Mixed and Merged Methods
Toward a Methodological Pluralism

Professor Dr. Giampietro Gobo, Department of Social and Political Studies, University of Milan, Italy

Course dates: 30 July - 3 August 2018

Main disciplines: Methodology, Sociology, Political Science, Psychology, Economics, Geography

Course Credits: 10 pts (ECTS)

Course objectives / learning outcome

From the 1990s, mixed methods – the integration of “qualitative and quantitative approaches or methods in a single study or a program of inquiry” (Tashakkori and Creswell 2007: 4) – are an important aspect of contemporary social research.

However, their presence is not new in the methodological landscape. Historically, mixed methods were a common practice for almost one century, since the making of social research until the late 1930s. Examples are: the seminal work of the French Frédéric Le Play in the late 1840s; the inquiries directed by the Englishmen Charles Booth in 1886 and B. Seebohm Rowntree in 1899; the golden age of the Chicago School in the 1920s; the studies conducted by the Austrian P.F. Lazarsfeld from the 1930s; the work of the American Rensis Likert in the same period, and so on.

Therefore, the current trend of mixed methods did not emerge unexpectedly, but it is rooted in important experiences and practices of the past, without which the philosophy and epistemological foundations of contemporary mixed methods research cannot be fully understood.
After a historically introduction on the making of mixed methods and their renaissance in the 1990s, the course will give an overview about current debates and the most important issues in the field.

The course will first propose an alternative classification (of the main methodologies currently used in social sciences), aiming to overcome the outdated dichotomy qualitative-quantitative. Then, the (apparently obsolete) language of social research (shaped by terms such as 'measurement', 'concepts', 'hypothesis', indicators’, ‘variable’, ‘sampling’, ‘generalization’ and so on) will be revisited in the light of a new epistemological framework; that will serve as a basis for re-joining qualitative and quantitative approaches on a new methodological ground, which was called by someone “third paradigm” (Tashakkori and Teddlie 1998, Greene and Caracelli 2003, Morgan 2007, Creswell and Plano Clark 2011).

As a result, course participants will acquire skills and competencies in order to design a mixed methods study and develop an appropriate strategy to answer specific research questions. In this regard, some little-known techniques (“inter-vey”, calendar interviewing, Delphi method, mystery shopper), classified as “merged methods” (Gobo 2015), will be showed. They are particularly interesting because could represent an overshooting of the qualitative and quantitative divide, by the fact they embody in one single method the advantages of either approaches or methods (Gobo 2016).

Finally, it will be argued how mixed methods are useful for decolonizing contemporary methodology and why they are particularly suitable for studying multicultural societies.

During the course, participants (if they wish) will have the chance to share own ideas and plans regarding a mixed methods design (e.g. a PhD project, a fieldwork problem and so on) and receive comments, suggestions and advices emerging from the collective debate.
Research designs/assignments

Students have two options in terms of submitting a research design/paper in order to receive ECTS credits:

1. In particular, students have the option of presenting a 2,500 word research project in the concluding Friday session of the course week for constructive critiques by course participants as well as the lecturer. Presumably, students will choose to present the research design for their PhD thesis, though students could also present a research design for a separate project, article, or edited volume. Research designs should be crafted according to the guidelines offered, in advance and in a separate e-mail sent to you, by the lecturer/summer school administration.

2. It is also possible to earn a course certificate together with 10 ECTS credits points for a PhD program by submitting a short essay (3,000 – 4,000 words) within two months after the course.

Specific requirements

Since the focus of the course is not on qualitative and quantitative methods itself (although short summarizing overviews about essentials of qualitative and quantitative methodology and methods will be given) it is expected that course participants have at least basic knowledge about qualitative and quantitative research methods.
Lecture 1 (part A): Mixed methods: a historical view

Current mixed methods did not emerge unexpectedly in the late 1980s. They have their roots in several “ancestral” tradition and practices: the European making of social surveys, the Chicago School heritage, and the legacy of Weber, Lazarsfeld and Likert. Recovering these experiences, enable us to better understand the philosophy and epistemological foundations of contemporary mixed methods research. In addition an historical viewpoint immunizes us against the ingenuousness (increasingly commonplace among contemporary social scientists) of presenting as novel theories and methods which were proposed seventy or eighty years ago. Knowledge of history saves us from having constantly to reinvent the wheel...

Readings:

Lecture 1 (part B): An alternative classification of research methods: overcoming the dichotomy qualitative-quantitative

The most common classification of current research methods is the dichotomy qualitative-quantitative. However, besides being outdated, it does not reflect the plurality and complexity of the contemporary research practices. In order to improve the understanding of such complexity, the first lecture will discuss three important issues: 1) what is a classification, 2) what is a methodology, and 3) what is a method. The answer to these three questions will lead us to formulate a new classification proposal, which assumes sixth main methodologies in social sciences.

Readings:

- Bryman, A. (2008a), 'Of methods and methodology', in Qualitative Research in Organizations and Management, 3, 2: 159-68
- Marradi, Alberto (1990), Classification, Typology, Taxonomy, in Quality and Quantity", XXIV, 2: 129-57.

Lecture 2: Revitalizing the (apparently obsolete) traditional language of social research

Terms such as 'measurement', 'concepts', 'hypothesis', 'indicators', 'model', 'variable', 'sampling', 'generalization' seem old-fashioned. However, they are, unaware and tacitly, performed by social scientists in every single research act; because they are properties of both common—sense and scientist reasoning. Hence, what we need is not to abandon them but to revitalize within a new agenda. Whereby they will be shortly revisited in the light of a new epistemological framework, which will serve firstly to understand that measuring, counting, scaling and classifying are four different ways of assembling data; secondly as a basis for re-joining qualitative and quantitative approaches on a new methodological ground.

Readings:

Lecture 3 (part A): **What are mixed methods?**

Many definitions of mixed methods are available in the literature (e.g. see Johnson, Onwuegbuzie and Turner, 2007). Sometimes they are in competition; also, there are doubts about their substance. Whether Morgan (2007) sees mixed methods as a ‘third paradigm’, with the potential to open a new era in social sciences, others suggest to discard the term ‘methods’ because it conveys the idea that qualitative and quantitative methods are independent and in some ways mutually exclusive. For this reason, they prefer to speak of ‘mixed approaches’ (Johnson and Christensen 2010), ‘mixed research’ (Onwuegbuzie 2007) or ‘mixed methodology’ (Tashakkori and Teddlie 1998). The lecture will try to unravel this skin.

**Readings:**


**Lecture 3 (part B): Debates and controversies**

The final part of the lecture focuses on the main controversies: should we talk about mixed methods or mixed strategies? About integration or complementarity? Do mixed methods really collect better data and improve theory? Participants will end up getting their own opinion, which will guide their future research.

**Readings:**

- Bazeley, Pat (2016), Mixed or merged? Integration as the real challenge for mixed methods, in *Qualitative Research in Organizations and Management: An International Journal*, 11(3): 189-194
- Flick, Uwe (2016), Mantras and Myths: The Disenchantment of Mixed-Methods Research and Revisiting Triangulation as a Perspective, in *Qualitative Inquiry*, 23(1): 1 –12


Lecture 4: **Merged methods I: two techniques** (“inter-vey” and the “calendar interviewing”)

The future step in mixed methods research could be “merged methods”, represented by some little-known techniques, which embody in one single method the advantages of either approaches or methods (Gobo 2015). Such techniques could be an overpassing of the qualitative and quantitative divide. The lecture discusses the first two: the “inter-vey” (survey) and the “calendar interviewing” (life course, life history, autobiographical research, time diary).

Readings:


Lecture 5: **Merged methods II: two other techniques** ("Delphi method" and the "mystery shopper")

Other integrated techniques are the “Delphi method” (policy studies) and the “mystery shopper” (market research and business).

Readings:

- Michael Bloor, Helen Sampson, Susan Baker, Katrin Dahlgren (2014), Useful but no Oracle: reflections on the use of a Delphi Group in a multi-methods policy research study, in *Qualitative Research*, Vol 15, Issue 1, pp. 57 - 70

Lecture 6: **Decolonizing and creolizing methodology**

In order to become a “third paradigm” or (simply) fully overcome the qualitative/quantitative divide, mixed methods need to discharge the colonial elements still present in either approaches or methods. Critics and opponents of globalization advocate the ambition of “decolonizing methodologies” (Tuhiwai Smith 1999, see also [http://www.rangahau.co.nz/method/](http://www.rangahau.co.nz/method/)), designing indigenous methodologies (IM), implementing a participatory action research (PAR), and inventing a multicultural and creole methodology, where the global and local can cohabit.

Readings:

- Flick, Uwe and Röhnsch, Gundula (2014), Migrating Diseases: Triangulating Approaches—Applying Qualitative Inquiry as a Global Endeavor, in *Qualitative Inquiry November 20(9): 1096-109.*
participatory action research, and white studies in an urban aboriginal research agenda, Qualitative Research, 15(5), 893–910.


Lecture 7: **Sampling: outlines of a ideographic theory of samples**
An important step in the mixed methods design is sampling. The lecture explores the different concepts of sampling, offering an alternative vision that reconciles quantitative requests and qualitative needs.

Readings:

Lecture 8: **Generalizing: a dissent view**
As for sampling, also the generalization of the research findings is an important step. On this issue there are different divergent positions, which will be described and discussed. The lecture will end up with an alternative proposal.

Readings:


Lecture 9 and 10: **Student research design presentations**
See the introduction on research designs/assignments for details.
Some examples of mixed methods empirical research


Issues of integration


**Recommended for additional reading**
The literature on mixed methods is huge and growing. Among the many good books, four significant collections are:

Other books related to the topics of the course are:


The lecturer
Dr. Giampietro Gobo is Professor of Social Research Methods and Evaluation Methods at the Faculty of Humanities at the University of Milano. He holds degrees in Sociology (Master) and in Methodology and Social Research (Ph.D.). For many years, he served as Director of the centre ICONA (Innovation and Organizational Change in the Public Administration) at the University of Milan. He has taught Research Methods, Evaluation research, Epistemology, Social Studies of Science, Ethnography and Applied Ethnography on the undergraduate, graduate and postgraduate level at various universities in Italy, Germany, Norway, Spain and US.

Areas of specialization: Epistemology, Sociology of Science, Qualitative methods, Quantitative methods, Marketing research, Organization studies, Management studies, Computer supported cooperative work, Ergonomics.