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## Mixed methodology in family business research: Past accomplishments and perspectives for the future

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### ABSTRACT

Family business researchers face several challenges due to the complex nature of the field theoretically and empirically. Mixed methods are well suited to answer *why* questions and often provide insight into the mechanisms and boundaries of complex phenomena. We find that utilizing mixed-methodological approaches therefore offers a valuable way for the field to manage the complexity of the family business domain while generating generalizable theoretical insights. We assess the current state of mixed methods in family business research and provide guidelines for conducting rigorous research. Our review comprises 32 publications on family firms that implemented qualitative and quantitative data from 2000 to 2015. Finally we offer a checklist specific to the family business field for authors to use when conducting mixed methods studies.

### 1. Introduction

Although there have been many advances in the family business field in terms of the number of conferences and journals dedicated to the field and the impact family business research has on the broader academic community (Evert, Martin, McLeod, & Payne, 2015; Sharma, Chrisman, & Gersick, 2012; Stewart & Miner, 2011; Wilson et al., 2014), researchers still face several challenges due to the inherently complex nature of family firms (Wilson et al., 2014). These complexities stem from high levels of interpersonal dynamics that are embedded in the family supra-system (Whiteside & Brown, 1991) in addition to the pursuit of creating nonfinancial value (Astrachan & Jaskiewicz, 2008; Berrone, Cruz, & Gomez-Mejia, 2012; Zellweger & Astrachan, 2008) not typically found in nonfamily businesses (Astrachan, Klein, & Smyrnios, 2002). In addition to these theoretical complexities, family business researchers face challenges related to data collection and the availability of specific data sets (as opposed to convenience samples; Wilson et al., 2014). Often family business researchers are expected to employ greater rigor to ensure uniform application of methods (Zahra & Sharma, 2004) in the hopes that they may develop new theoretical perspectives and advance the field (Hoskisson, Hitt, Wan, & Yiu, 1999; Scandura & Williams, 2000).

One research methodology which helps solve these complexities is mixed methods research. Mixed methods research utilizes both qualitative and quantitative perspectives in the same study to provide additional understanding and generalizability for the topic under study.

This is especially important in family business where it is often useful to identify results that may be idiosyncratic to a specific study or business type, and those which may generate theory for the overall discipline. Mixed methods research is also useful for answering *why* questions in research contexts (Creswell, 2014), and this type of research question can be especially useful to family business researchers as the focus of investigation often is not just on *what* happened in the family business, but *why* the family and business acted in particular ways. Furthermore, mixed method research offers the capability to make generalizable observations that usually come from quantitative approaches and combines it with rich and “thick” descriptions that typically come from qualitative techniques. This combination can help uncover previously unobserved relationships and generate interesting new insights to advance theory development (Aguinis & Molina-Azorin, 2015; Salvato & Aldrich, 2012).

When we look at how mixed methods can help to explore unique contexts and provide generalizability, this fits well with family business research, given the systems relationship between the family, the business, its owners, managers, and other parties involved (Pieper & Klein, 2007; Tagiuri & Davis, 1996). Because of these relationships there is a significant amount of variation among family firms (Dyer & Handler, 1994), resulting in considerable heterogeneity (Chua, Chrisman, Steier, & Rau, 2012) that research needs to account for. For example, if a researcher found a quantitative relationship while investigating a family business research question, a follow-up qualitative study could be used to understand the mechanisms of that relationship, as well as

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any components unique to the family business domain (e.g., interpersonal family dynamics). This combination of generalizable results and in-depth understanding is especially valuable for growing research areas such as family business as they seek to identify where existing theoretical perspectives overlap and diverge because of the family-business relationship (Reay & Whetten, 2011).

To further understand mixed methods research and its current use in and value to the family business literature, we present a brief overview of mixed methods research, including its definition, basic design strategies, and suggestions for conducting rigorous research. Following this overview, we present the current state of mixed methods research being conducted in family research through a systematic review of the recent literature. In doing so, we highlight exemplar works in family business research to help further clarify the mixed methods rigor framework as it can be applied to family business research. Finally, we offer a framework and checklist for family business researchers on key elements to address when thinking about using a mixed methodological design. This checklist is built on our current assessment of what is being done in the field as well as extant guidelines for conducting mixed methodology in other domains and getting that research published in top-tier journals. This assessment of the field and framework for how to conduct mixed methods research are timely and offer a significant contribution to methodological conversations in family business.

## 2. An overview of mixed methodology

While combining qualitative and quantitative research is not new (Greene, 2006; Pluye, Gagnon, Griffiths, & Johnson-Lafleur, 2009), the definition of this practice as its own methodological perspective is a more recent occurrence for business researchers (Tashakkori & Teddlie, 2003). Now formally known as mixed methods research, this methodology is beginning to be discussed in multiple literatures. In the marketing literature, several studies on current mixed methods practices and perspectives have been published in the last five years (Harrison & Reilly, 2011; Harrison, 2013; Johnson, 2015). In strategy, a recent literature review (Molina-Azorin, 2012) shows that mixed method research is more impactful (in terms of citations) than mono-method studies, underlining the significant potential of the technique. Likewise, the management literature is moving to formally recognize

this discussion with a recent special issue in *Organizational Research Methods* that focused solely on mixed methods.

### 2.1. Definition

Mixed methods research requires the formal combination of qualitative and quantitative data collection and analysis (Creswell, 2014). For this research article, we use the following definition put forward by Johnson, Onwuegbuzie, and Turner (2007, p. 123):

Mixed methods research is the type of research in which a researcher or team of researchers combines elements of qualitative and quantitative research approaches (e.g., use of qualitative and quantitative viewpoints, data collection, analysis, inference techniques) for the broad purpose of breadth and depth of understanding and corroboration.

Essential to this research approach is the perspective that the combination of generalizable quantitative statistical trends and the depth of understanding available to qualitative research techniques creates a stronger research tool than a single data type can by itself (Bryman, 2006; Greene, Caracelli, & Graham, 1989). Mixed methods are especially useful when a single data type does not allow the researcher to fully understand the research problem under investigation. For example, Edmondson (1996) in her seminal work utilized both an individual and a systems level analysis to understand how organizations can detect and correct errors. In family business, a researcher might follow up a quantitative data collection on organizational culture in a family business with qualitative interviews with family and nonfamily members to gain deeper insights into the nuances of the culture and the influence of the family itself. Multiple research questions might be asked here, including “To what extent do the qualitative results match the quantitative results?”, “To what extent do the qualitative results explain the quantitative results?”, and “Do family perceptions of the quantitative results differ from those of nonfamily members?”

### 2.2. Current practice

The use of mixed methods research has existed, at least informally, for many years in multiple business literatures. These studies are often

**Table 1**  
Rationale for Mixed Methods Research.

Rationale	Descriptions
Triangulation	Quantitative and qualitative combined to triangulate findings to be mutually corroborated
Offset	Combining strands offsets their weaknesses to draw on the strengths of both
Different research questions	Quantitative and qualitative each answer different questions
Diversity of view	Combining researchers' and participants' perspectives through quantitative and qualitative research, respectively, and uncovering relationships between variables through quantitative research while also revealing meanings among research participants through qualitative research
Explanation	One is used to help explain findings generated by the other
Illustration	Qualitative to illustrate quantitative findings (putting “meat on the bones” of “dry” quantitative findings)
Unexpected results	When one strand generates surprising results that can be understood by employing the other
Instrument development	Qualitative is employed to develop questionnaire and scale items
Confirm and discover	This entails using qualitative data to generate hypotheses and using quantitative research to test them within a single project
Process	Quantitative provides an account of structures in social life but qualitative provides a sense of process
Sampling	One approach is used to facilitate the sampling of respondents or cases
Context	Qualitative providing contextual understanding coupled with either generalizable, externally valid findings or broad relationships among variables uncovered through a survey
Completeness	Bringing together a more comprehensive account if quantitative and qualitative research is employed
Credibility	Employing both approaches enhances the integrity of findings
Utility	Among articles with an applied focus, combining the two approaches is more useful to practitioners and others

Note: Adapted from Harrison and Reilly (2011).

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