individual's priorities. Irrespective of what is most important to them, (whether it is work, family or community) the perceived lack of balance is felt when individuals feel they have *lost control* of setting these priorities. Interestingly those various factors identified by the owners as limiting their opportunity for work-life balance, were also the factors that minimised their discretion when making choices, particularly in allocating their time. This suggests they need to feel 'in-control'. Another issue when determining work-life balance is that it requires thinking about the multiplicity of roles that one fills, and how to allocate preference to those roles. Acknowledging that there are tradeoffs is also difficult for some, who find it easier not to think about it at all. The manner by which these individuals determine their work-life balance is the same as for all individuals, requiring an understanding of what they want to achieve, how these objectives take priority, and then allocating energy into those priorities. They need to feel they are in control of their own lives in whichever role they play.

Research Issue 2: How does starting a small business provide an opportunity for individuals to improve their work-life balance?

According to the literature, organisations introduce a variety of initiatives to enhance their employees' work-life balance which include flexible work practices (Blyton, 1991) as in the place and time of work, job sharing policies, special leave provisions (Lewis, 2001) and the introduction of technology that facilitates the work (Towers et al., 2006). The purpose of these policies is to ensure the employees have the opportunity to allocate time to the different roles they play in life. Many policies such as flexitime and special leave provisions (Maxwell, et al., 2007) are aimed at parents and assist with the demands of managing the needs of children. Other policies include aspects of technology that improve access to communication such as laptop computers and mobile phones enabling people to conduct some of their work without having to go to their workplace. Rather the workplace is wherever they want it to be.

If these are typical of the types of initiatives that improve work-life balance then it is clear that starting a small business *will not* lead to an improved work-life balance because the main beneficiaries of these policies are employees, not the business owners. Most of these policies also represent a cost to the business, and the owner is then faced with a cost versus benefit decision as demonstrated in the research. When the owners are not working in the business, they have to pay somebody else to fill their role and if these policies are made available to employees, the costs involved represent significant financial decisions.

It is also difficult for owners to let go of the responsibility for running the business so that they can focus on other roles. Even though owners may make provision to leave the business to be run by employees, they tended to acknowledge that they were solely responsible for its performance. Therefore, unlike an employee, being physically removed from the place of business does not relieve them of worry, and at times it is probably preferable to remain at work. The presence of reliable support networks can facilitate the owners' opportunities to incorporate a variety of activities into their schedules. These networks can be vital in establishing some work-life balance as they provide a resource that assists in either work or other role requirements, such as store management or child-minding.

The issue of using technology to allow work to be conducted where and when it suits the individual is not an option for these business owners. Although there are certain administrative duties that can be conducted remotely, the bulk of the work must be conducted at the coffee shop

where the customers are, and when the customers want the service. As was pointed out in the research, it is of the greatest importance to deliver what the customer demands, or else there is no business. The use work-extending technology (Towers et al., 2006) for these owners may make their work-life balance worse, as they have to spend the opening hours at the shop and then continue to work at home on the accounts, rosters, ordering and all other administrative tasks.

Potentially the owners can improve their work-life balance if they structure their business to do so. Some of the cases explained that when they selected a business, lifestyle was a central factor in their decision to buy that business. If they have a clear picture of what they believe they need to achieve a balance, then it is more likely they will achieve it. The critical factor in achieving work-life balance is having an understanding of an individual's conception of balance. It also needs to be understood that this concept will not necessarily be static, and changing circumstances will require a re-evaluation of priorities.

It is also important to recognise that individuals view their role priority differently. Some people love to spend hours at work and they derive huge satisfaction from doing so. This was demonstrated by Ind3 who said he loved it even though he spent 70 to 80 hours a week working. He made it suit his lifestyle. Fra2 also expressed genuine enjoyment from what she was doing and she was on call '24/7'. Ind9 said he was '*passionate about coffee*' (and his business), so would put in the hours needed. There were others who, although working fewer hours, were not enjoying it and were now trying to sell their business. These attitudes indicate that the balance is not about the hours, but how the individual feels about their choice of priorities. This is a key factor in whether they think they have work-life balance.

Thus, it can be concluded that it is very difficult for coffee shop owners to achieve work-life balance in the same way as employees who have access to multiple policies. Owners have the ultimate responsibility for the running of the business as well as the financial constraints inherent to the operation of the business. On the other hand if work-life balance is about how one perceives their own ability to allocate their priorities, and if they feel they have the freedom to make those choices, then it is possible for them to work towards it.

Research Issue 3: To what extent does business ownership provide individuals with greater control over their lives?

Business ownership allows individuals greater control over certain aspects of their lives in many ways. There is no doubt from the research that the ultimate responsibility for a business resides in the owner. This includes those decisions made at the earliest stages, from the business structure to the ongoing decisions of staffing, stocking, customer service and administration. The variety of choices the owner has will be influenced by the choice of business model. If it is a franchised system then some of the choices will be prearranged. However, this would be disclosed to them prior to their making the decision to buy. Similarly, the independent business owner will have some decisions predetermined based on the business arrangements into which they enter. There are multiple decisions made throughout the life of the business over which the owner will have complete discretion, and for which he/she will have the responsibility for the consequences of both the good and bad decisions.

According to the majority of participants in this study, the financial rewards for taking on this responsibility were positive. Most of the participants felt they had improved their financial position by being business owners and because of this financial success, there were now opportunities to make choices in their businesses, such as to employ managers or perhaps to open additional businesses. Therefore, it can be demonstrated that ownership of a small business provided most individuals with greater control over the work aspect of their lives. However, this research is investigating more than just the work and is in fact looking at each person's whole life and considers to what extent business ownership provides greater control over their lives.

Analysis of the data reveals that many of the respondents felt somewhat overwhelmed coping with a multiplicity of roles. Some indicated they had lost control and the only way to regain it was to sell the business. Ind6 indicated he felt he was unable to continue, and although he was running a financially successful business he felt it had *"ruined"* his life. Case Ind2 had also made a decision to sell the business as she could not cope with the lack of control over personal decisions to spend time with her family. Ind1 also had decided to sell the business as she said she had never anticipated the demands the coffee shop would place on her, and she felt guilty that her husband would be at home waiting for her. Fra3 said that if his children did not ask him to come home he would probably find himself working 18 hour days. Fra2 said she was not able to start a family whilst doing this, as it would not be possible. Fra9 believed the business had contributed to the breakup of his marriage and Ind8 explained that her marriage had also broken up during the time she had had

the business. Ind10, Fra10 expressed that they still felt they were struggling with work-life balance whilst owning their businesses, but that their work-life balance had improved compared to their previous roles.

On the other hand, Ind3 had found the perfect balance and was managing to incorporate all his roles, including business owner, family person, community person and friend. This was also the case for Cases Ind5, Ind7 and Fra5. Respondent Ind9 also expressed satisfaction with his work-life balance because he was living his passion; the only other thing he wanted to do was play cricket in summer, and the business allowed that degree of flexibility. Interestingly, four out of the five people who felt they were in control were independent owners.

It is clear from the results that business ownership gives individuals control over the business aspect of their lives. However, there is evidence to suggest that this is not always the case with the other roles they fill, and that at times they can feel so out of control that the only way to regain the control is to divest themselves of the business.

Research Issue 4: To what extent does the business model (franchised vs independent) affect work-life balance?

It is apparent from the research and the subsequent analysis of the data is that the situations described by the respondents are very similar. They face similar challenges and achieve like rewards from running the business. The issue of work-life balance as discussed above is challenging for all small business owners, especially in the hospitality industry where it is necessary for the work to be conducted at a specific site at certain times. This structure eliminates the possibility of 'work from home' options for the hospitality part of the business. In fact, when they are able to work from home it actually extends the already long hours they are dedicating to their business. Support was the main differentiating factor between the franchised and independent business owners with respect to work-life balance. The independent owners were only able to rely on family and staff whereas the franchisees had the additional benefit of the franchisor, however as the analysis has shown, support from franchisors was not well utilised.

The choice of a franchised business model provides benefits and drawbacks for work-life balance. The provision of support was beneficial for the *franchise owners* as it assisted them to learn the business quickly, and the manuals provided guidance for most queries. Most of the respondents felt that the support was advantageous at one time. One franchise system was identified that would

even provide temporary management to allow the owners to go on holiday. This kind of assistance would certainly make the owner feel they had the opportunity to 'take a break' if necessary.

The drawbacks mentioned in the interviews included the support required attendance at franchisor meetings which were held at the end of an already long day and therefore seen as burdensome. The support was sometimes misguided as many of the participants had prior hospitality experience but not business experience and, the training and support focused on the hospitality side of the business. In order to cope with this shortcoming the owners had to retain outside accounting staff. This was at great cost and frustration. As Case Fra1 said, it was essential to make additional revenue to cover these extra costs and for all the extra revenue there were additional royalties.

The other concern with the support and its impact on work-life balance cited by franchisees, was the timing of it. It was seen as too late, not long enough, or not in good time. For some they said they received no support for the first two months, another explained that it had all but stopped and she had only been in business for eight months. Fra8 indicated that support was non-existent for the first eight months of his owning the business. He also expressed great concern that the business had not been correctly represented at the time of sale and that the franchisor did not provide any support at all to guide them through the resulting financial problems. Fra9 explained that the franchisor knew much less about the business than he did, and that in fact, as the franchisor had changed during his time as a franchisee, support was non-existent.

The other complaint was that it could take up to two months to have somebody visit from the franchisor to provide training. The benefits from appropriate franchisor support were acknowledged as being of great assistance; however, the disappointment engendered by inappropriate support was detrimental to the owners' attitude toward the franchisor and any perceived ability to rely on them. Fra10 stated it was a '*big mistake taking on a franchise*'.

Independent owners relied on family and staff support. It was clear that for some this was possible as they were willing to ask for assistance when necessary. However, for others there was a sense of isolation and an inability to digress from the role of business owner. Some business owners, who had specifically sought out a lifestyle first option with their business, felt they were enjoying the benefits of work-life balance.

The choice of a franchised business model has the *potential* to provide the owners with some options for work-life balance by providing well targeted support that is specific to franchisee needs. However, from this study it appears that this is not generally the case, and the support given does not provide the franchisees with any great benefit over the independent coffee shop owners. In conclusion, it can be said that this business model has the potential to improve work-life balance however business owners need to determine their own priorities and make decisions and choices that satisfy those priorities.

Based on the research conducted, the resultant analysis and the subsequent discussion of the research issues, two models have been developed. These will be of benefit for individuals in both understanding the prioritisation of work in their life, and how they feel about it, as well as being of assistance in checking the balance. These will be introduced in the next section.

4.7 Model development

Based on the literature reviewed in Chapter 2 and on the research conducted for this thesis two models have been developed. The first model (Figure 4.2) considers the dominance of the role of work in the individual's life and the amount of satisfaction they might be deriving from their work. This is the Quantity/Satisfaction Matrix of Work. The second model (Figure 4.3) demonstrates work-life balance; however, the researcher has changed her views on this concept. As a result work and life are not going to be viewed as competing demands; rather work is seen as another part of the life role which has to be prioritised. This model is called the Young's Priority Management Tool (Young's PMT). An explanation of both will now follow.

4.7.1 Quantity/Satisfaction Matrix of Work

The *Quantity/Satisfaction Matrix of Work* demonstrates a relationship between the quantity of hours an individual works and the level of satisfaction he/she derives from the work. The difference in attitude to work by the respondents to this research, and their employees, has been discussed. Some expressed a high level of satisfaction even though they were spending many hours at work, others who were also spending many hours at work were not satisfied although they felt compelled to be present. A final group was working the required number of hours, which was not excessive, and was very satisfied with the outcome. The owners described their employees who

were predominantly casual workers and did not show much loyalty to the business or demonstrating a great deal of reward from their employment. It was commented that they were just making some extra money while they were studying for other careers.

The literature also identifies different attitudes to work such as those who demonstrate such a passion for their work that they love working (Isles, 2004). People choose to spend long hours at work because they derive such great satisfaction from it and it would be possible to say they self-actualise through their work. These people fall into the 'work passion' quadrant. Workaholism (Hill,

1995) is another concept describing an individual who spends excessive amounts of time working, however unlike those with work passion, workaholics are not likely to be deriving great satisfaction from their excessive hours (Russo and Waters, 2006). The excessive hours and low level of satisfaction derived would be what one would expect from an addiction. There is an inability to stop yet the excess does not achieve satisfaction. This is demonstrated in the 'work addict' quadrant.

There are also individuals who are not working full-time and these individuals fit into two categories. There are those who are satisfied with their decreased hours such as those who choose part-time work or are semi-retired and others are not happy with this situation such as unemployed or underemployed people who would prefer to be fully employed (Van Emmerik and Sanders, 2005).

Figure 4.2 Quantity/Satisfaction Matrix of Work

QUANTITY OF WORK	HIGH	Work Addict	Work Passion
	LOW	Underemployed	Self Selected Underemployed
		←	→
		SATISFACTION WITH WORK	
		LOW	HIGH

Source: Developed for this research

The four quadrants represent the extremes of each category but different individuals can categorise themselves at different levels, depending on how they perceive their work and the satisfaction they derive from it. Furthermore, this is not a static situation. There will be times when the work demands are much greater and the satisfaction is lower or the opposite situation might occur. The value of this model is to enable people to consider how they perceive themselves at that particular time. If they feel they are dedicating too much time to their work and they feel dissatisfied then they might place themselves in the work addict quadrant. Based on this, they may reconsider their priorities. On the other hand, if it is just where they want to be, they may be comfortable to continue. Alternatively, one might determine that they are at a stage of business ownership that requires long hours, but they are very excited and happy to be there so they love it. They are in the work passion quadrant. The benefit of this model is evidenced when individuals are able to constantly re-evaluate their situation and make determinations about where they want to be.

It can also be beneficial for the underemployed who may derive some self-awareness about their work-life. If employees are dissatisfied with their situation it can create tension that increases the dissatisfaction, or it can motivate them to change it.

The significance of this model to this research is for business owners to be able to monitor their feelings about their own situations. Prior to reaching a stage of dissatisfaction when they start to feel the frustration they cite in the interviews, they can become aware of where they sit on the matrix and choose a course of action if they so desire. The next model will provide greater assistance in that decision making process.

4.7.2 Young's Priority Management Tool

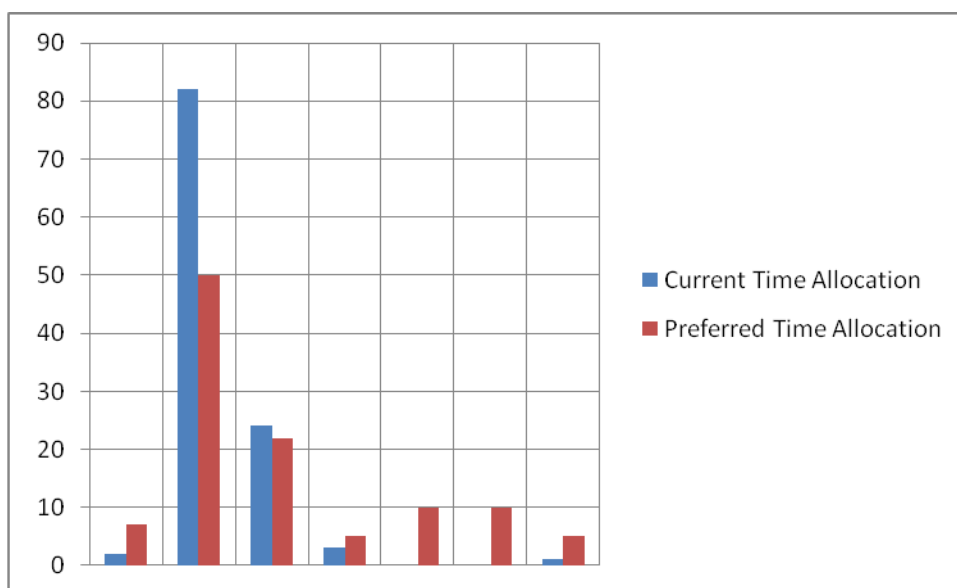
Work-life balance is the term commonly used in the research to describe the 'balancing act' with which individuals are constantly involved. As a result of this study *Young's Priority Management Tool* has been developed as it incorporates the concept of work-life balance, however it no longer differentiates work and life as two opposing demands. Rather, the model acknowledges that the individual has a life and within that life there are a variety of different roles that he/she chooses to play. These roles are determined by individual choice and will vary at different stages of life. Roles including work (either as an employee or business owner), family person (including being a child, parent, partner or sibling), social, financial and personal pursuits all impact on the demands of

each person. Allocating sufficient time to all of these is a challenge for everybody. Hence, the model takes an individual's life and does not attempt to separate work out as a competing factor. Instead it incorporates it as one of the multiplicity of roles played by each individual.

Figure 4.3 Young's Priority Management Tool

Priority	Category	Current Time Allocation	Preferred Time Allocation
1-High	Health	2	7
1-High	Work	82	50
1-High	Family	24	22
2-Medium	Finance	3	5
2-Medium	Social	0	10
2-Medium	Hobbies	0	10
3-Low	Personal Development	1	5
		112	109
		0	3

	Work	Life	Total	
Mon		10	6	16
Tue		10	6	16
Wed		10	6	16
Thu		10	6	16
Fri		10	6	16
Sat			16	16
Sun			16	16
		50	62	112



Source: Developed for this research

The model includes a set of competing demands a person might face and it allows for the individual to determine how they would prefer to allocate their priorities. Based on the identified roles the individual first determines whether the role is high, medium or low priority. Once these priorities are determined then preferred time is allocated to each priority on the graph. The next stage is to determine the actual allocation of time to those priorities and then compare one with the other. When there is consistency between preference and actuality there is balance between priorities and outcomes.

It is important to realise that these priorities are constantly shifting and that although work might be a dominant factor, at certain times this requires a reallocation for specific reasons. For example Fra7 explained that he had committed to work very long hours at the outset, but since having a family he had felt frustrated coping with the additional demands he felt as a father, so he made changes, including employing a manager. This action was because he had changed his priority. The decision had financial implications however he placed the needs of the family above the cost. Many of the interviewees expressed similar feelings. Ind4 said that as the business was in its early days she had to spend many hours there, but that was expected to change. In the meantime the business was her priority, allowing her brother (partner) to consider his wife and child when making his decisions. Ind1 said her main focus was work. That was what she spent her time doing, however she felt the amount of time she dedicated to the business was the thing she least understood at the outset. Fra9 said that as the economy had shifted he had also reassessed his initial work plan.

Using this model, business owners can be somewhat analytical regarding their priorities and the allocation of the time required satisfy them. They can compare their priorities with their actual functioning. Where there is an imbalance, they can make decisions to correct it or alter the determination of a priority. Work is but one competing demand, not a separate factor that stands apart from life. This tool is not specific to small business owners. It does however, require the individual to take the time to be reflective about what is important and to honestly determine where they are allocating their time.

The benefit of using the two models together is that if one is able to determine if work quantity is high but is providing a high level of satisfaction and he/she wishes to prioritise it, the Matrix provides guidance as to how much time to allocate. If work quantity is high and satisfaction is low then perhaps the Matrix will guide individuals to assess where the sources of such imbalance occur based on the Priority Management Tool.

The use of these models will be discussed in the following section.

4.8 Model testing and follow up interviews

Based on the results of this research two models have been developed with the aim of enhancing a users' work-life balance. The models can be used separately or concurrently. The researcher sought to test the utility of the models with some of the participants in the study and the resultant findings will now be discussed followed by a summary of subsequent interviews that were conducted with half of the participants of the initial interviews (Table 4.3). The 10 cases included in the follow-up interviews were plotted in their relevant quadrants (See appendix 5). The Priority Management Tool will be demonstrated with samples from some of the cases studied, using the model and their resultant graphs (See appendix 6).

Table 4.3 Summary of results of follow up interviews										
Cases	Ind1	Ind3	Ind6	Ind8	Ind10	Fra4	Fra6	Fra8	Fra9	Fra10
Is the model useful?										
Yes, it demonstrates visually where roles are allocated	✓		✓	✓	✓	✓	✓		✓	✓
Yes, helps think about priorities	✓								✓	✓
No, does not show anything new		✓						✓		
Does this model inform about work-life balance?										
Yes it clearly demonstrates imbalance	✓				✓		✓			
Yes it shows what was suspected				✓						
Raises awareness about personal situation			✓		✓	✓	✓		✓	✓
Nothing new is shown		✓						✓		
Anything you would like to change in your current allocation?										
Less work	✓					✓	✓	✓	✓	✓
More family					✓		✓			✓
More social, hobbies, health, pd	✓		✓	✓	✓	✓				✓
No		✓								
Is this a useful personal management tool?										
Yes it makes it clear how to reallocate time				✓	✓		✓			
Yes it can be used as a monitoring/planning tool	✓		✓		✓	✓	✓		✓	✓
Yes it highlights potential areas of imbalance clearly										
No it does not provide any new benefits		✓						✓		
Recent thoughts about work-life balance										
Yes have made substantial changes	✓		✓							
Yes have made some changes					✓	✓	✓		✓	✓
No have no need to change		✓								
No have no opportunity to change				✓				✓		

Table 4.3 Summary of results of follow up interviews										
Cases	Ind1	Ind3	Ind6	Ind8	Ind10	Fra4	Fra6	Fra8	Fra9	Fra10
Recent changes										
Sold business	✓									
Expanded or planning to expand		✓	✓				✓		✓	
Changed working hours					✓					
Added leisure activities			✓		✓					✓
No changes				✓		✓		✓	✓	
Economic impact										
No change		✓								
Business decreased			✓				✓		✓	
Financially challenged				✓				✓		
Business increased					✓					✓
No comment	✓					✓				

Source: Developed for this research

An explanation of the matrix was provided to those participants who had agreed to participate in a subsequent interview. The researcher asked them to consider their situations and to plot themselves on the matrix in the position that most adequately reflected where they felt they were in terms of quantity and satisfaction of work. These results (as seen in Appendix 5) revealed that most of the interviewees considered themselves to be in the 'work passion' quadrant as they had a high number of hours and derived a high level of satisfaction from going to work. There was variation within the quadrant however as some said their satisfaction was not as high as it could have been.

Two interviewees Ind1 and Fra10 indicated they were in the work addict quadrant. This was shown by the high quantity of work and low level of satisfaction. Respondent Ind1 had sold the business prior to the second interview and felt that the low satisfaction level was one of the reasons she had made the decision to sell. The reasons she cited for feeling this way were; the inability to have a social life as a business owner, and the resultant impact that had on her partner. Fra10 was experiencing low satisfaction because he was dissatisfied with being part of a franchise system. He believed his satisfaction would be much greater if he was not obliged to pay royalties and other costs of which he was only now becoming aware.

Although Ind8 indicated she was in the work passion quadrant she did qualify that, explaining that as she was completely dissatisfied with the financial performance of the business it was difficult for her to determine the most appropriate quadrant in which she should be placed. This financial situation was similar for Fra8 yet he too indicated he was in the work passion quadrant. Furthermore he explained he is the type of person who loves to work and would always fill his time. Respondent Fra9 said he was high quantity and high satisfaction followed by *"I still love coming to work"* thus indicating he was somewhat conflicted about how he perceived the challenges of business ownership at different times. Respondent Ind10 is passionate about his work therefore his identification of the high/high quadrant was not unexpected. The change of attitude for Ind6 from the initial interview to the second was remarkable, as he had previously explained that he 'hated' what the work had done to his life but now classed himself as being 'passionate' about his work.

Overall the respondents indicated they were in the 'work passion' quadrant however, there may have been a bias against identifying the 'work addict' quadrant due

to a negative connotation of the word 'addict' although when, the respondents were asked if the name was an influencing factor, most replied in the negative. The Young's Priority Management Tool was then introduced to the participants and the findings are discussed in the following section.

The Young's Priority Management Tool (PMT) was developed as an analysing, planning, and management tool. It aims to guide the user in determining their priorities based on six predetermined roles. The individual is asked to determine what priority they place on each role is in their current situation, and how they allocate their time to accommodate that level of priority. They are then asked to determine what would be their preferred allocation for this role. Once these allocations are made the user is able to see how closely aligned is their current and preferred allocation, thus realising whether some roles are dominating in a way that may feel unsatisfactory.

Most of the respondents who tested the model said they felt it informed about their work-life balance. Responses ranged from a rise in awareness regarding their situation, to clearly demonstrating an imbalance. For two respondents the revelations were not new. Respondent Ind1 felt the graphic *"provided a snapshot of where you are with your different roles in life"*. Respondent Ind8 said she felt the model provided a clear picture of her current allocation of priorities and that it was *"problematic that she currently only had two roles"*. The response from Fra4 was enthusiastic as he explained *"the picture tells lots"*.

The initial allocation of priorities provides the user with an analysis of their situation which can then be used for planning and managing the role allocation. The main areas of concern are where the user has identified large gaps between the current and preferred allocations, as these gaps highlight areas of tension and dissatisfaction. From a planning and management perspective the user can plan to reallocate time to various other roles depending on the priorities they have identified. Most of the respondents indicated they would find the PMT a useful personal management tool. The two respondents who did not think the tool provided them with any new information also felt it would not provide any benefits for managing work-life balance.

Several of the participants discussed how the tool would be useful. A situation raised by Fra4 was that he felt he had no time for a social life, however when he looked

at his time preference and allocation, he realised he would have time if he managed his priorities more effectively. He commented *“I think about work all the time, it takes over but using this tool it seems clear there is time to fit in social activities I just need to plan them”*. After looking at his priorities graphically, Fra6 saw the benefits of the PMT as a planning tool as he could *“see how I am allocating my priorities and plan my life a bit, I can recognise there are school holidays approaching so I can plan to spend some time with the family”*. Both respondents Ind10 and Fra10 reacted positively to the PMT as a planning and management tool. They saw value in keeping the graphic and doing a monthly review to monitor their situations while planning to incorporate lifestyle in their month’s activities.

While the response to the Young’s Priority Management Tool was positive due to its ease of use and the graphic representation of an individual’s situation, the value of taking time to reflect on ones situation is another benefit of the PMT as it raises awareness about an individual’s situation. This awareness is often the precursor to planning and managing a situation. The follow-up interviews revealed that some changes had been made following the initial interview and these changes had occurred as a result of the respondent gaining a heightened awareness of their work-life balance.

Most of the respondents said they had made positive changes in their work-life balance, which included taking a holiday, recommencing a hobby, employing a manager, introducing new systems for staff, employing different types of employees, taking a specific day off without exception and joining sporting activities. When asked about the motivation to make these changes most of the respondents said they had been thinking about it, but after the interview they realised the time had come to act. Respondent Ind6 said he was at a very low point in his life when he realised if he *“did not have something else in my life other than work then he was going to remain very unhappy and not a very good business person”*.

Testing the Quantity/Satisfaction Matrix of Work and the Young Priority Management Tool with the 10 cases provided valuable information for the researcher about the value of these models from both a practical and theoretical perspective which will be discussed in the following chapter of this thesis.

4.9 Conclusion

This chapter includes a summary of results from the questionnaire (section 4.3.1) and the in depth interviews (section 4.4.1). There is a detailed analysis of these data sources (sections 4.3.2 and 4.4.2) followed by themes (sections 4.3.3 and 4.4.3) that have emerged from these analyses. The interviewer observations (section 4.5) are discussed including their relevance to the other data. Direct quotations are used in the analysis to provide depth to the arguments and to substantiate some of the commentary.

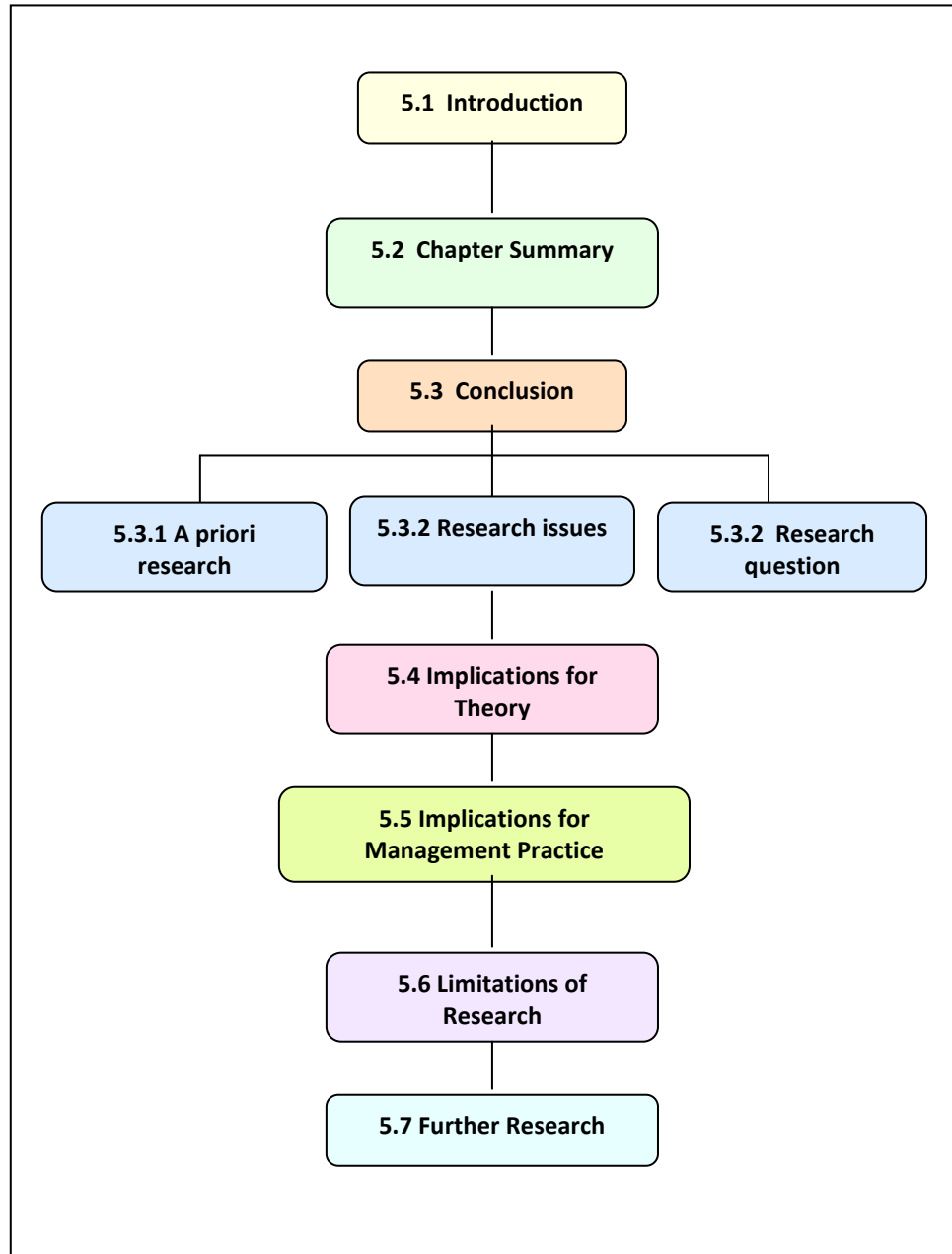
A detailed discussion of the research issues (section 4.6) provided the researchers views based on the analysis and introduced the development of the 2 models (section 4.7) that were developed for this research. These models will be discussed in the following chapter.

Chapter 5 Discussion

5.1 Introduction

This final chapter seeks to synthesise the information provided in earlier chapters in this thesis. First, a brief summary of the preceding chapters will be provided, outlining the key sections of each chapter. Next, a discussion of the research question and subsequent conclusions is provided. Based on these conclusions, the theoretical contribution of this research (including a further explanation of the two models that have been developed and were introduced in Section 4.7) will be explored. Next, implications for management practice will be discussed, within the context of individual business owners and franchisors. Finally, limitations of the research and areas of further research inquiry will be identified. The chapter outline is summarised in Figure 5.1.

Figure 5.1 Outline of Chapter 5



Source: Developed for this research

5.2 Chapter summary

This thesis consists of five chapters and each chapter will now be briefly summarised. Chapter 1 provided an outline of current research in the fields of work-life balance, small business and franchising (Section 1.1). This outline demonstrated that although prior research has been conducted in these fields separately (Dex and Scheibl, 2001; Towers

et al., 2006; Clutterbuck, 2004; Stanworth and Kaufmann, 1996; DeLollis, 1997; Frazer and Weaven, 2007; Weaven and Frazer, 2006) there has been limited research in which these issues are examined together (Walker et al., 2008; Shelton, 2006; Daniels, 2004; Loscocco and Smith-Hunter, 2004). The research issues and research question were introduced (Section 1.2) and the justification for the research was discussed (section 1.3). Based on the type of research question and issues, the methodology that was deemed to be the most suitable for this study was introduced (Section 1.4). Delimitations to the research were also explored in Chapter 1 (Section 1.5), and definitions of the concepts used throughout the thesis were presented (Section 1.6).

Chapter 2 provided a detailed review of the literature including some of the most recently published research in many of the areas covered in this research (Dant, 2008; Duckett, 2008, Eikhof et al., 2007; Peus and Traut-Mattausch, 2008; Walker et al., 2008; Roberts, 2007). Specifically, the research domains examined, included the literature used to determine a definition for work (Section 2.2.1) and a definition for life (Section 2.2.2) which were then used to determine what constituted work-life balance (Section 2.2.3). The concept of work-life balance was discussed in terms of the current research which has tended to focus on employees (Section 2.6) and large organisations (Section 2.7). Existing literature that examines independently owned small business was examined (Section 2.8) and then both the literature relating to franchised and independently owned small businesses was reviewed (Section 2.10). As, agency and resource theories are relevant to franchised businesses, the literature examining these theories was considered in the context of work-life balance (sections 2.11 and 2.12). Following this the research questions and issues that emerged from prior research were developed. Finally, the expected findings based on the a priori research were introduced as is consistent with the realist paradigm (Section 2.14).

Chapter 3 explained the chosen methodology for the research. The appropriateness of a qualitative research methodology for this study was explained (Section 3.2) including an explanation of epistemology and ontology (Section 3.2.2). There were several paradigms encompassed within the qualitative methodology and some of those paradigms were compared (Section 3.3) prior to justifying the selection of the realist paradigm as the most suitable for this research (Section 3.3.1). The chosen method for conducting the research was case studies and the rationale for their use was explained (Section 3.4). Throughout, the researcher was aware of the importance of

ensuring quality in any research project by adopting good research design and appropriate data collection methods (Section 3.4.3). Furthermore the researcher was cognisant of the need to ensure the validity and reliability of the data and the measures undertaken to ensure this are explained in Section 3.4.3.4. The conduct of the research was discussed in Section 3.5, including some reflections on experiences the researcher had during the data collection process. Data analysis was explained (Section 3.6) as it was through the process of turning the data collected into manageable themes that the researcher was able to interpret the findings. All the research was undertaken according to the ethical requirements as set out by Griffith University Human Research Ethics Committee (Section 3.7).

Chapter 4 summarised and analysed the results of the data collected. The objectives of the research and the analysis were outlined (Section 4.2) providing clarity regarding the information being sought from the data collected. A summary, analysis and discussion of the emergent themes from the questionnaires are discussed in Section 4.3. The interviews were the second data source (Section 4.4) and they were also summarised and analysed. The interviewer observations were discussed (Section 4.5) including the different type of information that was conveyed non-verbally. Based on the findings identified in the previous sections research issues were considered and discussed and some conclusions were drawn (Section 4.6). Two models were developed, based on the findings, and these models were introduced (Section 4.7). The research question and the model will be discussed in greater depth in this chapter (Chapter 5).

In this final chapter conclusions about the research (Section 5.3) based on the findings outlined in the research issues are presented. The research question is discussed and conclusions drawn based on the findings, and are compared to the initial expectations (based on the a priori literature in Chapter 2). The contribution to theory from this research is discussed (Section 5.4) including an explanation of the (developed) models and feedback provided by respondents who have since tested the models in practice. The contributions to management practice will be discussed (Section 5.5) including an explanation of how individual business owners and franchisors may use the findings of this research to improve lifestyle management through self management, training or operational modifications. The research limitations will be examined (Section 5.6) and some suggestions for future research (Section 5.7) will be made. In the next section, the research issues will be discussed.

5.3 Research conclusions

5.3.1 Expected outcomes based on a priori research

The review of the literature in Chapter 2 indicated that specific factors would influence an individual's work-life balance and the factors identified as important were organisational policies, role conflict, gender bias, generational impacts and attitudes to work. Much of this research is based on research conducted in large organisations and focuses upon what these organisations can do for their employees to enhance their work-life balance (Posig and Kikul, 2004; Hacker and Doolen, 2003; Brough et al., 2005). Initiatives such as providing flexible work arrangements (Maxwell et al., 2007; Lewis et al., 2003), different leave options (Lewis, 2001) and providing technology so that individuals can work from a variety of locations including home offices (Towers et al., 2007) are some strategies used by organisations to facilitate an individual's work-life balance.

An identified business case (Tomlinson, 2004) providing the above opportunities for employees, has shown a reduction in turnover and absenteeism. However, there may be a cost involved especially in terms of leave provisions including carer's leave and personal leave. This research has focused on small business which are typically less well resourced than larger organisations (Litz and Folker, 2002), where provision of work-life balance initiatives represent a significant cost to the owner. This research is specifically investigating the opportunity for the owners of small businesses to enjoy work-life balance. As the owners are ultimately responsible for the profit of the business and gain the financial reward associated with taking on the risk of business ownership, there is less likelihood they will engage in many of these work practices to provide themselves with time away from the workplace.

The most useful policy for small business owners is to use casual staff as they are then able to alter the size of their workforce in response to market demand (Blyton, 1991). Prior research has shown however, that owners have identified that employing a predominantly casual workforce may be disadvantageous, as employees tend to have limited loyalty and commitment to the work. This may be detrimental as the staff may

reflect this attitude in actions such as increased levels of absenteeism or job turnover. Thus these problems impact the owner directly; the constant turnover of staff requires frequent retraining of employees at a cost to the organisation and the owner is required to spend time attending to training rather than to business operations. In the case of absenteeism the usual replacement for the absent staff tends to be the business owner. Several of the interviewees mentioned that many times when they were about to leave after working for several hours, an employee will call in sick and the owner would have to remain in the workplace to cover this absence.

Therefore, as the a priori literature demonstrated many of the policies are applicable and particularly useful to large organisations, yet their utility in the small businesses under investigation is limited, particularly when examining the work-life balance of business owners.

The issue of role conflict (Shelton 2006) occurs when people have a multiplicity of roles to fulfill and feel tension when allocating priorities to these different roles. These roles can include those of employee, parent, partner, child, community member, team member, or involve a desire to commit to a hobby or personal development program. The more roles an individual has, the more challenging it becomes to ensure there is sufficient time to meet these various demands. Hence individuals have to make decisions about managing these choices in order to maximise their levels of satisfaction.

Choices amongst roles impact on balance in terms of an individual's perception of a situation or how he/she manages it. For some, the challenge is managed by reducing their roles by taking on part-time work for example (Sheridan and Conway, 2001). Some people who start their own businesses intentionally keep them small so they can fill alternative roles (Walker et al., 2008), or they enlist the help of others so they can reallocate the different roles they play (Shelton, 2006). Many of these choices have a financial impact so the individuals are put in a situation of conducting a cost benefit analysis to determine how best to allocate priorities. *The research into role conflict is reflected in this research.* The individuals who participated in this study did identify a challenge in quantifying and allocating priorities to the various roles they possessed. For some participants there were fewer roles to balance as they were single and had no 'family demands'. Others who managed family and work had support from a variety of sources which allowed them to attend to a multiplicity of roles, however there

were some who found themselves in a situation where work had taken over and they could no longer tolerate it, so they were divesting or discontinuing business operations. The belief amongst these participants was that being an employee did not create the same level of role conflict as that entailed by being a business owner, because as an employee because the separation of ownership and employment reduced the problem.

Therefore it appears that role conflict is a challenge for the participants in this research in the same way it is explained in the extant literature. It differs in that business owners are less able to minimise their role of worker as they feel concern or feelings of total responsibility for the business, whether they are in attendance, or apart from the workplace. This situation was explained by many of the interviewees when they commented that it was often better for them to be at work rather than to be away and worry, because they felt responsible for outcomes irrespective of where they were.

Gender was an issue that regularly arose in the literature suggesting that the initial impetus for work-life balance initiatives was to enable women to attend to work and family demands (Noor, 2004; Bardoel, 2003; Lambert and Haley-Lock, 2004). Many of the policies seemed to be designed to allow women to attend to family needs and work responsibilities. In Australia part time work positions are more often filled by women than men (ABS, 2005) and it has been suggested that this is due to the perception that work is a supplementary role to the parenting one. Some work has considered how women in small business might keep these businesses small so they can balance competing work and family demands (Shelton, 2006). Another gender based issue identified previously was the negative impact that accessing work-life balance policies might have on an individual's career. The research indicated that employees believed that their careers could be harmed by making use of available work-life policies (Tomlinson, 2004; Wise and Bond, 2003).

The outcomes of the research (as will be discussed in detail) did not differ based on gender. As owners, the issues faced with respect to work-life balance were similar for both men and women. Being an owner of the business did not necessarily provide female owners with the opportunity to work part-time. In fact the excessive demands on their time had encouraged two female owners to sell their businesses as there were no other alternatives for achieving their desired family time. Keeping these types of business small was not really an option because, irrespective of size, there were time

requirements placed on them to provide ongoing customer service. These requirements were based on franchise agreements, shopping centre leases and customer demands.

Using work-life balance policies would not impact on the owner's career as much as it would impact on the financial performance of the business as they would be required to employ staff to replace them to do the work. Again this implication was not gender based; it was consistent for male and female operators. *Thus the a priori literature does show there can be gender bias in how work-life balance is managed, yet this does not appear to be consistent with current small business situations. The business owners are subject to the same challenges and issues irrespective of gender.*

The impact of different generations' attitudes to work was identified in the prior studies and was based on the requirement to manage different attitudes to work and life priorities. Currently there are three generations in the workforce leading to unique management challenges as the different attitudes to work blend (Westerman and Yamamura, 2007). Prior research found that there are management challenges between 'Baby Boomers' and Generations 'X' and 'Y' (Sirias et al., 2007; Martin, 2005). *Consistent with this perspective, this research found generational influences upon work-life balance in small businesses.* In coffee shops, employees tend to be young people who are working casually to earn income to support themselves whilst pursuing other activities such as school or university. The interviewees explained that they faced many challenges with employing Generation 'X' and 'Y' members as they tended to be less committed and were not inclined to provide a high level of service to customers. Consequently there were challenges with staff absenteeism, staff turnover, attitude problems and customer complaints.

Typically, Generation 'X' and 'Y' have been found to be somewhat challenging in the workplace as they tend to prioritise lifestyle over work (Glass, 2007) and they do not always commit to working for organisations in the long-term (Martin, 2005). They also have limited loyalty to organisations and tend to move readily from one job to the other (Westerman and Yamamura, 2007). The owners of these coffee shops also identified another challenge in that hospitality is not often viewed as a career, and as a result the employees tend not to remain long term.

This situation impacts on the owners work-life balance as they are constantly hiring and training in the quest to find sufficient suitable employees. Often they would find themselves having to work longer hours just to ensure adequate staffing for the business. Some of the interviewees explained that they have a renewed focus on attracting more mature workers who have a different attitude to work and more loyalty to their employer, as a way of ensuring continuity of staffing arrangements (which has some support in the literature e.g. Marcinkus et al., 2006). *Therefore it can be concluded that the generational impacts are similar in small and large businesses, however turnover can be more difficult to manage in small business retail situations such as coffee shops as that work tends not to attract career minded people who are seeking long term employment.*

Perceptions and attitudes to work can be diverse and much of the literature tends to view work as something that needs to be reduced (van Emmerick and Saunders, 2005). Concepts such as workaholism (Burke, 2000a) indicate that too much work can be detrimental to the employee's well being. Hence, the aim of work-life balance policies is to reduce the number of hours one spends working through the provision of a multiplicity of policies (Lewis, 2001) ensuring that the work can be completed while also allowing employees to participate in other activities. Possibly policies which enable employees to take their work away from the office (through providing them with the technology) has been advantageous to the organisation but has intruded on the life of employees (Towers et al., 2006).

This intrusion into life may not be perceived negatively should the employee derive a great amount of satisfaction from his/her work. As Isles (2004) in Eikhof et al. (2007) suggests, there are some people who enjoy their work so much that they want to spend long hours at it and they are satisfied with this situation. Prior research identifies that these different attitudes to work exist and that this is confirmed in this research. There are some business owners who spend up to (and in excess of) 80 hours a week working in their business but do not wish to change the situation. There are others who feel that the hours they spend there are excessive and feel compelled to divest in order to regain control. *Therefore this research is reflective of the findings of earlier research in that the attitude to work impacts on how the individuals perceive their work-life balance.*

This research sought to investigate a gap in the existing literature and as a result of the above review; research issues were developed to determine areas of difference. As a consequence the findings in the research issues are not discussed in depth in the current literature. A synopsis of the findings through a brief discussion of the research issues will demonstrate the areas where new concepts have been revealed with respect to work-life balance in small business and through comparisons between franchised and independent business.

5.3.2 Research issues and research question

Through analysis of the data the researcher was able to address the research issues based on the new findings and with reference to the literature discussed in Chapter 2. How these findings answer the research question will be examined in this section of the chapter.

Research Issue 1a: *To what extent do individuals determine their work-life balance?*

b: *To what extent is work-life balance of concern to them?*

Although work-life balance appears to be well established as an area of research in organisations, the findings of this research revealed that many of the participants had not considered it as a factor that was an important antecedent in their decision to enter into buying a coffee shop. Some respondents did make this a key consideration and had chosen the specific business that suited their lifestyle, but many of the respondents showed frustration with their work situation and explained that they had not previously considered it in terms of their work-life balance. They were able to explain that staffing and the hours required by the business was at times overwhelming, yet they had not taken the additional step of recognising that these factors were limiting their opportunities to pursue other activities. The frustrations tended to arise as a result of having a multiplicity of roles to fill, or from having one role take a dominant position, thus limiting any variation in their lives. They sense a lack of control over their own outcomes, yet this was one of the identified reasons for a becoming business owner. *Hence how these respondents determine their work-life balance is an individual response and individuals are required to determine what matters most to them in order to establish priorities and allocate time to best accommodate these priorities.*

Research Issue 2: How does starting a small business provide an opportunity for individuals to improve their work-life balance?

As identified in Chapter 2 much of the research into work-life balance features larger organisations and there is minimal literature about how these opportunities can be available for owners of small businesses. This research has shown that many of the policies that are designed to enhance work-life balance are employee focused and do not apply to owners of retail coffee shops. The potential to improve balance through the use of flexible hours or place of work, does not apply to these businesses as hours are mostly predetermined and the place of business is where the customer is, at the retail site. In fact the use of home offices and technology has *extended* the work day for these owners as they are required to complete many of the administrative tasks away from the shop. Therefore, if work-life balance is determined based on access to policies, (as recognised in the literature), then starting these small businesses will not improve work-life balance.

The owners' feelings about the entering into these businesses were generally positive. When asked if it was the right decision to open the coffee shop, 18 out of 20 participants agreed and a further 2 qualified their response in the affirmative. This response was consistent amongst franchisees and independent owners even though four owners in the sample had decided to sell the business, three had had their marriages break down whilst owning the business, three were facing very trying times financially, and the majority were regularly working 60 hours or more a week. Therefore it would appear that the traditional way of viewing work-life balance and determining how one achieves this may not apply in these cases.

An alternative view is that perhaps the traditional way of considering work-life balance is inappropriate for small business owners. The satisfaction they derive from owning and running their business may impact on how they view the hours they need to dedicate to work activities. An aspect of business ownership that assisted with work-life balance was the feeling of being in control. In particular, business owners felt they were making decisions about their lives rather than being dictated to by employers. Some participants explained that they were happy to work long hours as they were benefiting themselves and they derived a sense of achievement from self-employment. *In summary, the opportunity for work-life balance may not improve if it is considered from*

a traditional viewpoint. However, if it is redefined (based on the opinions of some of the participants in this study) then there is a possibility that business owners may aspire to have some positive outcomes if they can be in control of allocating their work and life priorities.

Research Issue 3: *To what extent does small business ownership provide individuals with greater control over their lives?*

As identified in Research Issue 2 the issue of control impacts significantly on work-life balance and as one of the identified reasons for small business ownership is to achieve some control over one's life (Smith, 2000; Buttner and Moore, 1997) this research sought to determine whether this had occurred. The views expressed by the participants in this study were consistent with findings reported in the extant literature in that many of them identified achieving some control over their lives as a primary reason for entering into small business. For some they felt the control was limited by factors such as franchise agreements, shopping centre leases, and customer and suppliers demands; overall however, there was a sense that they had control over many aspects of their own decision-making.

Some identified control over their financial future as a significant factor and many indicated that this was either in the process of being achieved or was achievable in the future. Considerations that had a significant financial impact included how many staff were required to run the business effectively, how much rent was being charged, how high the royalties were, and how they were being charged.

The critical factor in deciding whether the participants felt they were in control appeared to be whether they felt that the *decisions* they were making were based on what they wanted to achieve. If the decision was about opening hours were they the hours the owner wanted to be there? If the owner desired some time away from work and this necessitated employing additional staff, the question usually centered around costs and benefits (i.e. a choice between wages and time away from the business). This issue of control is therefore one about having choices and determining whether the resources are available to make the preferred choices. There were some participants in this study who felt they had control, but also felt so burdened with responsibility for the business related demands, that they felt less in control of other aspects of their lives.

Thus the findings suggest there are opportunities to be in control in the business but at times the responsibility for the business dominates to such a degree that control is lost in other areas.

Research Issue 4: *To what extent does the business model (franchised vs. independent) affect work-life balance?*

Prior studies into work-life balance did not provide any insight into how and why work-life balance might be affected by different business models. This research has compared franchised and independently owned small business. One of the influential factors in helping the participants derive some sort of balance in their lives was their access to support networks and this highlights one of the key differences between the franchisees and the independent owners. The independent owners identified family and staff as their main support, although some expressed that they had no support, (one respondent was left feeling completely isolated).

The issue of support and established systems was however, frequently identified by franchisees as a reason for choosing that business model. In particular, the expectation of support when entering into these businesses provided franchisees with a sense of comfort when entering self-employment. Many of the participants expressed satisfaction with the manuals and established systems their franchisors had provided, but there were some significant issues with the levels of ongoing support. Some franchisees expressed satisfaction with the support and felt they were receiving value for money, and one interviewee was assured that franchisor support would be available if she needed time away from the business. However many others expressed dissatisfaction with the level of support.

Concerns were raised about the ability, appropriateness, timing, consistency, access to, and duration, of the franchisor support. When this was considered in relation to the amount of money spent on royalties, disappointment with the relationship was often obvious. *Thus it can be concluded that although there is an opportunity for the franchised business owners to have some work-life balance if they were being provided with adequate support, it appears that franchisors are not providing what the franchisees perceive as sufficient support or the support appears to be misguided.*

Research question

The research examined the following research question:

“How and why does work-life balance differ between a franchised business and an independently owned (non-franchised) business?”

The findings indicate that there are many variables that consistently influence work-life balance across both franchised and independent business models. The challenges and rewards of running a small business identified by owners were similar across both models and locations. Most commonly the biggest challenge faced was coping with staffing issues and this was experienced by both franchisees and independent owners. The most commonly identified reward was good results (including financial, business growth and customer satisfaction). Owners of both types of businesses mentioned other aspects, such as being in control and the loyalty shown by customers and staff. The impact on work-life balance of these challenges and rewards were similar in both models as they all managed within similar conditions.

Participants conceptualised the issue of being in control in different ways. The “desire to be one’s own boss, have greater control over decision making, and greater time flexibility “, were reasons cited by most franchisees and independent owners for starting the business. Achieving this form of control was seen as a way of achieving work-life balance by the owners. Just under half of the participants expressed the feeling that they had improved their work-life balance as a consequence of increasing their control over decision making. This is an important finding because there is an identifiable difference between the two business models when discussing control.

The independent owners felt they had control over their purchasing decisions, menu selections, shop fit-out, suppliers, and in some cases opening hours. However, they were not completely free to make all their decisions as various factors such as the conditions of their lease and customer demands, had an influence on menu selections and opening hours. The franchisees were also affected by lease terms and customer expectations although they had less scope with menu choice as they were limited by franchisor requirements for standardisation. The franchisees recognised that they had purchased a system and that being part of a franchise entailed complying with many predetermined decisions. Although this was viewed as satisfactory by some, others

explained that they felt some of the controls were intrusive and had impacted upon the management of their work-life balance. Some examples of these impositions were franchisee meetings, reporting procedures, support staff calling at 8 pm at night, and inappropriate marketing campaigns that the franchisees had to fund through advertising levy commitments.

Some franchisees identified the disadvantage of having slightly less control in some of the decision making (such as supplier choice) was largely offset by the benefit of not having to spend valuable time sourcing products. Therefore the concept of control is important to both franchised and independent business owners, however the findings suggest the franchisees have less opportunity to be in control of all aspects of the business. The initial expectations of how much freedom to make decisions the owner was expecting, may influence how they perceive the impact of the controls imposed. *Thus it can be said that independent and franchised business models differ due to the number of predetermined decisions utilised in the operation of a franchise. The impact of predetermined decisions can affect work-life balance in different ways. Positive outcomes mainly relate to less demand on the franchisee to develop a new system and source new information continuously, thus increasing available discretionary time for alternative activities. However, a contrary argument may be that being subject to a variety of controls and requirements may impact of the owner's time and adversely affect work-life balance if the controls are viewed as intrusive.*

Access to support networks is a mechanism available to business owners to enhance their work-life balance. However, sources of support for independent owners are limited compared to franchisees. This is one of the most noteworthy areas of difference between the two business models relevant to work-life balance. The independent owners identified their families or staff as the main support networks and some said they had no formal or informal support. In contrast, franchisees nominated that they had the added support of the franchisor, and one participant identified other franchisees in the system as being valuable in providing guidance with respect to their experiences in managing coffee shops. The sharing of these experiences helped build the franchisees understanding of running the business therefore reduce the time required to learn the work processes and increased the time available for alternate activities. The influence of having support networks on work-life balance is significant. For owners who have a multiplicity of roles and need to be able to leave the business it

is essential to have reliable staff so they can ensure business operations in their absence. For some the support is not required in the workplace, but is at home. Some participants indicated that they relied on partners to manage the home while they managed business operations. Some had to hire third party support for tasks such as payroll and tax. The difference between the models is that franchisees felt they had an additional level of support in the franchisor. This is how the two models differ, but the research identified shortcomings in the types and levels of support provided.

Support offered by the franchisor was not necessarily that expected by the franchisee and contributed to a franchisee's frustration with the franchisor. This was not limited to one system. The study included six different franchise systems and all were criticised by incumbent franchisees on this criterion. One franchisee was very enthusiastic about the support the franchisor provided while other franchisees from the same system showed great disappointment. *This indicates that their experience is most likely based upon individual perception but there is a gap between what is expected from the franchisees and what the franchisors are currently delivering.*

These unrealised expectations were a source of discontent for the franchisees as they explained that they have to work harder to earn sufficient money to pay the royalties that are charged on their revenue. Thus the impact is felt on their work-life balance as they feel they are working to pay royalties to enlist support that should make running the business easier and therefore provide them with a satisfactory lifestyle.

In summary there is little that differentiates work-life balance between the two business models as both independent and franchised business owners face similar conditions. There is a need amongst all the owners to develop a clear understanding of what roles they want to fill in their life and how they can allocate their priorities to ensure they are able to derive satisfaction from their working and personal lives. Furthermore, the owners need to determine expectations about the business and the amount of control they can realistically have over their outcomes, and to make choices based on these expectations. Therefore if the owner wants freedom with the operational activities such as the menu, then a franchised business is most likely unsuitable. Establishing and developing suitable support networks is essential in providing the owners with an opportunity to engage in the multiplicity of roles they play. There is an opportunity for franchised owners to derive better work-life balance when

franchisors address the issue of providing suitable, well designed and adequate (initial and ongoing) support.

The theoretical contributions of this research are presented in section 5.4.

5.4 Implications for theory

There is an established body of research concerning work-life balance in many settings yet the number of studies within the context of small business ownership (for example Shelton, 2006; Walker et al., 2008; Loscocco and Smith-Hunter, 2004; Maxwell et al., 2007) is limited. To date, comparative studies about this concept between franchised and independent business owners are lacking. Hence this research has contributed to the literature through extending theory that is specific to small business owners in franchised or independent self-employment. Two models have been developed that can be used for the future enhancement of managing work-life balance for small business owners, based on the findings of this research and through consideration of prior research. An individual's perception of the role of work differs, ranging from seeing it as an unhealthy intrusion, as they work long hours and derive little satisfaction from their effort (Russo and Waters, 2006), to committing very long hours and deriving high levels of satisfaction which has been described as "work lust" (Isles in Eikhof et al., 2007 p. 328).

In addition, there are individuals who have a part-time engagement in the workforce and this can be through choice or as a result of circumstance. Part-time work is more commonly filled by women as they see the role as secondary to their other roles (Sheridan and Conway, 2004). The choice of part-time work can facilitate the balancing of a multiplicity of demands however, research has shown this choice can also be career limiting (Tomlinson, 2004). The problem of limited career opportunities may not be a problem for some employees if they are satisfied with their choice of part-time work whereas for some individuals this limitation may be detrimental. Consequently the extant literature highlights that there are different attitudes to work and individual perceptions tend to vary depending on the quantity of work being undertaken and the satisfaction the individual derives from the situation. Based on the existing literature

and the findings of the research a model has been created that combines these concepts. The model is called the Quantity/Satisfaction Matrix of Work.

The issue of role conflict (Shelton, 2006; Walker et al., 2008) is another challenge facing individuals as they strive to achieve balance in their lives. The prior research demonstrates that organisations develop policies aimed at providing employees with flexibility in their working lives (Maxwell et al., 2007; Lewis, 2003; Tower et al., 2006), and the aim of these policies is to enhance the employees' work-life balance. The use of technology can present individuals with the opportunity to conduct work at all times and places therefore enhancing flexibility. These innovations can also extend the work options so employees can be accessible to or for work at all times (Tower et al., 2006) therefore this technology can be viewed as beneficial or detrimental depending on the individual's preference for working practice.

The extant literature acknowledges that work and life do not have to be conflicting roles (for example Lewis, 2003) and that the boundaries between these two activities are becoming blurred. The use of the many initiatives made available by employers, the changing technology and the various attitudes to work have created an environment where employees can make work-life balance choices. The challenges for managing the demands of the multiplicity of roles in life faced by small business owners are somewhat different to those of employees.

This research builds on existing research to incorporate the concepts of flexibility, role conflict and blurred boundaries and adapts them for a business owner. Where an employee relies on policies and the organisation, the owner must rely on self-management for work-life outcomes. Self-reliance incorporates the concept of control in the individuals' decision making and how that can influence their perception of work-life balance, thus, extending the concept of choice as raised by Lewis (2003). Based on the extant literature and the findings of this research a model was developed to assist small business owners to view their lives as composed of a set of roles that can be prioritised and managed to enhance their lifestyle outcomes. Young's Priority Management Tool (PMT) is the model designed to provide the individual with a tool for self reliance in a situation that previous research has tended to view as a provision from other sources.

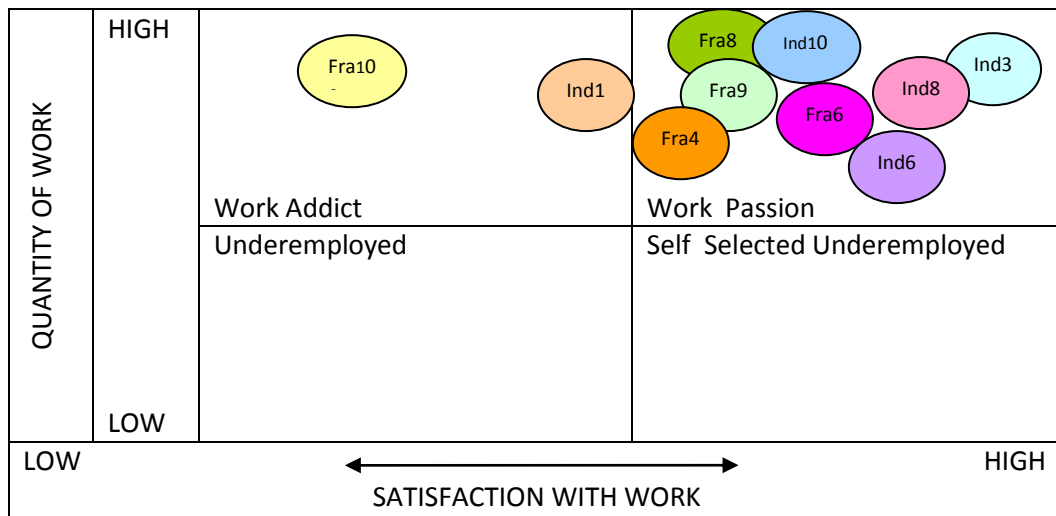
Two models have been developed that can be used for the future enhancement of managing work-life balance for small business owners, based on the findings of this research and through consideration of prior research. The two models were introduced in Chapter 4 (Section 4.7) and they will now be discussed so as to demonstrate their application to theory. These models are beneficial for both franchised and independently owned business owners as it has already been established that they face similar issues in managing business and work-life balance challenges.

5.4.1 Theoretical application of Quantity/Satisfaction Matrix of Work

The Quantity/Satisfaction Matrix has been developed as a guide for individuals to determine the impact work is having in their lives. Work is an integral part of life and the meaning it brings to one person might differ to another. As Isles (2004) in Eikhof et al. (2007) explains, some individuals consider work rewarding referred to it as “work lust” (pg. 328). For others work can be perceived as intrusive and detrimental to their well being (often referred to as workaholism (Burke, 2000a)). There are a number of workers in Australia that work in a part-time mode (ABS, 2005) and therefore they are underemployed.

Underemployment can occur because individuals select this option as it facilitates lifestyle choices or may be due to an inability to find full-time work. This matrix represents these extremes and provides for an individual to place themselves in the appropriate position along two continuums between high and low for quantity of work, and high and low for work satisfaction. In particular, the high/high for quantity and satisfaction is the work passion quadrant, the high quantity/low satisfaction for work is the work addict quadrant, the low quantity and high satisfaction is the self-selected underemployed and the low/low for quantity and satisfaction encompasses the underemployed quadrant. The value of this model is that it is applicable to all individuals. It is not specific to small business owners; however it is a useful tool in facilitating individual level analysis as to how individuals perceive their current situation.

Figure 5.2 Quantity/Satisfaction Matrix of Work Respondents Positions



Source: Developed for this research

Follow up interviews revealed that most of the interviewees considered themselves to be in the ‘work passion’ quadrant as they worked long hours and derived a high level of satisfaction from being in the workplace. There was some variation within the quadrant however as some said that their satisfaction was not as high as they would like.

Two interviewees indicated they were in the ‘work addict’ quadrant. This was due to high quantity of work and concurrent low levels of satisfaction. The reasons cited for feeling this way were an inability to have a social life as a business owner and dissatisfaction with being part of a franchise system. Although some expressed they experienced work passion, there were aspects of the work with which they were not always satisfied.

This matrix can be utilised in theoretical applications as a means of classifying individuals and the mode of work that they desire. It provides insight about whether individuals are in a situation that is sustainable or if they should consider making changes to their level of engagement with the quantity of work and/or whether the quantity of work is beneficial to their overall well being. The matrix allows for this to be viewed from a variety of perspectives as it does not always assume that people are engaged in excessive workloads; rather it takes into consideration the situation of low work quantity (Underemployed and Self Selected Underemployed). The findings of this

research have shown that these business owners are not in a situation of having an insufficient quantity of work so they are more likely to be differentiated by their levels of satisfaction.

The matrix considers satisfaction as an inclusive term and does not allow for differentiated criteria. This was challenging for some of the participants as they explained that they were satisfied with being a business owner, yet they were dissatisfied with the financial performance of the business. Others were satisfied with the customer loyalty they had established in their businesses, but were dissatisfied with the franchisor demands. In addition other interviewees identified satisfaction with their business but were struggling to be content with the hours and personal challenges the business placed on them. The researcher explained that the matrix was aimed towards determining the participants' overall sense of satisfaction and that for a more in-depth understanding of that feeling a more detailed analysis could be undertaken.

These comments indicate the benefits of using the matrix as a complementary tool with the Priority Management Tool as it assists participants in gaining an insight into the potential areas of challenge that they face on a weekly basis with respect to their work-life demands.

5.4.2 Theoretical application of Young's Priority Management Tool

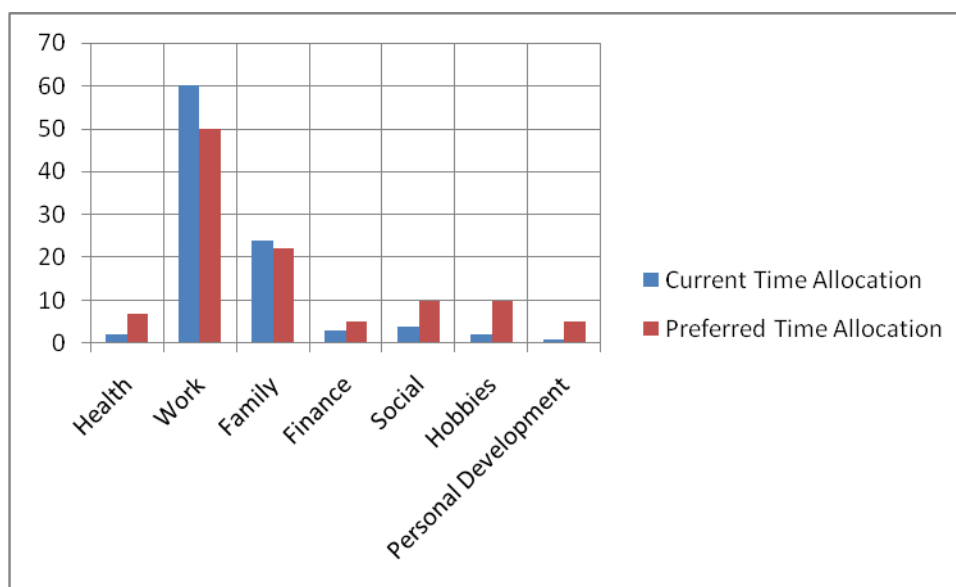
The utility of the Quantity/Satisfaction Matrix of work is enhanced when further analysis is undertaken using the (interactive) Young's Priority Management Tool (PMT) which has been designed to work on Microsoft Excel. It has been designed so that individuals are able to perform self assessments by considering a set of roles encompassed within their lives. These roles include health, work, family, finance, social, hobbies and personal development, and thus relate to many aspects of a person's life that involves many different (and competing) activities. The role of family includes partner, parent, and child, and as such accommodates all individuals. Some of the roles have blurred boundaries, as within the context of health and hobbies. For some a hobby is exercise and this contributes to health, however this does not diminish the usefulness of the tool for it is up to the individual to determine how they perceive that particular activity. All of

the roles can be allocated priority ratings ranging from high to medium to low (See Figure 5.3).

Figure 5.3 Young's Priority Management Tool

Priority	Category	Current Time Allocation	Preferred Time Allocation
1-High	Health	2	7
1-High	Work	60	50
1-High	Family	24	22
2-Medium	Finance	3	5
2-Medium	Social	4	10
2-Medium	Hobbies	2	10
3-Low	Personal Development	1	5
		96	109
		16	3

	Work	Life	Total
Mon	10	6	16
Tue	10	6	16
Wed	10	6	16
Thu	10	6	16
Fri	10	6	16
Sat	10	6	16
Sun		16	16
		60	52
			112



Source: Developed for this research

It is a personal decision about how to prioritise these roles. The next step is to determine how the individual is allocating his/her time (on a weekly basis) to these various priorities, and then to determine how they would prefer to allocate their time. Once this is ascertained, they are able to view highlighted areas of dominance of one role over the other and also areas of discrepancy between current allocation and preferred allocation. The second table in (Figure 5.3) assists the individual to calculate a daily breakdown of the number of hours spent working, and on rest of life activities, whilst allowing for leisure time (e.g. to sleep). This calculation facilitates determining how many hours are spent working during the week.

The purpose of this tool is to guide individuals in the management of the multiplicity of roles they fulfill. The researcher has concluded that the role of worker is but one of many potential roles a person fulfills and to try to separate it is difficult and unnecessary. Instead, it is more realistic to recognise the individual has a life and within that life they have different and competing priorities. As this research has shown that priorities change and at different times one role might dominate whereas in different circumstances it would not have been important if it existed at all.

Therefore the priority management tool is useful from a theoretical perspective as it has been designed as a tool that can assist individuals in small business to develop an awareness of the multiplicity of roles they have in life and that can be overlooked when running a business for which they are fully responsible. This is a significant contribution as to date most of the existing theory about how to manage work-life balance has relied on policies specifically embodied within different organisational structures. When one works in a large organisation as an employee it is somewhat easier to allocate time to competing roles as there are specific policies designed to facilitate other activities. For example personal development may be encouraged by sending people to educational seminars, time to manage family demands can be managed with work sharing arrangements, and health can be attended to with sick leave or special leave provisions. However these opportunities are not readily available for the small business owners who have to ensure that they provide for their own requirements.

The Priority Management Tool provides a means by which life can be analysed, and the competing roles which can contribute to role conflict (Walker et al., 2008;

Shelton, 2006), may be managed by determining their relative priority at a certain point in time. Furthermore it does not have an optimal outcome, rather, the allocation of priorities is based on what the individual is currently undertaking compared to their preference. Thus the design considers that work-life balance for small business owners is related to the amount of control they feel they have over their own decision making. The PMT recognises the need for autonomy in decision making and the desire to change circumstances as expressed by the participants in the research.

This research has expressed the concept that work-life balance is not about available hours, on the contrary, work-life balance is about how a person feels about how they have to spend those hours, and this is reflected in the design of the PMT. The model was tested by 10 of the interviewees (See appendix 6) and the results demonstrated that the current numbers of hours spent working is perceived by individuals as being high. Therefore when used as a compliment to the matrix and taking into consideration that most self-identified that they were highly satisfied, then one is able to determine it is not the quantity of hours, but the ability to make the decision about the quantity, that makes the difference. This determination applies to the other roles included in the tool.

From a research perspective, and to clarify the contribution to theory, the participants were asked how they might find this tool useful. A strong majority said they would use it as a planning and monitoring tool although two interviewees said it would not be beneficial to them as it was not telling them anything they did not already know, and that it was not useful in their situation. Thus it can be seen that the utility of these two models is not only applicable theoretically, they also have an implication for management practice which will now be discussed.

5.5 Implications for management practice

Small business owners have been underrepresented in the research about work-life balance and as a consequence assistance for them in managing the day-to-day challenges in the multiplicity of roles that they fill has been lacking. This research has sought to determine how and why work-life balance differs between franchised and

independent business owners and the findings of that research has demonstrated a few points of difference based on the business model. However it is apparent that owners face similar challenges regardless of the structure under which they operate. Thus this research has implications that relate to the management practice of two groups that is; the individual business owner and franchisors.

5.5.1 Implications for business owners

Small business owners have full responsibility for business outcomes whether they operate franchised or independent businesses. As a consequence of this they find it difficult to remove themselves from the daily operations unless they have adequate support to which they are able to divest responsibility. Furthermore some participants explained that being physically removed from the business did not provide them with an opportunity to relax as they would still be concerned about the operations and often felt it was preferable to be present at work. The added burden of the additional cost of employing replacement staff to replace the owner when absent was also cited as a limiting factor to having time away. A noteworthy finding of this research has been that if the owners can make decisions that then contributes to their sense of having balance. Thus this research has implications for management practice as the findings and subsequent model development can be applied in practice.

Heightening awareness about the concept of work-life balance can lead to people attempting to make some changes in the lives. Follow up interviews with 10 of the participants revealed that they had made changes to their role allocation since discussing work-life balance issues in their first interview. The most noteworthy change was with one interviewee who had changed his opinion that the business had “ruined” his life and he “hated it” and had now reassessed his preferences and come to a new position of planning to expand the business. When asked what had changed he explained that he had realised that he had to start living again, and not let work take a singular role in his life. He returned to his hobby of surfing and employed a manager so he could have some leisure time. He still works long hours but changed his attitude so that he controlled the business operations rather than letting the business control him. These changes had made him a better business owner and he was able to view the operations with a clearer perspective. This example reinforces the benefit of self-monitoring in management practice.

The subsequent interview with another interviewee was also revealing regarding the importance of self monitoring and self awareness. Prior to the interview the interviewee had attended a franchisor sponsored event where a speaker gave a presentation about work-life balance. He said *“it was the most boring presentation”*, and as he did not feel he had derived any benefit from it, it had been a waste of time and money. The researcher explained the approach she had taken to work-life balance and explained the role of control in assessing and maximising satisfaction in work-life balance management. As a result, this interviewee felt there was great benefit in empowering individuals to recognise that balance comes from allocating the structure of priorities, rather than just accommodating emerging contingencies. This further demonstrates the need to assist owners in self monitoring approaches to their working lives.

How to manage the multiplicity of demands is a challenge for small business owners and the Priority Management Tool facilitates this. This tool has implications for management practice as indicated by seven of the interviewees. The value of the PMT in management practice is that individuals are able to determine current allocations of job and personal roles and can compare the gap between actual and preferred commitments and allocations. Based on the priority given to each role, planning can then be undertaken to make changes if possible. One of the overriding considerations for role allocation for small business owners is the financial implication of the decision. Although the cost of change is too great for some, the dynamic tool can be used to plan for needed change. As one interviewee commented, prior to using the PMT, planning a weekend off it was too difficult to organise. Although it is possible to plan for this without the PMT, she felt its ease of use would encourage planning and reassure owners that there was potential for flexibility in their lives.

The research also has implications for management practice for the owners managing employees. Support networks have been shown to be essential in the maintenance of work-life balance and many respondents identified staff as a major source of this support. Problems tend to occur when current employees are unreliable or when owners are constantly required to source new staff. The findings about the challenges of managing different generations may be useful in establishing management practices that assist with the performance and retention of the younger employees.

Understanding the characteristics of Generation 'X' and 'Y' employees (Westerman and Yamamura, 2007) may provide owners with some insights into why these employees tend to be less committed and why strategies such as providing regular feedback, ongoing training and team meetings might benefit the business and assist with reducing staff turnover. Furthermore a strategy of employing more mature workers who are likely to be more stable and more committed to the work, could be worthwhile as it may reduce the cost of hiring new staff and assist owners in reducing employee absenteeism.

Therefore it can be concluded that the contributions to management practice for business owners centre upon heightened awareness of their own situations and of employing different strategies to make improvements in managing their work-life balance. The Priority Management Tool can be used as a personal management tool that allows users to plan and integrate all of the (often competing) demands of life, thereby assisting with on-going self-management. Another contribution of the research for management is in demonstrating to business owners how utilising available support networks to maximum benefit can assist in achieving better balance. Furthermore, the heightened awareness of the influence of effective support in facilitating a balanced approach to life assists the owners in recognising the importance of managing staff well, as they are one of the key providers of this support.

5.5.2 Implications for franchisors

This research has implications for franchisor management practice. The key area of difference identified between the independent and franchised businesses concerned the support available, with franchisees identifying staff, family and the franchisors as available sources of support. The franchisor support was embodied within systems, manuals and ongoing assistance. However, the research indicates that the ongoing support is, in most cases considered poorly designed, executed or not readily available and as Maritz and Neiman (2008) have indicated the franchisee/franchisor relationship will influence the effectiveness of the franchise system. Thus this research can provide insight for franchisors as they have an opportunity to reassess the type of support they provide to franchisees. They may design support initiatives to be relevant to the franchisees' prior levels of work experience as several of the participants entered into the coffee shop business had prior café or hospitality experience. The decision to choose

a franchise model was based on the desire to have access to the business skills the owners generally lacked, as opposed to the hospitality skills they often had from prior work experience. Generally the franchisor support focused on the hospitality skills and the support needs of the franchisees were unsatisfied.

Other concerns were that the owners did not receive continuing support. Either the franchisor had stopped providing support within a few months of signing the franchise agreement, or the support had stopped after a few days and there was no further contact for several months while the franchisee struggled to make the business work. Therefore, an opportunity exists for franchisors to ensure their internal systems are working so that there are well planned and executed support programs. These programs need to be predetermined and agreed to by both parties to ensuring clarity of understanding about the level, appropriateness and duration of the support provided. In addition, franchisees should seek better information when entering into franchise agreements regarding the intention of the franchisor with regard to support. Expectations need to be realistic and need to be based upon clear lines of communication prior to entering into the agreement.

Franchisors and franchisees would benefit from support systems that can be tailored to meet the emerging needs of the franchisees as their businesses develop (Young, Gilbert and McIntyre, 1996). This will provide both parties with the opportunity to continue to build relationships that are mutually beneficial as expectations are well managed. The franchisee receives appropriate support and the franchisor builds a successful franchisee network. The issue of unrealised expectations can have a detrimental impact on the franchisors reputation, as unsatisfied franchisees complain to prospective and other current franchisees (Frazer and Winzar, 2005).

In conclusion, franchisors have an opportunity to grow their franchise networks in the coffee shop sector if they can demonstrate they are able to provide a better lifestyle opportunity for the small business owners. Currently that opportunity is not being maximised as the support offered is not meeting franchisee expectations. Limitations associated with this research will be discussed in the following section (5.6).

5.6 *Limitations of the research*

The research has been conducted in one sector of small business which, although a relatively large sector in the Australian economy (ABS, 2006-07), is not representative of all small businesses. These organisations face certain limitations in time and place with the delivery of the product and service, hence the results of this research may not be generalisable to all small businesses. However, the findings may be relevant in many retail settings as there are similarities in the requirements faced by many businesses in terms of customer demand, lease requirements and franchise agreements.

The size of the sample used in qualitative research may also be a limitation. The research issues and research question were not suited to a positivist approach as the research was designed to be predominantly inductive theory building rather than deductive theory testing (Carson et al., 2001). In particular, qualitative research requires an in-depth inquiry into multi dimensional issues (Miles and Huberman, 1994; Cepeda and Martin, 2005) and as such a limited number of participants are included in the study. According to Perry (1998) 15 case studies with a range of 35 to 50 interviews provides adequate data except in the case of small business where “more than one interview “(pg. 794) is difficult to achieve. This research incorporated 30 interviews, as all cases were interviewed once and half were re-interviewed at a later stage. In addition 40 data sources including 20 questionnaires and 20 interviewer observations were used in the data collection process. Thus there was a total of 70 data sources for the complete project. Although the number of small businesses included is limited, the sample size is consistent with the requirements for this type of research.

In 2006 there were 960 business format franchise systems in Australia (Frazer et al., 2006) and this research included six different systems. Comments about the disparity between franchisee expectations and franchisor delivery in terms of support may not be applicable to all franchise systems in all industry sectors. Thus the ability to extrapolate the recommendations for franchisors to reevaluate the type and relevance of the support provided may be limited.

The study has been conducted in Queensland, a state in Australia so the relevance of the findings to the rest of Australia and internationally is another possible

limitation. Whether the challenges faced by the business owners in this research are similar to those in other locations is not determined in this research. However the inclusion of both urban and regional locations was a deliberate strategy to ensure locative diversity in this research.

The limitations outlined above facilitate a clearer understanding of opportunities for further research.

5.7 Recommendations for further research

The research was welcomed by many of the business owners as demonstrated by their willingness to participate in the process. During the interview process interviewees regularly expressed a desire to discuss their situations and often explained that there was limited opportunity to express concerns relating to their lifestyles, or the business challenges they faced. Hence an expansion of the current research into a greater selection of small businesses, including additional franchise systems, would add further depth to the research. Research would need to include other retail small businesses that are not involved in the hospitality industry, and should include businesses that have access to flexibility options such as knowledge workers who can conduct their business at different locations at different times. In addition it may be valuable to establish guidelines for small business owners to assist them in the attainment of a preferred lifestyle that incorporates the multiplicity of roles they wish to fulfill including that of worker. Additional data collected in other international settings may improve the generalisability of the findings. As Dant (2008) suggests much of the research into franchising has been conducted in single country locations, therefore it would be beneficial to investigate the impact of different cultures, employment laws and business requirements, on the opportunity for small business owners internationally.

Further research into the facets of lifestyle franchising is recommended as the findings reveal franchisees did not perceive that they are receiving adequate levels of support relative to the size of their royalty contributions. Hence research into how franchisors can design their systems so as to provide a lifestyle choice for potential franchisees is recommended. Furthermore it would be beneficial for franchisors to have

access to research on lifestyle franchising to inform their strategy for managing ongoing franchisor / franchisee relationships (Maritz and Nieman, 2008; Paswan and Young, 1999) as the continued improvement of these relationships can improve business outcomes for all participants. Further research into lifestyle franchising would be useful for individuals wanting to purchase a franchise, and if these issues are communicated to potential franchisees early in the recruitment process, this may go some way to minimizing future disputation due to perceived gaps between expected and actual work-life balance demands.

The challenge in conducting research into small business is increased due to the difficulties experienced in accessing the owners. However, small business owners represent a significant component of the Australian workforce (ABS 2006-07), and further research comparing the expectations and realisations of individuals embarking on small business ownership with a range of criteria such as lifestyle, financial reward, and management challenges, would be beneficial, as it will provide guidance for potential business owners, franchisors, educators and policy makers regarding the needs for education, information, and support mechanisms that will encourage and benefit these entrepreneurs.

Changing economic conditions could have an impact on both the business operations and some of the staffing issues raised in this research. Further research into the factors affecting work-life balance and how these might be affected by the recent changes in the domestic and global economies would be recommended.

5.8 Conclusion

This chapter has demonstrated the relevance of this research to work-life balance theory and practice. The findings have highlighted areas of similarity and areas of difference between previous organisational views on work-life balance and the current study. The research issues that emerged have been shown to be significant and have particularly filled gaps in the literature identified through a review of existing interdisciplinary research on this topic. Conclusions were drawn about the research question and discussion about the implications of this research for theory and

management practice was presented. The implications for theory are based on the development of two models that can be applied in a variety of settings but hold particular relevance for the groups studied. The implications for management practice are relevant for owners to self manage their work and the rest of their life commitments by providing guidance in managing employees, a significant factor impacting upon owners' lives.

Franchisors can also benefit from the implications for management practice in managing current franchisee relationships and for the improvement of management practice. Limitations to the research have been addressed and opportunities for further research have been detailed.

5.9 Summary

This research has contributed to the existing body of knowledge relating to work and life balance in small business including franchised businesses. Based on the current literature and the research that has been conducted two new models have been developed which promote an individual's understanding of their own situations as well as how to manage it for better outcomes. This research is the first empirical analysis conducted in Australia that compares the work-life balance of franchised and independent small business owners.

This research has made contributions in that it is one of the first to:

- Synthesise existing cross-discipline perspectives on work-life balance;
- Investigate work-life balance from a business owner's perspective;
- Compare work-life balance outcomes between independent and franchised small business owners;
- Use a qualitative methodology to explore and explain different ways of viewing work-life balance, such as considering the impact of personal control, rather than focusing on quantifying time spent on different tasks;
- Investigate the importance and role of control in managing work-life balance;

- Identify means for franchisors to improve the opportunities for their franchisees to have better lifestyles;
- Investigate how managing the intergenerational attitudes towards work may affect the business owner's ability to obtain work-life balance and provide recommendations for managing Generation 'X' and 'Y' employees;
- Develop an interactive analysing, planning and management model for use by individuals to facilitate improved work-life balance; and
- Introduce new parameters so that work-life balance is viewed as 'life', which includes a multiplicity of roles, the demands of which vary at different life stages. Therefore work-life balance is not an outcome rather it is a process.

In conclusion, this thorough and path-breaking research examining work-life balance found that this concept has different meanings for many different people. Generally, most individuals in small business reconcile competing work and life demands on an ad hoc basis. This research provides a framework to assist and empower individuals to take control of their own outcomes, whilst managing the multiplicity of roles that constitute life.

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APPENDIX 1

PERSONALLY ADMINISTERED QUESTIONNAIRE



Work/Life Balance Research Questionnaire

Name: _____ Date :_____

Interviewer's Name: _____

Name of Business: _____

a. Who owns this business and what type of structure is it (e.g. franchised or independently owned)?

b. Why did you decide to open your own business?

c. Is this the first business you have owned? Yes/No

d. If no what other types of businesses have you owned or what was your job?

e. Why did you decide to open a coffee shop?

f. Have you worked in coffee shops before? Yes/No

g. Why did you choose this business model?

h. How long have you had the business?

i. Did you start the business yourself or did you buy an established coffee shop?

- j. Why did you make the above choice?

- k. Do you have family members working in the business? Yes/No
 l. If yes which family members work in the business? _____

- m. Do you employ staff from outside the family? Yes/No
 n. If yes from where do you source staff? _____

- o. What are the hours of operation for the business?

- p. How many hours outside the hours of operation do you spend working in the business?

- q. Can you describe the work activities you undertake during a day?

- r. Can you list some of the non-work related activities that you need to attend to during a day?

- s. The longer you own the business is it easier or harder to manage and why?

- t. Do you think you understood the requirements of the business well before you started it? Yes/No
 u. If No what were the unexpected aspects that you have now discovered?

- v. Do you enjoy running the coffee shop? Yes/No

APPENDIX 2

INTERVIEW PROTOCOL

INTERVIEW PROTOCOL FOR WORK-LIFE BALANCE RESEARCH

Name of Interviewer:

Name of Interviewee:

Business Name:

Business Model:

Date of Interview:

- 1. This research is about work-life balance for small business owners and seeks to determine whether owning a small business provides the opportunity for WLB. Research has shown that many people enter into their own business because they are disgruntled with working in the corporate setting, they are unable to find a good balance between their work and life demands or else they simply want to be their own boss and take back control of their life. Can you explain why you went into your own business?**
- 2. Can we discuss how you felt about starting you own business?**
- 3. Have these feeling changed over time? How?**
- 4. What are the most rewarding aspects of owning your business?**
- 5. What are the things you find most challenging?**
- 6. You have chosen to start your business as a franchise/independently owned business. Can you explain why you made this choice?**
- 7. Can you explain whether you think choosing one or other business model might provide you with better work-life balance?**
- 8. Making the choice to open a franchise means making a choice to buy a proven business model. Do you believe this decision would improve the opportunity for WLB?**
- 9. How much would having an established reputation but also having to pay upfront fees and royalties impact on the business?**
- 10. How do you allocate you time between work and other 'life' activities?**
- 11. How do you feel about the way you are able to allocate your priorities?**
- 12. What do you think is essential with regard to support when running your own business?**
- 13. How do you feel about the support you have available to you? Do you think it enhances or limits your ability to have work-life balance?**
- 14. What are the established support networks you can rely on?**
- 15. Do you think men or women face the work-life balance challenge differently?**
- 16. Can you explain why you think that?**
- 17. In your opinion has your opportunity for work-life balance improved since owning a coffee shop?**
- 18. If yes why and if no why?**
- 19. How would you describe your level of satisfaction with your work/life balance?**
- 20. Do you consider structuring your work in such a way as to improve your work-life balance is important?**
- 21. How much autonomy do you think you have in making decisions about how you structure your work?**
- 22. What do you think are the main restrictions on allowing WLB?**
- 23. How do you feel about how you have to allocate your priorities and how do you think you could change things in your business to improve your work-life balance?**
- 24. Do you think the choice of franchised or independently owned business model has led to a better work-life balance?**

APPENDIX 3

INFORMATION SHEET



Comparative study of work-life balance between franchised and non-franchised business model

INFORMATION SHEET

Who is conducting the research

Student Researcher:

Robyn Young

Service Industry Research Centre

Griffith University

Telephone: 0415792895

Email: robyn.young@student.griffith.edu.au

Supervisor:

Professor Lorelle Frazer

Service Industry Research Centre

Griffith University

Telephone: 07 3382 1179

Email: l.frazer@griffith.edu.au

Why is the research being conducted

Interest in work-life balance has been growing over the years. Individuals sometimes decide to start their own business with the view to regain control over their lives. This research will investigate whether a franchised or non-franchised business model gives the owner greater opportunity for work-life balance. The project will be conducted by Robyn Young as part of her doctoral research studies at Griffith University.

What will you be asked to do

If you agree to participate in this research you will be asked to complete a questionnaire and then participate in an interview for up to an hour. The total time required will be no longer than one and a half hours. The interview will be audiotaped and erased once it has been transcribed. A follow up interview may be required which will be no longer than half an hour.

How participants will be selected for this research

Participants will be selected from owners of coffee shops that use either a franchised or non-franchised business format.

The expected benefits of the research

The aim of this research is to determine whether a franchised or independently owned non-franchised business will give future investors a better opportunity to have work-life balance. The research will determine whether the proven business formula gives a better opportunity to regain the control they seek.

Risk to you

There will be no risk to participants.

Your confidentiality

No participants will be named or able to be identified from the research findings. Any information that might identify participants will be disguised. Any information revealed in the questionnaire or during the interview will be confidential.

Your participation is voluntary

Your participation in this study is completely voluntary. You can decide even after the data has been collected that you would like it withheld or you can withdraw from the study.

Questions/further information

If you have any further questions or require further information please contact either Robyn Young or Professor Lorelle Frazer. Contact details are on the top of this form.

The ethical conduct of this research

Griffith University conducts research in accordance with the *National Statement on Ethical Conduct in Research Involving Humans*. If you have any concerns or complaints about the ethical conduct of the research project you should contact the Manager, Research Ethics on (07) 3875 5585 or research-ethics@griffith.edu.au

Feedback to you

All participants will be offered a summary of the findings of this research upon the completion of the project.

Privacy statement

The conduct of this research involves the collection, access and/or use of your identified personal information. The information collected is confidential and will not be disclosed to third parties without your consent, except to meet government, legal or other regulatory authority requirements. A de-identified copy of this data may be used for other research purposes. However, your anonymity will at all times be safeguarded. For further information consult the University's Privacy Plan at www.gu.edu.au/ua/aa/vc/pp or telephone (07) 3875 5585

APPENDIX 4

CONSENT FORM



Comparative study of work-life balance between franchised and independently owned non-franchised business models

WRITTEN CONSENT FORM

Student Researcher:

Robyn Young
Service Industry Research Centre
Griffith University
Telephone: 0415792895
Email: robyn.young@student.griffith.edu.au

Supervisor:

Professor Lorelle Frazer
Service Industry Research Centre
Griffith University
Telephone: 07 3382 1179
Email: l.frazer@griffith.edu.au

By signing below, I confirm that I have read and understood the information package and in particular I have noted that:

- I understand that my participation in this research will include the completion of a questionnaire and the participation in one interview of up to one and a half hours with the possibility of a follow up interview of half an hour;
- I have had any questions answered to my satisfaction;
- I understand the risks involved;
- I understand there will be no direct benefit to me from my participation in this research;
- I understand that I will not be identified in any publications arising out of this research;
- I understand my participation in this research is voluntary;
- I understand that if I have any additional questions I can contact the research team;
- I understand that I am free to withdraw at any time without comment or penalty;
- I understand that I can contact the Manager, Research Ethics, at Griffith University Human Research Ethics Committee on 3875 5585 (or researchethics@griffith.edu.au) if I have any concerns about the ethical conduct of the project; and
- I agree to participate in the project.

Participant _____

Date _____

Investigator _____

Date _____

Would you like to receive a summary of the results for this study? Yes or No

APPENDIX 5

QUANTITY / SATISFACTION MATRIX OF WORK

Quantity/satisfaction matrix of work

QUANTITY OF WORK	HIGH	Work Addict	Work Passion
	LOW	Underemployed	Self Selected Underemployed
		←	→
		LOW	HIGH
SATSFACTION WITH WORK			

Source: Developed for this research

Quantity/satisfaction matrix of work results of participants' feedback

QUANTITY OF WORK	HIGH	Fra10	Ind1, Fra8, Ind10, Fra9, Fra6, Ind8, Ind3, Fra4, Ind6
	LOW		
		←	→
		LOW	HIGH
SATSFACTION WITH WORK			

Source: Developed for this research

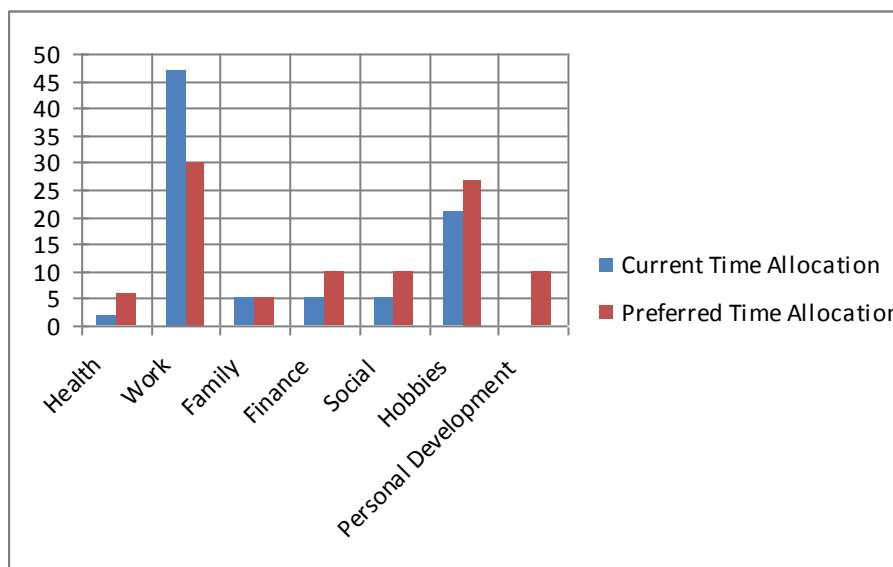
APPENDIX 6

YOUNG'S PRIORITY MANAGEMENT TOOL RESULTS

Appendix 6 Priority Management Tool F4 (1)

Priority	Category	Current Time Allocation	Preferred Time Allocation
2-Medium	Health	2	6
1-High	Work	47	30
3-Low	Family	5	5
1-High	Finance	5	10
2-Medium	Social	5	10
1-High	Hobbies	21	27
2-Medium	Personal Development	0	10
		85	98
		27	14

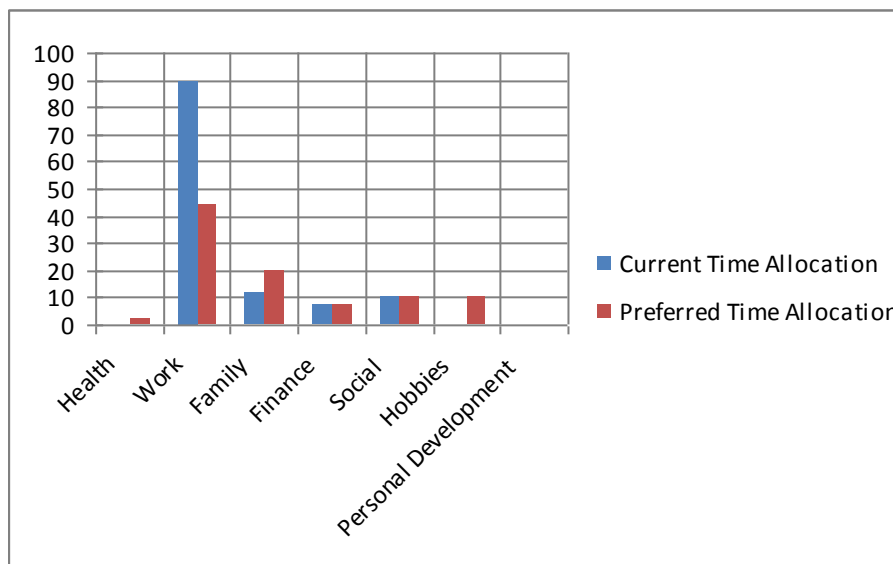
	Work	Life	Total
Mon	6	10	16
Tue	10	6	16
Wed	10	6	16
Thu	3	13	16
Fri	8	8	16
Sat	2	14	16
Sun	8	8	16
		47	65
			112



Appendix 6 Priority Management Tool F6 (1)

Priority	Category	Current Time Allocation	Preferred Time Allocation
1-High	Health	0	2
1-High	Work	90	44
1-High	Family	12	20
1-High	Finance	7	7
2-Medium	Social	10	10
3-Low	Hobbies	0	10
3-Low	Personal Development	0	0
		119	93
		16	42

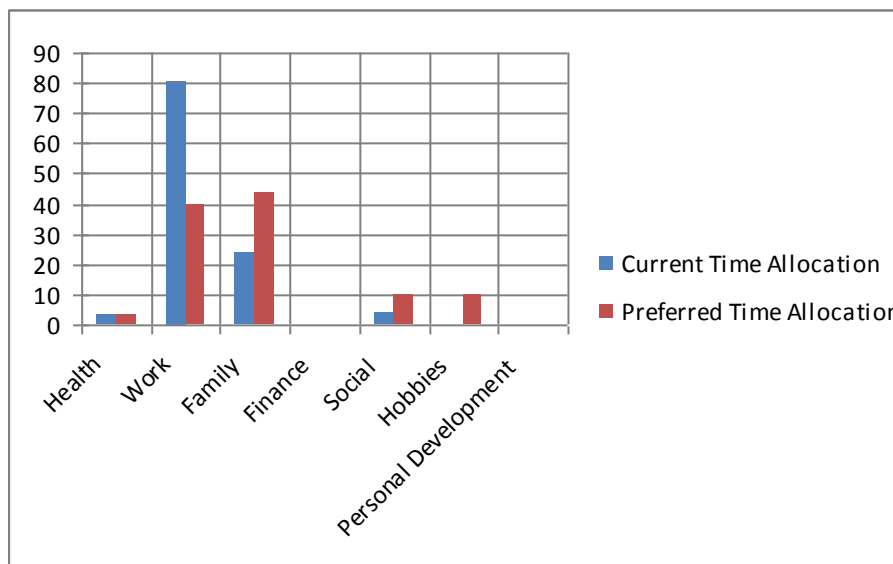
	Work	Life	Total
Mon	10	9	17
Tue	8	13	17
Wed	10	9	17
Thu	10	9	17
Fri	10	9	17
Sat	2	17	17
Sun	10	9	17
		60	75
			135



Appendix 6 Priority Management Tool F8 (1)

Priority	Category	Current Time Allocation	Preferred Time Allocation
1-High	Health	3	3
1-High	Work	81	40
1-High	Family	24	44
1-High	Finance	0	0
3-Low	Social	4	10
1-High	Hobbies	0	10
3-Low	Personal Development	0	0
		112	107
		11	16

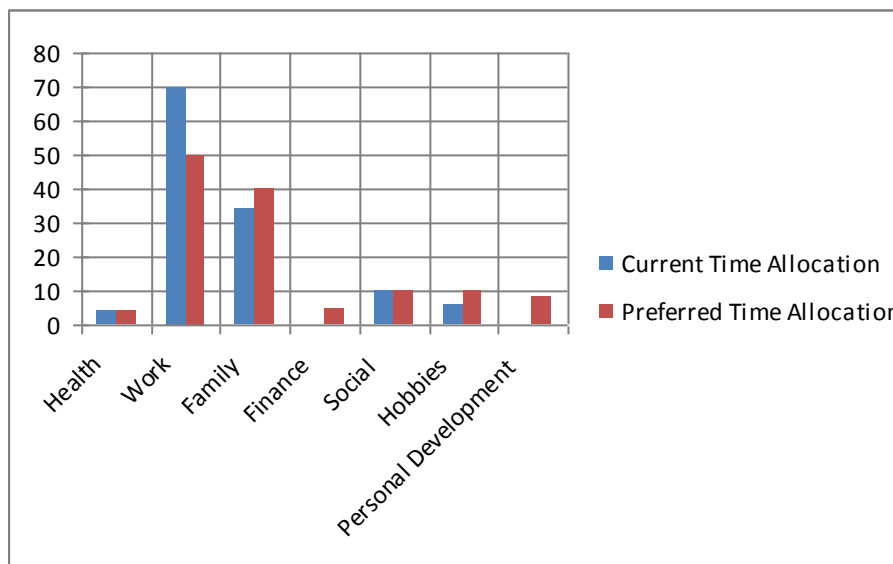
	Work	Life	Total
Mon	15	6	18
Tue	15	6	18
Wed	15	6	18
Thu	12	6	18
Fri	12	6	18
Sat	6	6	18
Sun	6	6	18
		81	42
			123



Appendix 6 Priority Management Tool F9 (1)

Priority	Category	Current Time Allocation	Preferred Time Allocation
1-High	Health	4	4
1-High	Work	70	50
1-High	Family	34	40
3-Low	Finance	0	5
2-Medium	Social	10	10
2-Medium	Hobbies	6	10
3-Low	Personal Development	0	8
		124	127
		1	-2

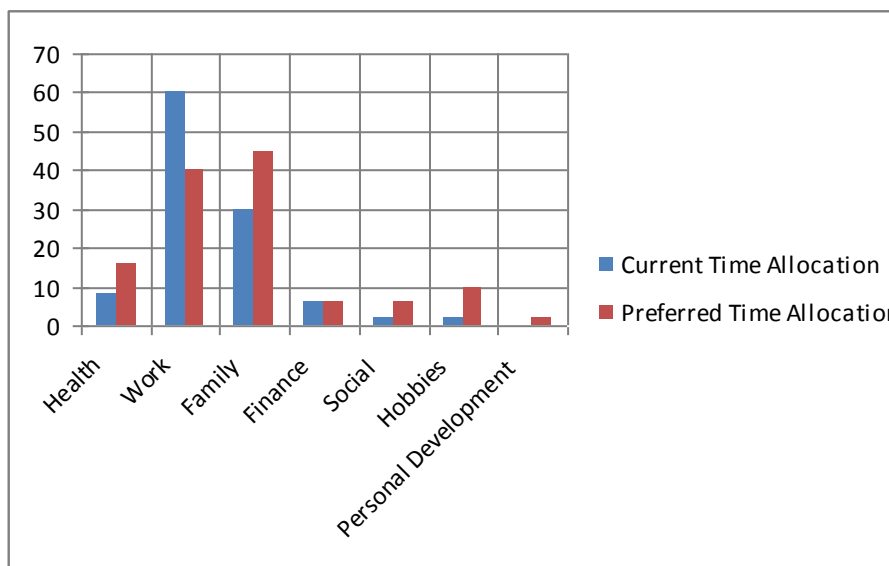
	Work	Life	Total
Mon		9	9
Tue		10	8
Wed		10	8
Thu		12	6
Fri		9	9
Sat		10	8
Sun			17
		60	65
			125



Appendix 6 Priority Management Tool F10 (1)

Priority	Category	Current Time Allocation	Preferred Time Allocation
1-High	Health	8	16
1-High	Work	60	40
1-High	Family	30	45
2-Medium	Finance	6	6
3-Low	Social	2	6
3-Low	Hobbies	2	10
3-Low	Personal Development	0	2
		108	125
		4	-13

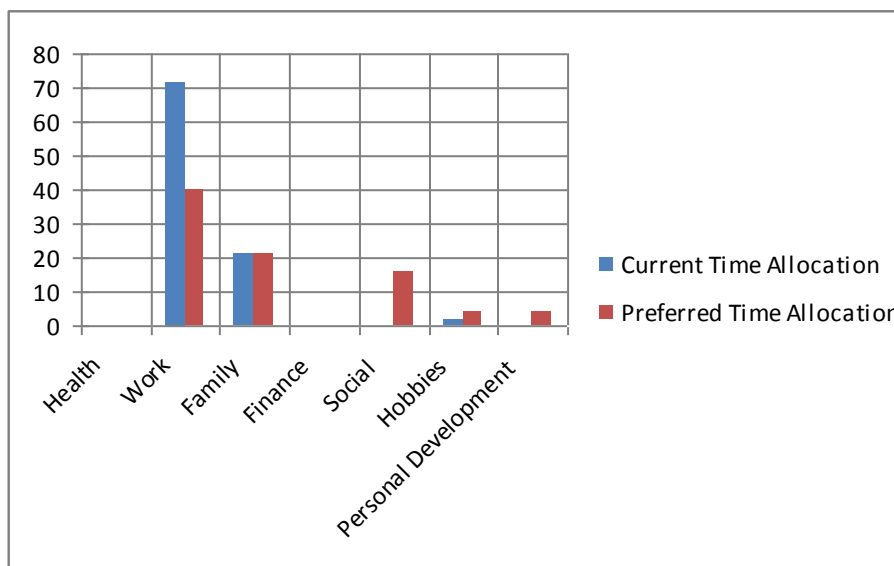
	Work	Life	Total
Mon	10	6	16
Tue	8	8	16
Wed	8	8	16
Thu	8	8	16
Fri	8	8	16
Sat	8	8	16
Sun	10	6	16
		60	52
			112



Appendix 6 Priority Management Tool IND1 (1)

Priority	Category	Current Time Allocation	Preferred Time Allocation
3-Low	Health	0	0
1-High	Work	72	40
1-High	Family	21	21
1-High	Finance	0	0
1-High	Social	0	16
3-Low	Hobbies	2	4
3-Low	Personal Development	0	4
		95	85
		26	36

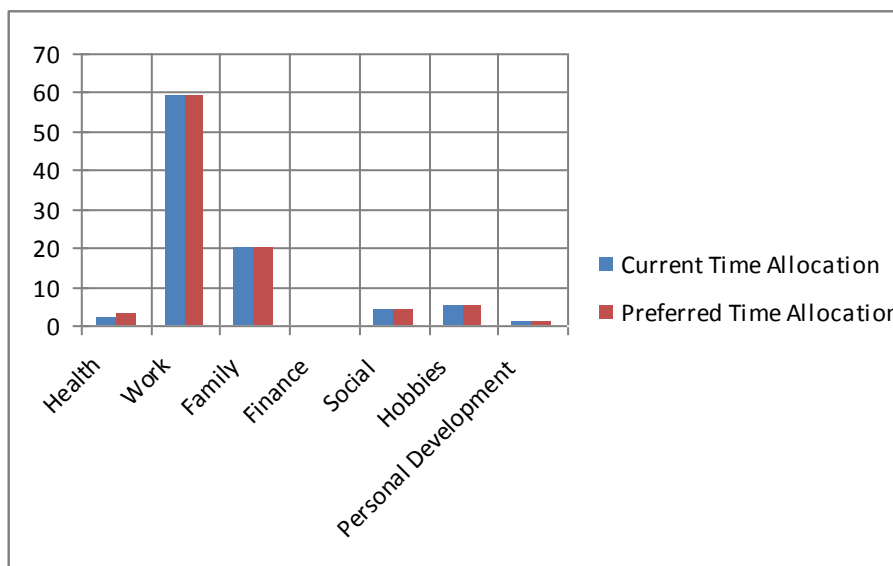
	Work	Life	Total
Mon	11	7	18
Tue	11	7	18
Wed	11	7	18
Thu	11	7	18
Fri	11	7	18
Sat	7	7	18
Sun	10	7	18
		72	49
		121	



Appendix 6 Priority Management Tool I3 (1)

Priority	Category	Current Time Allocation	Preferred Time Allocation
2- Medium	Health	2	3
1-High	Work	59	59
1-High	Family	20	20
2- Medium	Finance	0	0
3-Low	Social	4	4
2- Medium	Hobbies	5	5
1-High	Personal Development	1	1
		91	92
		10	9

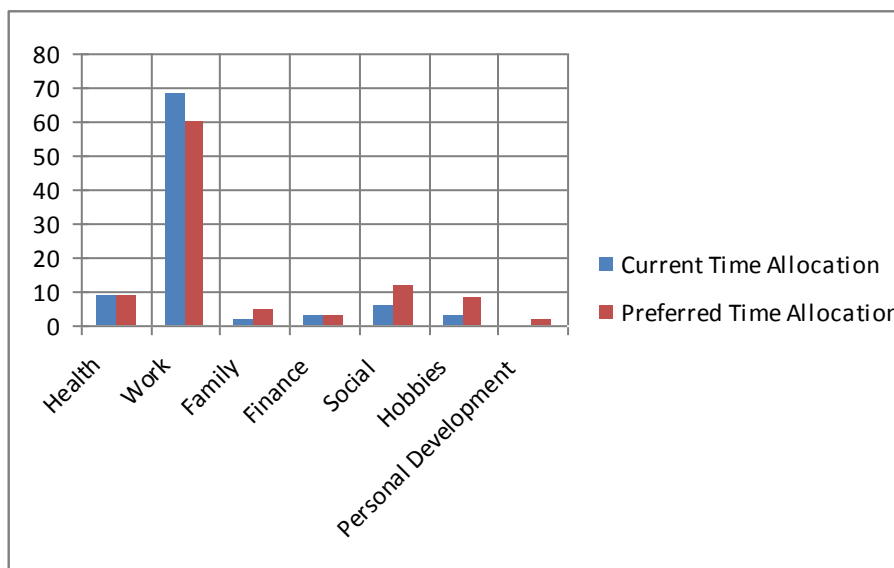
	Work	Life	Total
Mon	9	6	17
Tue	9	6	17
Wed	9	6	17
Thu	9	6	17
Fri	9	6	17
Sat	7	6	17
Sun	7	6	17
		59	42
		101	



Appendix 6 Priority Management Tool I6 (1)

Priority	Category	Current Time Allocation	Preferred Time Allocation
1-High	Health	9	9
1-High	Work	68	60
1-High	Family	2	5
1-High	Finance	3	3
1-High	Social	6	12
2-Medium	Hobbies	3	8
3-low	Personal Development	0	2
		91	99
		19	11

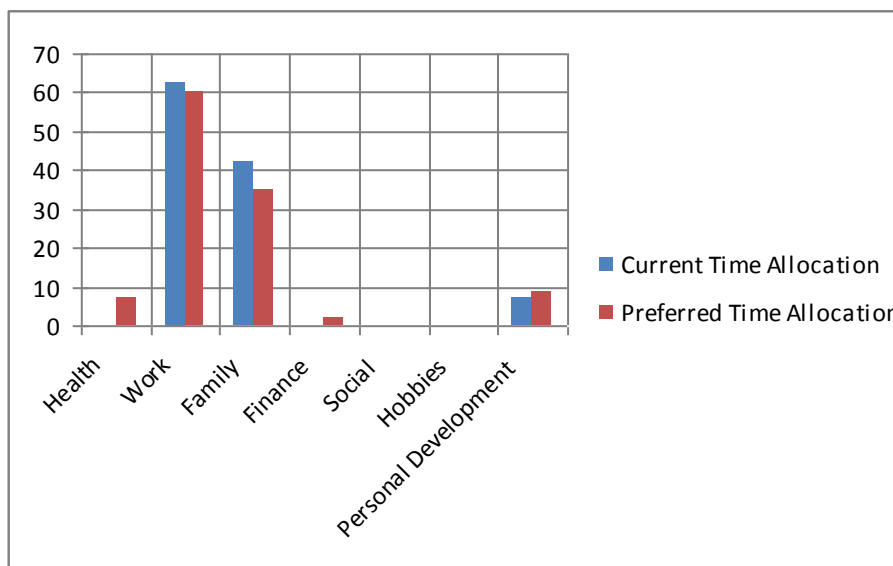
	Work	Life	Total
Mon	12	6	17
Tue	12	6	17
Wed	12	6	17
Thu	12	6	17
Fri	12	6	17
Sat	4	6	17
Sun	4	6	17
		68	42
		110	



Appendix 6 Priority Management Tool I8 (1)

Priority	Category	Current Time Allocation	Preferred Time Allocation
1-High	Health	0	7
1-High	Work	63	60
1-High	Family	42	35
3-Low	Finance	0	2
3-Low	Social	0	0
3-Low	Hobbies	0	0
1-High	Personal Development	7	9
		112	113
		-7	-8

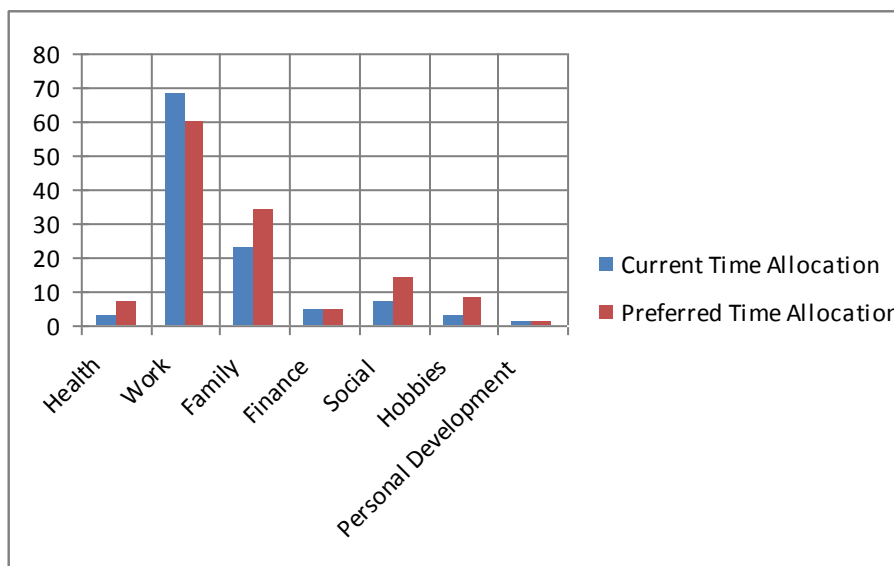
	Work	Life	Total
Mon	9	6	15
Tue	9	6	15
Wed	9	6	15
Thu	9	6	15
Fri	9	6	15
Sat	9	6	15
Sun	9	6	15
		63	42
			105



Appendix 6 Priority Management Tool IND10 (1)

Priority	Category	Current Time Allocation	Preferred Time Allocation
2-Medium	Health	3	7
1-High	Work	68	60
1-High	Family	23	34
1-High	Finance	5	5
2-Medium	Social	7	14
3-Low	Hobbies	3	8
3-Low	Personal Development	1	1
		110	129
		7	-12

	Work	Life	Total	
Mon		12	5	17
Tue		12	5	17
Wed		11	5	17
Thu		11	5	17
Fri		12	5	17
Sat		10	7	17
Sun			17	17
		68	49	117



APPENDIX 7

SAMPLE TRANSCRIPT OF INTERVIEW

Independent 6

This research is about work/life balance for small business owners and seeks to determine whether owning a small business provides the opportunity for work/life balance. Research has shown that many people enter into their own business because they are disgruntled with working in the corporate setting, they are unable to find a good balance between their work and life demands or they simply want to be their own boss and want to take back control of their life. Can you explain why you went into your own business?

It was an area that I had been interested for a number of years working in hospitality for over 15 years and a lot of that time in 5 star hotels and I always knew that I was able to run my own business and always wanted the control of being my own boss without having to report to senior management. Understanding that if anything occurs you're the one that is to blame at the end of the day and no one else. So they're the ultimate reasons why.

So when you talk about 5 star hotels that was kind of a corporate setting for you wasn't it?

Yes. I suppose they were major 5 star hotels like Sheraton, Stamford hotels etc etc. So very much corporate based very, the clients were very demanding obviously it was in relation to the dollars spending, they were bringing through the door at the end of the day.

Can we discuss how you felt about starting your own business? What were the main feelings you had?

Joy I suppose at the start. Happiness. The want to succeed and build a successful enterprise and a successful like in association with that enterprise. I suppose the vision at the start of branching out and say having multiple establishments over a lengthy period of time.

Is that the plan to continue to grow this business into other areas?

No.

That was, but you've changed your mind?

It was. It's come to the realisation now due to circumstances with my personal life that I cannot physically carry on with the business. It has become quite difficult and hence there has been a dramatic increase in hours and workload in association with the business. I still very much enjoy what I do but the physical strain is wearing.

So my next question was have these feelings changed over time and I guess how? So you're sort of saying it has become a little bit more physically wearing but are you still enjoying it?

I still enjoy it otherwise I wouldn't be here. I would have locked the doors many months ago. The demands are very high as there is no one you can turn to in order to assist us in a number of areas such as you know if equipment breaks down you have to get it repaired fairly well straight away otherwise it can impact on your revenue intake not only that day but over the next number of days in a major way. Staffing is a constant agenda. Staff come late for work, call in sick, leave etc etc so it's a constant ongoing cycle.

What are the most rewarding aspects then of owning your own business?

Getting to meet a broad spectrum of persons from all kinds of backgrounds. A lot of the local customers here that come here basically every day they are very very down to earth. Really nice people and it's the one thing that I really enjoy about it. Knowing that when I see them walk out with a smile on their face or even a new customer for that fact, I've made someone happy for the day and that's good.

What are the things you find the most challenging?

Staffing as previously mentioned. I suppose its just today's economic arena the unemployment level is quite low, people of I suppose my age bracket have a fairly positive work ethic. I suppose it's the association with the economic cycles at the time when you are growing up you put into work what you want to get out of work. Whereas I find the younger generation these days they don't have the want or the will to work for pay. At the end of the day they feel it is in their right to call in sick regularly and still be able to hold a job which is hard because knowing there are not the staff out there to bring on board you can't just constantly dismiss staff have a high turn around otherwise it impacts on your customer base as well because they know that there is something intrinsically wrong with the business if there is a high turn around of staff. So that's a hard challenge. Suppliers as well. Ensuring

that they deliver products on time, correctly invoiced. Some suppliers are very good, some we've found to be fairly hopeless I suppose you could say. Not understanding we are their customer and they are our customer as well and at the end of the day if you walk to another supplier you hope to get better service but sometimes its not always the case.

So you've chosen to start this business as an independently owned business, can you explain why you made that choice?

I looked into franchises but I suppose the cost association with purchasing a franchise is quite high to start with obviously they show reasons why there is brand recognition, marketing support advertising support behind that depending on the franchise you buy you also have to pay franchise fees or royalties in a sense to the master franchise company which comes off the bottom line. I suppose the reason I went independent or an independently established business was freedom from all of those reigns so that you had control over everything all aspects. In some ways it is harder because you don't have those backup tools behind you but in the other side of the fence its an excellent opportunity to work in areas you haven't necessarily worked in before such as marketing, advertising, liaising with newspapers or magazines, graphic designers etc getting a product you want and what you know is right for your business rather than having something spoon fed to you.

So you enjoyed that. Can you tell me whether you think having a business model of an independent model versus a franchise one would give you a better opportunity for work/life balance?

Good question. I suppose a lot of it depends on a variety of factors like location, obviously for one. That impacts on the hours of what the operation is whether it is 5 day or 7 day operation. All seasonally based. If you're your own independent business you have the choice as to when you open and close there is no strings attached there. Whereas if you are part of a franchise operation then there would be ultimately some direction of when you operate the business. When you open and when you close how many staff you have to have on board at certain times. How much you have to pay people, uniform requirements etc. As far as independently was my choice because of those reasons.

How much do you think having the established reputation is worth paying for those royalties and up front fees? Like to say if you buy a franchise business do you think that's worth it or?

Depends on the company. Some companies some franchise have a stronger brand recognition than others. I know for example Coffee Club has a very good brand recognition people like the product where as Gloria Jeans for example some people yes it's a good product or good brand but people don't like the coffee they serve. Things like that.

So all the Gloria Jeans people sink by that coffee choice.

Yes. Sorry I've lost

We were just talking about whether you think that paying for the upfront fees is worth the brand name.

There is an instant cash flow there associated with it as well I suppose like people know that yes I can go to this certain establishment and get everything is to a standard product. Where as if you are independent then standards can fluctuate. There are no mystery shoppers involved etc where as I suppose with franchise there would be mystery shoppers to control the quality of product. I suppose back to the price you are getting a lot of support in the background that's why you ultimately pay a higher price so it does make it easier in those areas. Definitely but it makes it harder in other areas as well.

How do you allocate your time between work activities and other life activities?

It's very hard at the moment. I basically get up at 5 every morning and I get home at 4.30 in the afternoon and then there's all the book work at the end of the day which takes anywhere from 2 – 4 hours depending on the day of the week and a lot of that has to be done instantaneously otherwise I suppose you start to slow down. So there's not a lot of time out of work for social activities. And if there is to be any social activity it has to be planned ahead so you can look at what invoicing you have to pay or meet by certain deadlines so that it can be made on time so that you know yes Friday week im not doing anything that week except the cash reconciliation at the end of the day. So you know you have a clear night ahead. Taking physical days off is quite hard due to business levels it can be any day of the week and it can be you just don't know how busy it's going to be there's no crystal balls to look into, no maths behind it. I have persons in place to look after the establishment if Im not here but there is always in the back of your mind things to occur, customers get affected and ultimately turnover gets affected by negative service when you're not around your issue that occur so there's not a lot of time.

So work is the number one priority?

Work is the number one priority at the moment purely for the fact that it's the only source of income but it has a big effect on your life.

How do you feel about the way you have to allocate work as your number one priority and there's no time for anything else?

In all honesty I hate it. It ruined my marriage and there's no time for anything else. I'm now at that stage of putting together information for brokers who list the business. It's something that I don't want to do but I have to do in order to regain control of my life. To get back on track.

Well the good news is there is lots of jobs in hospitality so you could sell this and move on quite successfully don't you think?

With my working background I feel it would be quite easy to obtain a fairly good position within any organisation in hospitality but then again it's probably now an area or a field that I would like to get out of. It's a very dog eat dog industry. People expect blood out of stone. The pay is, I've worked in corporate areas of hospitality and the pay association with what you do is not there as compared to other industries. People expect a lot from service. Like for example customers come in and they expect a very high level of service but they don't want to pay for it. Where as you go to an accountant you'd expect a certain level of service but you pay for it.

Or a plumber or electrician.

Well that's the same thing. They're physically qualified, they have a trade and they can charge such. To run your own business there's no necessary qualifications as such you have to obtain but you have to have a very sound knowledge of all areas; human resource, engineering, accounting, financial control, product negotiation, everything and there's no set limit as to what you can be reimbursed for that. It's hard.

So what do you think is essential with regard to support in running your own business? You mentioned having to get things repaired and having to do all the books and everything. Do you think you need other support around you?

You need people you can talk to in relation to all areas of business that have a common understanding, so fellow business owners; they obviously know people who know people. They might know an electrician who is really good. Does a really good job at a reasonable rate for example. So its things like that that are great can help out.

What about small business associations and things like that and family other family, do you have any of them that support you?

Family are a very big support knowing that you can talk to them about anything. Any issues that you might have. But unless they have an understanding of what it's like to run a business then there is a lot they won't understand as well. They can give you support emotionally but as far as the actual physical runnings of it they may not be a lot of support there. Small business associations I suppose there are some around but they don't really do a lot for you the business owners. They can have a pool of resources that you can go to but you still have to physically go there and find it. There is no one that can physically come out to you and say you know what do you need? How are you going with everything? It's hard in that sense.

So how do you feel about the amount of support you've got? Do you feel its sufficient or its not?

When I was with my wife it was great because there was support there which is something I suppose is more in relation to the previous question you need someone you can talk to about anything in relation to the business that understands that you've had a bad day etc. You need people to be able to talk to about everything in relation to the business there are something's you cant talk to your employees about because ultimately it effects their work experience I suppose you could say.

At the moment you'd feel like you don't sufficient support networks now that you don't have your partner at home.

Not to the degree that I would like. Family is there but they don't live in the local area so its hard in that sense and because there is so much now impacted on yourself whenever people do come to stay you feel it's a hindrance on your ability to achieve work targets such as invoicing, billing etc etc because its such a time consuming task.

Do you think men or women face the work/life balance differently?

Definitely. I suppose just through experience that I've been through recently women are able to they have a different approach to dealing with situations. With men everything has to be done straight away. I suppose anger or frustration comes out quite easily as its part of the human nature. Where as with women things are a bit more logical and planned. Not that men can't plan. But there is definitely a difference there.

In your opinion has your opportunity for work/life balance improved since owning the coffee shop?

No. It has probably deteriorated nearly to the point of physical burn out working 7 days a week even though I've bought people in who are assistant managers they have become quite a non reliance due to the effects on their personal life. So days where you were planning to take off they now either don't show up so you know it's an absolute nightmare.

So on a satisfaction scale of 1 – 10 where would you say you are on your satisfaction with your work/life balance?

If 1 was the lowest and 10 was the highest, so if 1 was having no satisfaction I'd be a 1.

That's fairly significant. So would you consider restructuring you work in such a way as to improve your work/life balance?

I have considered that, you know closing the operation for 1 or 2 days a week perhaps say on Monday but the obviously you loose revenue and you still have your financial obligations of paying rent, paying bills etc but the obviously you don't have other needs to meet like employee wages. So some areas decrease and some areas become harder to meet. Obviously some customers will get frustrated because of that as well and they might look

elsewhere for their long term needs like those persons who come here every day obviously they've been coming here for 10 years they would get put off by that and obviously walk straight across the road to another business. It has been considered but the impact on all obligations have negated that.

So the intense competition in the area and the fact that you've got ongoing customers probably restricts your opportunity for allowing you to have some work/life balance. I know this just completely out of left field but have you thought about taking in a partner?

It has been considered but I've spoken to a lot of people in relation to business partnerships and you have to be very careful who you go in partnership with because you don't know a lot about them. Its walking through a minefield, trust factor, as you know this is a very much a high cash business money is very easily to go missing as such and I've heard a few horror stories about that in the past from previous persons. I suppose in relation to the previous question as well I did at one stage change the hours of operation from 7 o'clock to 3.30. We were opening from 6.30 till 4 o'clock in the afternoon and I found that there's no one around in the street after 3.30 and there was no one around quite early at the time of the year so I changed the hours of operation which only lasted for a couple of weeks as I still would get to work and find people knocking on the door saying "why aren't you open" and Id say well look at the sign. It's because they've been so inherent in being able to come here at a certain time and get something, it didn't change.

So how much autonomy do you think you have in making decisions about the work? Are you completely autonomous?

Oh completely. Every action feeling emotion that goes with the business is what I put into it.

It's all yours

Yes. Everything that I do is affected by me. There is no one else to blame if anything goes wrong. Obviously something's don't go right with customer service that's out of my control its due to various other factors but the big picture things they're all under my control.

So let's just summarise by saying, well how would you summarise your work/life balance and your level of satisfaction and with running a coffee shop.

The work/life balance at the moment is not there it is all just work. There is no personal life it might be half an hour to an hour a night and that's basically to eat dinner and watch half an hour of TV or something. There's not a lot of out of work activity. When I came into it I had expectations of having staff in place that could alleviate that remedy which worked for a while but then it's been a bit of a rock road as well. Other areas as previously mentioned, partnership failing etc, have greatly affected the work/life balance. There seems to be more out of work activity when I was with my wife but not that she's gone it has turned the way. Reasons I don't know. You find ways to make time for your partner.

So your level of satisfaction is low?

Yes the level of satisfaction at the moment is low. I truly don't know what goes through the kids heads these days in relation to work as every day I say to myself I can do this I can make this successful, I know its successful but then you get to work and you get your staff calling in at 6.45 and they're suppose to be starting at 7 and your next staff member isn't in at 8 you know your going to get an absolute flogging from your customers because its busy and they just don't care. And they know that they will still have that job at the end of the day because the job market is too tight. You can pay people more to keep people but you don't necessarily get the quality of work out of them still. They just think I'm getting paid more I'll stay here and I won't improve in any way. You can give them intrinsic bonuses or incentives but it still doesn't bring any great loyalty to the business as such. So I mean larger organisations it's easier because they have a larger revenue intake so they can be a bit more adlib in what they give to their staff but in smaller businesses every dollar counts. Staff drop a plate and they go oops and smile about it but at the end of the day I've got to find another \$10 to replace that plate. That's the hard part about it there is no care factor there.

Not happy.

No.