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Sampling Choices in Work-Life Balance Research 1987 to 2006: A Critical Review

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ABSTRACT

This study reviewed sampling choices in 245 empirical work-life balance papers published in a range of discipline-based peer-reviewed journals between 1987 and 2006. Results showed that sampling choice in much previous literature is somewhat constrained, with a disproportionate emphasis on married, co-habiting and heterosexual parents, professional / managerial and higher skilled workers and derived from educational institutions and the public sector. Researchers should also be more transparent in providing rationales for their choices of organizations or group lists used to target respondents. Work-life balance research could also be expanded in non-industrialized countries with a greater emphasis on cross-cultural comparisons of phenomena.

Preferred Stream: Research Methods

Keywords: sampling, work-life balance, review, methodology

PAPER TEXT

The way in which individuals balance their work and non-work lives is an area of academic enquiry that has received increasing scrutiny over the past two decades. Empirical research has evolved and developed in response to, or at least in parallel with, the progressively higher profile of work-life balance issues and concerns in the media, in the rhetoric of political and business leaders, and in organizational policy and human resource priorities. These factors, in turn, have arisen from significant demographic and technological shifts in industrialized societies including an increased proportion of women (and particularly mothers) in the paid workforce, greater numbers of dual-earner couples and single parents, demand for workplace flexibility and public support for childcare and eldercare, and the rapid expansion of information technology allowing work portability (Greenhaus & Powell, 2003; Noor, 2002; Pitt-Catsouphes & Christensen, 2004; Sullivan & Lewis, 2001). The expanding literature base and the significant potential human impact of work-life balance has also prompted a number of recent reviews. These reviews have included meta-analyses of findings related to a construct of interest (Byron, 2005; Kossek & Ozeki, 1999), monographs that summarize a specific topic (Eby, Casper, Lockwood, Bordeaux, & Brinley, 2005; Greenhaus & Powell, 2006; Thornthwaite, 2004), or more rarely, methodological reviews which explore design, data sources and analytic techniques (e.g., Casper, Eby, Bordeaux, Lockwood, & Lambert, 2007; Greenhaus & Parasuraman, 1999). These studies reflect an increasing emphasis, both in organizational studies as well as other disciplines such as health, where such reviews are not only common, but are now considered research

in their own right (Evans & Kowanko, 2000), on the importance of assessing how researchers investigate real world problems in a given area of study. This paper will identify sampling choices in empirical, work-life balance studies published between 1987 and 2006. Sample selection is a critical choice in any study because all subsequent procedures, analytical strategies and evaluations of validity are contingent on that choice (Simonton, 1999). Yet systematic analyses of sample characteristics across the work-life balance literature are scarce.

Critiques of Sampling Issues

One recent study by Casper et al. (2007) investigated a range of socio-demographic characteristics of samples, including sex, marital status, child characteristics, race, hours worked, education and occupation. This study found that much relevant information regarding samples is omitted from descriptions of work-family research, highlighting the difficulty in evaluating whether existing research is likely to generalize to workers who are diverse in terms of family configuration or industry (Casper et al., 2007). Where sample characteristics were reported, samples were homogenous and excluded several important groups including diverse racial and ethnic groups, distinct cultures and non-traditional families (Casper et al., 2007). Others have also argued that much of the work-life balance literature continues to come from data collected from dual-earner families while neglecting other groups such as single parents, same-sex couples and extended families (McManus, Korabik, Rosin, & Kelloway, 2002; Noor, 2002; Perrone, 2005). These critiques are useful in identifying where the generalizability of findings might be limited and the types of target samples future research could address (e.g., non-professionals; single parents; same-sex couples). However, they are not substantive in understanding the true extent of focus on specific groups such women, professionals or dual-earning couples because the critiques are rarely empirically based. Further, while Casper et al.'s study (2007) was the first of its kind to systematically explore sampling issues in work-life balance research, as well as building on previous reviews of other methodological features such as data sources and the reliability of measures, the study confined the publications used to those in IO/OB journals up to 2003.

The choice of country or countries used in an accumulative body of work has a substantial impact on the kind of information collected over time (Scandura & Williams, 2000). The majority of work-life balance research has been conducted in Anglo-Saxon countries that are comparable in nature

(e.g. the United States and Canada), with most samples being confined to a single country (Poelmans, Spector, Cooper, Allen, O'Driscoll, & Sanchez, 2003). The concentration of research conducted in Anglo-Saxon countries is problematic because findings are not generalizable to those countries which are culturally diverse and which are often disparate to the accepted fundamentals of work-life balance research, such as high female or dual-earner labour force participation rates (Poelmans et al., 2003; Poster & Prasad, 2005). Though some recent studies have addressed this problem, investigating work-life balance phenomena in countries which are culturally dissimilar to Western, industrialized ones (Foley, Hang-Yue, & Lui, 2005; Noor, 2002, 2006; Rosenbaum & Cohen, 1999) only a handful have used cross-cultural methods of analysis by sampling in multiple countries with obviously different cultures (Joplin, Shaffer, Francesco, & Lau, 2003; Korabik, Lero, & Ayman, 2003; Poelmans et al., 2003; Poster & Prasad, 2005). Pitt-Catsoupes and Christensen (2004) argue that the concentration of sampling in industrial countries is changing for the better, with recent interest in cross-national and cross-cultural studies challenging work-life assumptions which are both country and culture bound. However, the extent of this shift has not been determined.

The Current Study

Although critiques of the methodology employed in work-life balance research are emerging, there is scope to more fully examine sample characteristics in recent literature. As reported in our analyses, 69 percent of the papers reviewed in this study were published between 2004 and 2006. Sampling issues such as the types of industries and occupations targeted and the gender breakdown of samples, may have important implications for conclusions that can be made and the accumulation of knowledge over time (Scandura & Williams, 2000). Further, we reviewed studies from a wide range of disciplines (e.g., women's studies, health, labour relations) in order to gain a sense of how work-life balance was being studied within and across traditional disciplinary boundaries.

METHODS

The following research questions were explored:

1. What characteristics do samples have? Which occupations and industries, genders and family characteristics were targeted and how do these samples correspond with populations of interest?
2. In which countries / geographic regions were studies typically situated?

Database Search and Criteria for Inclusion

A total of 245 journal articles were analyzed. They were included in the review if they met the following criteria:

- a. an empirical study, that is, it included a sampling process, measurement and analysis
- b. published in a peer-reviewed journal, that is, journals with an editorial review board whose academic affiliation is identified, before 31 December 2006
- c. full-text published in English
- d. abstract was available from the databases of EbcsoHost (Academic Source Elite, Business Source Elite and Psycinfo) and/or Proquest (all available databases)
- e. included at least one of the following terms: work-life balance/conflict/interference/culture; work-family balance/conflict/interference/culture

The initial search strategy involved searching for key and commonly used terms which are applied to this area of academic study in the citation (title, keywords, abstract). This initial search yielded a list of 1,133, from which book reviews, conceptual papers, commentary-type articles were deleted. For pragmatic reasons we also confined our sample to those which included the search terms in their key word lists (N = 245) and excluded articles which used the terms in their titles or abstracts, but not key words (N = 118). In order to assess the generalizability of this strategy we compared our sample with the second group of studies using the search terms in the title/abstract according to the discipline of the journal. Both groups were derived predominantly from journals associated with psychological science (39% and 42% respectively) and management (17% and 28% respectively), with similar, smaller numbers from other disciplines (e.g., industrial relations, health, women's studies). Some journals published papers on work-life balance frequently, such as *The Journal of Vocational Behavior* (24 articles), *Journal of Occupational Health Psychology* (14 articles) and *Journal of Family and Economic Issues* (9 articles), while the majority of journals contained only one or two publications. Questionnaires (quantitative studies) and interviews (qualitative studies) were the predominant forms of data collection. The full-text of each article was obtained either electronically (where available) or in hard copy via our library's access service.

Coding Processes

Data were coded in an Excel spreadsheet according to: (a) year of publication; (b) discipline of journal; (c) quantitative versus qualitative methodology; (d) gender breakdown; (e) occupational group(s); (f) country of sample; and (g) industry. Industry was coded according to categories used by the Australian Bureau of Statistics (ABS) and which are similar to those used in other countries (e.g., United States Department of Labor) where work-life balance research is commonly situated. Examples of industry codes included Primary industry; Manufacturing; and Retail trade. Where more than one industry was used to access a sample in a study, all industries were coded. Occupational groups were coded as (i) higher skilled professional, technical and managerial occupations (corresponding with ABS categories Managers, Professionals and Associate Professionals); (ii) manual occupations (ABS Tradespersons and Labourers) and (iii) service type occupations such as retail, hospitality and clerical workers (ABS Clerical Sales and Service Workers categories).

RESULTS AND DISCUSSION

Overview of Studies

Work-life balance as an area of interest, received only minor scrutiny up to 2000, during which time 10 or fewer studies were published each year. By far the majority of studies – 172 of 245 or 69% - were published in the years 2004, 2005 and 2006. This trend was similar for both quantitative and qualitative studies and indicates a sudden explosion of recent interest as opposed to a steady increase in publications over time. The articles (77.6% quantitative, 22.4% qualitative) were published in 127 different journals from a wide range of different academic disciplines, including health (medicine, dentistry, nursing), law, sociology, family studies, economics and industrial relations.

Sample Characteristics

Relevant information about family characteristics was available in most studies but 19% of studies did not indicate gender of respondents, 41% did not indicate occupations and 17% did not indicate industry. In the absence of consistent reporting of sample information, it is difficult to evaluate whether existing work-life balance research is likely to generalize to workers who are diverse in terms of these demographic characteristics (Casper et al., 2007).

Gender and family characteristics. Women-only samples outnumbered men-only samples by almost 5 to 1. This finding is in contrast with Casper et al. (2007) who found that in their sample of

studies 50% of participants were male. The disproportionate numbers of female-only samples in our study may reflect the inclusion of more qualitative publications (which were more likely to target women) and the inclusion of journals from a range of disciplines beyond IO/OB. Nurses and teachers were over-represented in female-only samples. Eleven of the 39 studies using female-only samples included nurses (7 exclusively) and 10 used teachers (5 exclusively). Of the male-only samples, 5 targeted fathers specifically and of the female-only samples, 21 targeted mothers specifically. Only one male-only sample targeted manual workers, while 4 used groups of men in higher-skilled occupations (senior managers, psychologists, professional sportsmen). Approximately equal numbers of studies used mainly male samples or mainly female samples (defined as greater than 60/40 percent split), while around one-third of studies were approximately gender balanced. Thus, although about half the studies we sampled were either gender-balanced or evenly split in their use of 'mainly male' or 'mainly female' participant groups, women, particularly mothers and those in traditionally female occupations, remain over-sampled in work-life balance research. This may affect comparisons of questionnaire / interview responses and the corresponding generalizability of findings because female samples self-disclose to a greater extent than males (see Dindia & Allen, 1992).

Around 7 out of 10 quantitative studies utilized diverse samples of parent and non-parent and partnered and non-partnered individuals, whereas only one-third of qualitative studies used this sample composition. Studies which specifically targeted parents or married/co-habiting couples constituted a minority of quantitative studies but more than half of qualitative publications. Two studies (1 quantitative, 1 qualitative) targeted single parents as a specific group or used them as a comparative group with partnered parents (McManus et al, 2002; Spencer-Dawe, 2005). Only 1 study (quantitative) targeted same-sex parents (Tuten & August, 2006). This focus on women, parents and/or married, co-habiting and dual earning couples, may be related to the historical emphasis on family responsibilities in this area of enquiry, as opposed to broader 'life' concerns. This may be appropriate given the continued gendered division of labour in most households and the resulting difficulties women face in balancing work and non-work responsibilities. However, if we accept that research should address the most compelling problems in society, there is clearly a need for a greater representation of, and in diverse samples, a focus on, single and same-sex parents. These sub-groups of parents are likely to

experience unique difficulties in achieving work-life balance, not least because they often receive lesser instrumental support from a partner and/or lesser acceptance of their roles from the community. Single parents also constitute a significant proportion of families with children (ABS, 2001).

Samples of individuals responsible for eldercare were similarly scarce (Barrah, Shultz, Baltes & Stolz, 2004; Gignac, Kelloway, & Gottlieb, 1996) while 5 other studies (Buffardi, Smith, O'Brien, & Erdwins, 1999; Dilworth & Kingsbury, 2005; Heymann, Penrose, & Earle, 2006; MacDonald, Phipps, & Lethbridge, 2005; Wang, Lawler, Walumbwa, & Shi, 2004) investigated the effects of eldercare in addition to other independent variables such as childcare. The impact of eldercare on employees' ability to balance paid employment and caring commitments is clearly an area for future research with around one-third of the 600,000 Australians who provide principal care for older relatives or friends being employed (Buffardi, et al., 1999). To date, little work has identified whether the needs of employees who are responsible for eldercare, differ from those with other types of caring commitments (e.g., child or disability care). However, factors such as difficulty accessing aged care services and significant disruptions to the paid work patterns of carers, such as frequent absences from the workplace, reductions in hours worked and leaving employment altogether (ABS, 2005) suggest that aged carers' needs for work-life balance initiatives are not well catered for or understood.

Occupations and industries. Of the 59% of studies where occupational group could be coded, professional, managerial and other skilled jobs (e.g., registered nurses, doctors, business executives, academics) predominated in sample selections. Around half collected data from these occupations exclusively and a further third combined high-skilled professionals/managers with other occupations. In contrast, a small number of publications used samples from manual occupational groups exclusively (e.g., assembly or automotive workers), although a further one-third used manual occupations in conjunction with professional/managerial or service-type workers. Like manual occupations, lower skilled, service/clerical workers were infrequently used in participant groups. Even where mixed occupational groups were utilized, such as random population surveys, few specifically controlled for, or compared findings for different occupational groups (see Table 1). Further, several studies referred to distinctions between blue and/or white collar workers in describing the study's sample, but none defined how these terms were understood or clarified how they impacted on the study's findings.

Rather, analyses were more likely to focus on differences in parental status, caring commitments or employment attitudes. Clarke et al. (2004) argue that perceptions of work-family balance are more influenced by psychological factors such as job satisfaction which may be more relevant to employees in professional jobs, whereas structural factors such as working hours and the household division of labour tends to influence other constructs such as work-family fit, which may be more relevant to the low skilled labour force. Thus, although the potential for further research to investigate salient work-life balance issues for professional/managerial groups is unlikely to be exhausted, future research should be more even-handed in its examination of precarious employees who often have greater difficulty in achieving balance than those in more privileged jobs.

Despite their increasing complexity, work-life balance studies have substantially limited the types of samples typically used and the organizations from which research participants are derived. The predominance of professional/ managerial workers, particularly occupations such as teachers, university academics and registered nurses, is problematic in terms of drawing overall conclusions about how employees balance work and non-work responsibilities. The finding is also consistent with Casper et al. (2007) that 68% of participant groups in their review were managers or professionals. Although, the proportion of manual workers (e.g., butcher, gardener, dressmaker) has been decreasing in industrialized countries, they still constitute around one-fifth of the workforce (ABS, 2001). Further, elementary and intermediate clerical, sales and service workers (e.g., bar attendant, child-care worker, enrolled nurse) constitute 26.7 percent of all employees (ABS, 2001).

The constraints associated with the timing and location of many manual occupations and lower skilled, service-type jobs, such as fixed working hours, lack of choice in number of hours worked, casual or fixed-term employment, the necessity for customer/client contact (e.g., retail worker) or for the work to be conducted at a particular site (e.g., mechanic), suggest these workers have less control over how they balance work and non-work domains. Indeed, Pocock (2005) argues that work-life issues are not about policy initiatives on the incidental sidelines of human resource management, but go to basic issues like hours worked. The shortfall in rights and benefits associated with casual, low-skilled or semi-skilled work in particular, compared with permanent employment, is particularly sharp because it lacks tenure, offers no career path, and is associated with low present and

uncertain future income (Harley & Whitehouse, 2001; Pocock, Buchanan, & Campbell, 2004). The lesser personal control over the timing and location of work associated with these jobs is likely to be more problematic for achieving work-life balance. Paradoxically however, this low control may lead to a reduced emphasis on these occupations as sources of data because there is lesser scope to recommend changes to policies and practice. A similarity bias may also be operating, whereby the terrain of these jobs is unfamiliar to academic researchers. Indeed, tertiary education sector employees were used as respondents in around 10% of studies in this review.

In a similar way to the use of high-skilled occupations in participant groups, studies that selected specific organizations for enquiry (i.e., not population-based surveys), tended to include those in sectors where office workers and professionals predominate. The most frequent industry category was Education, which was targeted for sample selection in one-fifth of all studies using organization-based samples. Samples in the category Government, administration and defence were also frequently accessed, while the industries Health and community, Finance and insurance, Communication, Manufacturing, and Property and Business were moderately targeted. Samples derived from the remaining industry categories were much less frequent (see Table 1). In sum, samples of organizations employing relatively larger proportions of professional employees were over-represented in study samples at the expense of organizations employing a low-skilled or semi-skilled workforce. This suggests that the organizations sampled in much work-life balance research is not representative of the population of organizations to which they purport to generalize.

Geographic regions. Data for the majority of studies were collected in one of 36 different countries. More than half of these studies were carried out in North America (mainly the United States). The next most represented regions were Australia and the South Pacific, the UK and Ireland, Western Europe and the Nordic countries. Less than 5% of studies were conducted in Asia and no samples were drawn from South America or Africa. A further 26 studies in our initial search were published in a language other than English, 23 in a European language and 3 in an Asian language. The concentration of studies in industrialized countries suggests there is ample scope for broadening work-life balance research to politically and culturally diverse areas, particularly Africa, South and Latin America and the Middle East. The paucity of research arising from these regions, even in non-

English publications, reflects a significant bias towards research which is carried out in, and more importantly, findings which only apply to, Western, industrialized workers. This Western-centrism has also been identified in reviews of other areas of interest (e.g., Suzuki, 2004).

In contrast to single-country studies, fifteen publications (6%) collected data from multiple countries, 12 of which compared and contrasted variables across culturally diverse regions such as India, Indonesia, Mexico and Taiwan. The remaining 3 cross-national studies compared data from two or more similar countries (e.g., England and Scotland). The few cross-cultural studies provide exemplars for future research. For example, Poster & Prasad (2005) explored trans-cultural work-family relations between the United States and India, to address what they argued were several shortcomings in the literature, including socio-historical located trends and institutions, and systems of power and inequality that shape their enactment and implementation. Cross-cultural comparisons of work-life balance issues address not only the problems faced in diverse regions themselves, but may also better illuminate the types of structures that differentially impact on work-life balance in industrialized nations. That is, the greater contrast in political, economic, cultural and employment variables than those in single-country studies may provide important insights into hypothesized relationships between the phenomena investigated.

Limitations of the Study

The limitations of this review are related firstly to the parameters applied for the selection of material used for analysis and secondly, to the components of the studies investigated. We reviewed only journal articles and not published books, conference papers or other refereed or non-refereed sources. Our findings and conclusions therefore, are confined to published journal articles. The search strategy was also limited to key words (work-life balance, work/family conflict and so on) within two popular electronic academic databases. Inevitably, any search strategy will exclude a range of articles which could potentially encompass the broader work and family/life literature. Indeed, the overlap in articles included in two recent reviews in the area and published in the same journal (Ford et al., 2007 and Casper et al., 2007) was less than 28 percent.

We also excluded articles not written in English, an approach which is referred to by Gregoire, Derderian, and Le Lorier (1995) as the "Tower of Babel Bias", a term derived from a biblical narrative

which refers to the differential outcomes of meta-analyses that use English-only articles and those that include all articles in the area of interest. Although we did refer to additional articles published in other languages, very few of which were published in non-European languages, it is acknowledged that other non-English articles are likely to be published in journals which may be peer-reviewed but are more localized in their readership. Thus, our conclusions about the Anglo-centric nature of work-life balance research are limited to publications having an international readership.

The research questions were limited to sampling characteristics at the expense of other, potentially important contributions of the literature such as the theoretical orientations, measurement issues and analytic techniques. This strategy of limiting the scope of the study was necessary to comprehensively address strengths and weaknesses of the selected categories while meeting the length requirements of a single publication. However, it would be useful in future work to compare any differential impacts of choices in methods, such as sample characteristics and selection and/or the types of constructs operationalized, on work-life balance outcomes across the literature.

Conclusions

Results of this study showed that sampling choice in much previous literature is disproportionately focused on married/co-habiting couples, and would be enhanced by targeting single and same-sex parent families. More research is also needed to understand work and family issues of manual and lower-skilled service workers, and employees providing eldercare. Researchers should also be more transparent in providing rationales for their choices of organizations or group lists used to target respondents. Work-life balance research could also be expanded in non-industrialized countries with a greater emphasis placed on cross-cultural comparisons of phenomena. Targeting these under-researched samples, applying research to cross-cultural contexts and undertaking more specific comparative analysis in large, diverse samples would better identify the conditions under which work-life balance theories operate and address the over-generalization which exists in the majority of research to date. This empirical evidence would further legitimize work-life balance research as a rigorous and methodologically robust area of academic enquiry and provide an improved evidence-base from which policy and practice can be developed.

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Table 1. Sample Characteristics

Category	Codable Studies	N	% (of codable studies)
Gender of sample	200 (81%)		
Female-only		39	19.5
Male-only		8	4.0
Mainly female		39	19.5
Mainly male		40	20.0
Gender balanced		74	37.0
Family Characteristics	233 (95%)		
Mixed family types		146	62.2
Parents (targeted specifically)		61	26.2
Partnered, with or without children		23	9.9
Single parents		2	.9
Same-sex parents		1	.4
Targeted Occupations	145 (59%)		
High skilled professional, technical or managerial		65	44.9
Lower skilled service/ clerical workers		15	10.4
Manual workers		11	7.5
High skilled + low skilled service/clerical workers		11	7.5
Manual + high skilled + low skilled		43	29.7
Industries	204 (83%)		
Education		39	19.1
Gov, admin, defence		32	15.7
Health and community		24	11.8
Finance and insurance		23	11.3
Communication		19	9.3
Manufacturing		18	8.8
Property and business		15	7.3
Retail trade		9	4.4
Personal and other services		7	3.4
Construction		5	2.4
Accommodation, cafes, restaurants		5	2.4
Wholesale trade		2	1.0
Transport and storage		2	1.0
Cultural and recreational		2	1.0
Primary Industry		1	.5
Mining		1	.5
Electricity, gas and water		0	0
Geographic region	242 (98%)		
North America		141	58.3
Australia / Sth Pacific		24	9.9
UK and Ireland		19	7.9
Western Europe		16	6.6
Nordic Countries		10	4.1
Asia		11	4.6
Middle East		5	2.1
Mexico / Central America		1	0.4
Cross-cultural studies		12	4.9
Cross-national studies		3	1.2

Note. ^aNs equal greater than total as some studies used more than one sampling strategy