



UNDERSTANDING CASE STUDY RESEARCH

Small-scale Research with Meaning



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Origins and Applications of Case Study

INTRODUCTION

This chapter seeks to provide an overview of case study as a research design (i.e. a way of pursuing a particular research project; the status of case study is considered in more detail in Chapter 3). Its five main sections consider:

- what we mean by ‘case study’
- how case study has developed over time
- how it is interpreted and applied in different disciplines
- the different types of case study
- the relations between research case studies (the main focus of this book) and teaching case studies.

All of these issues are discussed further, and illustrated by the use of example case studies from a range of disciplines, in the remainder of the book.

WHAT IS A CASE STUDY?

All research studies cases: instances or examples of particular things (e.g. people, animals, planets, companies, schools, works of art, elements, policies, ideas). This does not mean, however, that all research projects are case studies.

Much research takes an alternative approach, and focuses on specific and limited aspects of cases (commonly referred to as variables: e.g. people’s opinions, animals’ habits, planets’ orbits, companies’ balance sheets), measuring and exploring their variation, and relationships with other variables, for a given sample of cases. This is the more typical approach taken in scientific and/or quantitative research.

The term ‘case study’ is, or should be, reserved for a particular design of research, where the focus is on an in-depth study of one or a limited number of cases. In practice, however, its use is rather messier and more complex:

To refer to a work as a ‘case study’ might mean: (a) that its method is qualitative, small-N, (b) that the research is holistic, thick (a more or less comprehensive examination of a phenomenon), (c) that it utilizes a particular type of evidence (e.g. ethnographic, clinical, nonexperimental, non-survey-based, participant-observation, process-tracing, historical, textual or field research), (d) that its method of evidence gathering is naturalistic (a ‘real-life context’), (e) that the topic is diffuse (case and context are difficult to distinguish), (f) that it employs triangulation (‘multiple sources of evidence’), (g) that the research investigates the properties of a single observation, or (h) that the research investigates the properties of a single phenomenon, instance or example. (Gerring 2007, p. 17)

To compound matters further, Gerring (2007, p. 18) goes on to note that case study has a large number of variants or synonyms: ‘single unit, single subject, single case, N=1, case-based, case-control, case history, case method, case record, case work, within-case, clinical research’.

So what is a case study? Box 2.1 contains eleven definitions of case study, selected from among the many available in the literature, and organised by date. It illustrates both the development of our understanding of case study over time (the subject of the next section), and the similarities and differences in these understandings at any one time.

■ ■ ■ **Box 2.1 Definitions of Case Study** ■ ■ ■

A case study, basically, is a depiction either of a phase or the totality of relevant experience of some selected datum. (Foreman 1948, p. 408)

A case study is expected to catch the complexity of a single case... Case study is the study of the particularity and complexity of a single case, coming to understand its activity within important circumstances. (Stake 1995, p. xi)

[T]he single most defining characteristic of case study research lies in delimiting the object of study, the case... If the phenomenon you are interested in studying is not intrinsically bounded, it is not a case. (Merriam 1998, p. 27)

An educational case study is an empirical enquiry which is: conducted within a localized boundary of space and time... into *interesting* aspects of an educational activity, or programme, or institution, or system; mainly in its natural context and within an ethic of respect for persons; in order to inform the judgements and decisions of practitioners or policy-makers; or of theoreticians who are working to these ends; in such a way that sufficient data

are collected for the researcher to be able... to explore *significant* features of the case... create *plausible* interpretations... test for the[ir] trustworthiness... construct a *worthwhile* argument... [and] convey *convincingly* to an audience this argument. (Bassey 1999, p. 58, emphasis in original)

A case can be an *individual*; it can be a *group* – such as a family, or a class, or an office, or a hospital ward; it can be an *institution* – such as a school or a children’s home, or a factory; it can be a large-scale *community* – a town, an industry, a profession. All of these are single cases; but you can also study *multiple* cases: a number of single parents; several schools; two different professions. (Gillham 2000, p. 1, emphasis in original)

A case study is a research strategy that can be qualified as holistic in nature, following an iterative-parallel way of proceeding, looking at only a few strategically selected cases, observed in their natural context in an open-ended way, explicitly avoiding (all variants of) tunnel vision, making use of analytical comparison of cases or sub-cases, and aimed at description and explanation of complex and entangled group attributes, patterns, structures or processes. (Verschuren 2003, p. 137)

A ‘case study’... is best defined as an intensive study of a single unit with an aim to generalize across a larger set of units. (Gerring 2004, p. 341)

[C]ase study is a transparadigmatic and transdisciplinary heuristic that involves the careful delineation of the phenomena for which evidence is being collected. (VanWynsberghe and Khan 2007, p. 80)

A case study is a study in which (a) one case (single case study) or a small number of cases (comparative case study) in their real life context are selected, and (b) scores obtained from these cases are analysed in a qualitative manner. (Dul and Hak 2008, p. 4)

A case study refers to the study of a *social phenomenon*: carried out within the boundaries of one social system (the case), or within the boundaries of a few social systems (the cases)... in the case’s natural context... by monitoring the phenomenon during a certain period or, alternatively, by collecting information afterwards with respect to the development of the phenomenon during a certain period... in which the researcher focuses on process-tracing... where the researcher, guided by an initially broad research question, explores the data and only after some time formulates more precise research questions, keeping an open eye to unexpected aspects... using several data sources, the main ones being (in this order) available documents, interviews with informants and (participatory) observation. (Swanborn 2010, p. 13, emphasis in original)

Case studies are analyses of persons, events, decisions, periods, projects, policies, institutions or other systems which are studied holistically by one or more methods. The case that is the subject of the inquiry will be an instance of a class of phenomena that provides an analytical frame – an object – within which the study is conducted and which the case illuminates and explicates. (Thomas 2011a, p. 23)

The first three definitions usefully focus on key elements of our common understanding of case study. Thus, Foreman, in the earliest of the definitions given, stresses that case study is about a particular item, thing or case; or, in his words, 'some selected datum'. Stake points out that the case being studied is both particular and complex; after all, if it were not the former, it would not be a case, and, if it were not the latter, it would scarcely be worth studying. And Merriam notes that the case needs to be bounded or delimited; as she says, if it isn't, it isn't a case, and you are not then engaged in case study but in some other kind of research.

Seven of the other eight definitions stress other aspects of case study which most of its proponents would agree with. Thus, Bassey, Verschuren, Dul and Hak and Swanborn all emphasise that the case is to be studied in its 'natural' or 'real life' context. Cases are not artificial entities, they are not experiments, but are part of our reality, from which – even though, as cases, they are bounded – they cannot be separated.

Both Verschuren and Thomas point out that case study is a holistic research strategy. We study (or, at least, attempt to study) the entirety of the case, not selected aspects of it. In practice, this may mean that we study as much of the case as we can in a given period of time. Gillham, Dul and Hak and Swanborn stress that case study need not be confined to single cases, but might involve the comparative study of two or more cases.

Some of the elements of the different definitions could, however, be said to fall into the categories of desirable or idealistic. Bassey writes of case studies focusing on 'interesting aspects' and 'significant features', leading to the construction of a 'worthwhile argument', all of which is definitely a desirable quality, and most probably sought for at the outset of the case study, but not necessarily guaranteed. What is interesting or significant for one researcher may not be so for another, though all would hope and aim for their arguments to be worthwhile.

Gerring states that the aim of case study is 'to generalize', which might not always be feasible, and indeed would be rejected as an aim by some case study researchers. The case might be of interest for its own sake, or might be too particular, or the researcher might be unsure about whether their findings were generalisable. The issue of generalisability is a key one in discussions of case study, and we will return to it in more detail in Chapter 3.

Verschuren's argument that case studies should be observed in 'an open-ended way' might also be questioned in terms of its practicality. Most researchers do not have indefinite time to devote to a piece of research, and, after all, one of the main attractions of case study research is that it is small-scale and focused. In Verschuren's definition, it is also by no means clear what is signified by 'an iterative-parallel way of proceeding', which seems to introduce unnecessarily complicated jargon to what is meant to be a straightforward definition.

Other elements of some of the definitions are more particular, and might be debated or disagreed with. Thus, when Dul and Hak specify that case studies are to be analysed 'in a qualitative manner', they are revealing both their own preference and the most

common strategy (although their preference seems to be immediately compromised by their reference to ‘scores’). It is also possible to analyse case studies, either wholly or partly, in a quantitative manner; though, as we shall see, Dul and Hak are not alone in their view.

Something similar is going on when Swanborn unnecessarily restricts case study to the study of ‘social phenomenon’ which is presumably his focus and interest. Other kinds of natural phenomena (e.g. the dissemination of diseases, weather patterns, the hunting strategies of particular animals) might also lend themselves to a case study approach.

Perhaps the most unusual of the eleven definitions offered is that of VanWynsberghe and Khan, who describe case study as a ‘transparadigmatic and transdisciplinary heuristic’, or, in other words, a way of researching that can be applied in almost any circumstance. That seems rather an obscure way of setting out a definition. While the second part, ‘the careful delineation of the phenomena for which evidence is being collected’, seems more straightforward, it could be applied equally well to many research designs.

Of course, when we are discussing anything of significance, which case study certainly is, there are bound to be differences of opinion and variations in understanding. This is how academics and researchers work to advance and develop our thinking. So it is not surprising that we can readily identify differences and disagreements between these definitions (and there are many others that could have been used). But the commonalities between them are stronger, and, as well as clarifying what case study is, they also help to make it clear what case study is not.

We can be reasonably confident, then, in stating that case study involves the following:

- The study of a particular case, or a number of cases.
- That the case will be complex and bounded.
- That it will be studied in its context.
- That the analysis undertaken will seek to be holistic.

Case study is not, as we have already noted, an experiment (though it might be combined with an experimental research design: see Chapter 6). Nor is it a survey or a large-scale analysis. Case study is *small-scale research with meaning* (this interpretation is discussed in more detail in Chapter 4).

THE ORIGINS AND HISTORY OF CASE STUDY

The history of case study is a long and complicated matter: only a brief overview will be given here.

The development of case study as a research design both encompasses and illustrates the issues and critiques (these are discussed at greater length in Chapter 3) which it has had to deal with throughout its history. It also further demonstrates the

diversity of usage to which the term case study (and analogous terms) has been put, and its application in a wide variety of disciplines (the subject of the next section and of Chapter 5).

Burgess (1927) offers an account of the early application of case study in American sociology. He notes that ‘The case-study method was first introduced into social science as a handmaiden to statistics’ (p. 114), with the latter long regarded – as it still is in many quarters today – as the most desirable way of undertaking research. In other words, case study was seen largely as a means for fleshing out and providing detailed illustration or exemplification to complement quantitative analyses, rather than as an alternative to them.

Burgess considered that ‘the actual introduction of the case-study as a method of sociological field research was made by Thomas and Znaniecki in *The Polish Peasant in Europe and America*’ (p. 116), which was first published in 1918 (see also Adelman 2015). This places case study (at least in its sociological context) as being about a century old. Unsurprisingly, then, Burgess, writing when case study was less than a decade old, concludes that ‘it is apparent that case-study as a method in sociology is still in its infancy’ (p. 117). Others, however, date the origin of case study research as rather earlier, with Scholz and Tietje (2002, p. 4) referencing the work of the French sociologist Le Play in 1855, adding more than half a century to Burgess’s reckoning.

Writing nearly 20 years after Burgess, Symonds (1945) reports on what was then recent work on the use of case study, in particular with respect to personality research. It is apparent from his argument and conclusion how important, despite the greater development and acceptance of the method, statistics and ‘objectivity’ remained:

[M]uch remains to be done to improve its methodology so that case materials may be amassed and treated in a manner that includes, on the one hand, objective appraisal and statistical integrity and that, on the other hand, never loses sight of the integrated, dynamic, holistic picture of human personality which the case study approach to research uniquely may give. (p. 357)

To survive alongside more ‘scientific’ methods, particularly statistics – with which it was constantly compared – case study had to be carried out in a suitably rigorous fashion (Burgess 1941; Cottrell 1941; Maxfield 1930; Stouffer 1941). From its beginnings, therefore, a great deal of attention has always been given to trying to devise common standards or approaches to case study.

Thus, Foreman (1948) sought to develop a theory of case studies. He argued that case studies use three sorts of data – personal documents, participant observation and third-person reports (a rather partial listing to the modern eye) – and that they may be used in five ways in sociological research: ‘They may serve purposes of: (1) illustration; (2) concept and hypothesis development; (3) hypothesis testing; (4) prediction or postdiction; (5) methodological testing or refinement’ (p. 410). He goes on to consider the adequacy of case records and their interpretation, how this may be judged, and the thorny issue of generalisation.

In the 1950s, however, case study became less popular for a period in the social sciences. As Platt (1992) notes, in her analysis of the history of case study in American methodological thought:

The term ‘case study’ has played a variety of roles, changing over time, in American methodological discussion... Its use has often been imprecise, carrying ideological connotations rather than analytical denotation. (p. 17)

She associates the post-war decline in the popularity of case study with a variety of other factors as well, including continuing concern with the issues of generalisation and prediction, problems with the articulation of case study analysis, and increased competition from the development of more sophisticated quantitative techniques and associated databases (an area in which American social science led the world).

Case study research began to make a comeback in the late 1960s and 1970s (Simons 1980, 2009), as qualitative techniques assumed a greater importance and popularity, particularly outside North America:

In the last 25 years the shift away from quantification and large scale survey methods in the social sciences, alongside the increasing attention being given to language and meaning in constructing identity and social relations, has seen a significant revival in case study methods. This has led to a range of reappraisals of the method, and an increased emphasis upon lived experience, the life-story and the biographical/autobiographical in social research. (David 2006, p. xxxix)

The increased development and diversification of qualitative methods (e.g. Denzin and Lincoln 2005a) both helped to build up the contemporary popularity of case study as a research design and led to its mistaken identification in some quarters as solely a qualitative approach. Its scale and accessibility as a research design resulted in its increasing usage by the growing numbers of final-year undergraduates, postgraduates and small-scale researchers in the social sciences and beyond.

CASE STUDY IN DIFFERENT DISCIPLINES

Swanborn (2010) identifies several disciplinary sources of importance in the development of case study:

- The growth and development of many sciences, such as the health sciences, clinical psychotherapy and law [not usually considered a science], went hand in hand with the study of cases...
- A specific source of inspiration in social science is constituted by the traditional study of a village or local setting in cultural anthropology...
- A third source is the sociological Chicago School...

- In political science, historical roots include a strong tradition building on case studies...
- Well-known from the field of psychology are the studies of Sigmund Freud and other psychoanalysts. Later on, the study of individual persons (cases) on other domains, such as personality psychology and clinical psychology, developed.
- More recently, the study of cases in many policy fields (e.g. social work, youth support, labour market intermediary, the integration of ethnic minorities) presents new impulses. (p. 11)

In other words, there are many diverse ‘traditions’ of case study research, which have been developed and pursued often with little reference to, or even knowledge of, each other. This is, however, by no means unusual in academic research. What case study means, therefore, in political science will be at least subtly different from what it means in sociology (as will the sources referred to), and significantly different from its practice in disciplines which are further removed, such as psychotherapy or health care.

The importance of case study to a range of disciplines has been maintained up until the present day. It is particularly evident (and prevalent) now in the business/management area; for example, in accounting (Cooper and Morgan 2008), industrial marketing management (Beverland and Lindgren 2010), international business (Piekkari, Welch and Paavilainen 2009), operations management (Voss, Tsikriktsis and Frohlich 2002), public administration (Barzelay 1993) and small business studies (Chetty 1996).

Outside the business/management field, case study is most closely associated with other professional disciplines, which have come to dominate provision in most universities and colleges. The most prominent, after business/management, are health/medicine (Jones and Windholz 1990; Lukoff, Edwards and Miller 1998; Yin 1999) and education (Snyder 2012; Stenhouse 1979). Other professional disciplines with strong traditions and current usages of case study include development (Vellema, Ton, de Roo and van Wijk 2013), information systems (Cavaye 1996; Dube and Pare 2003), law (Caulley and Dowdy 1987) and social work (Lee, Mishna and Brennenstuhl 2010).

Case study research is not, however, as already indicated, solely the preserve of professional disciplines, but is also widely practised in what might be termed the ‘pure’ (as opposed to applied) disciplines. These include geography (Curtis et al 2000), philosophy (Ruzzene 2012), political science (Gerring 2006), psychology (Stewart and Chambless 2010) and sociology (Burrawoy 1998).

Some of the studies referenced offer practical guidance on how to apply case study in the discipline in question, while others offer surveys of the ways in which case study has been applied. Examples of case study analyses from different disciplines, and from around the world, including those referred to here, will be presented and discussed in more detail in Chapter 5.

TYPES OF CASE STUDY

Proponents of case study have long recognised that there are different sorts of, or approaches to, case study. Box 2.2 sets out nine alternative typologies of case study: eight of them were suggested during the last two decades, along with an earlier categorisation. These are by no means the only typologies that have been suggested, although they include some of the most influential and most widely cited. It is clear that the more recent examples draw on the earlier examples (compare, for example, Eckstein and Levy). The nine examples given do, however, usefully illustrate the variety of considerations that different authors bring to bear, and the different terminologies used, as well as their common concerns.

■ ■ ■ Box 2.2 Types of Case Study ■ ■ ■

- 1 Configurative-idiographic study – dealing ‘with complex collective individuals’
 - 2 Disciplined-configurative study – ‘application to cases of frameworks of inquiry’
 - 3 Heuristic case studies – ‘serving to find out’
 - 4 Plausibility probes – to establish whether broader, more painstaking studies might be valuable
 - 5 Crucial case studies – tests of theory. (Eckstein 1975, pp. 97–113)
-
- 1 The intensive case study (including interpretative and explanatory)

‘The goal is to provide a history, description or interpretation of unique and typical experiences or events. These events become the basis for developing theory from an understanding of the context in which certain events occurred.’
 - 2 Comparative case studies (case surveys, case comparisons, creative interpretations)

‘...emphasize the use of contrasting observations from varied settings and highlight the development of clear concepts.’
 - 3 Action research

‘[A] term for describing a spectrum of cases that focus on research and learning through intervening and observing the process of change.’ (Cunningham 1997, pp. 402, 405)
-
- 1 Descriptive (exploratory-descriptive, focused-descriptive)
 - 2 Theoretical-heuristic (grounded theory building, hermeneutic work)
 - 3 Theory-testing (testing propositions within grounded theory, metatheoretical construction). (Edwards 1998)

(Continued)

(Continued)

1 Holistic

'A holistic case study is shaped by a thoroughly qualitative approach that relies on narrative, phenomenological descriptions. Themes and hypotheses may be important but should remain subordinate to the understanding of the case.'

2 Embedded

'Embedded case studies involve more than one unit, or object, of analysis and usually are not limited to qualitative analysis alone.' (Scholz and Tietje 2002, p. 9)

- 1 Intrinsic, 'if the study is undertaken because, first and last, one wants better understanding of this particular case';
- 2 Instrumental, 'if a particular case is examined mainly to provide insight into an issue or to redraw a generalization';
- 3 Multiple or collective, when 'a number of cases may be studied jointly in order to investigate a phenomenon, population or general condition'. (Stake 2005, p. 445)

1 Typical

2 Diverse

3 Extreme

4 Deviant

5 Influential

6 Crucial

7 Pathway (i.e. chosen to elucidate causal mechanisms)

8 Most-similar

9 Most-different. (Gerring 2007, pp. 89–90)

1 Idiographic (inductive or theory-guided) –

'which aim to describe, explain or interpret a particular "case" and which can be either inductive or theory-guided'.

2 Hypothesis-generating

3 Hypothesis-testing

4 Plausibility probes (pilot or illustrative studies) –

'an intermediary step between hypothesis generation and hypothesis testing and which include "illustrative" case studies'. (Levy 2008, p. 3)

1 Explanatory or causal

2 Descriptive

3 Exploratory

All of which may be single or multiple. (Yin 2009, pp. 19–21)

- 1 Subject ‘the case itself’ and object ‘the analytical frame or theory through which the subject is viewed and which the subject explicates’
- 2 Purposes and approach – theory-centred or illustrative
- 3 Comparative/non-comparative – employment of time. (Thomas 2011c, p. 511)

The classifications are all fairly simple, most involving no more than two, three, four or five categories, though Gerring’s includes nine. Some, however, then break the categories down further in another hierarchical level, or identify a series of dimensions or spectra along which the characteristics of case studies vary.

Thomas’s classification is probably the most complex, as it involves at least three distinctions: whether the focus is on the subject (the case itself) or the object (the theoretical framework adopted), whether the case study is theory-centred or illustrative, and whether a comparative or non-comparative approach is adopted. The last two of these distinctions are common to, though differently expressed in, many of the typologies.

The comparative/non-comparative distinction concerns whether the focus of the study is on a single case or more than one case (a point highlighted in their definitions of case study by Gillham and Swanborn: see Box 2.1). Cunningham also refers to this distinction as comparative, while both Stake and Yin use the alternative terms ‘multiple’ or ‘collective’, while for Scholz and Tietje this element is wrapped up in their ‘embedded’ category.

Levy, following Eckstein, offers ‘plausibility probes’ as one type of case study, by which is meant what is now more commonly termed a pilot study. This obviously has overlaps with the single/multiple case study distinction, as it implies that more cases will then be selected for study once the pilot study has been completed, and lessons have been learnt from it.

Whether or not the focus of the case study is on theory is also a key concern. A focus on theory is conveyed by Eckstein in his ‘disciplined-configurative’ type, by Cunningham in the term ‘intensive’, by Edwards in the ‘theoretical-heuristic’ and ‘theory-testing’ distinctions, by Levy in the ‘idiographic’ type (and also, to an extent, in the ‘hypothesis-generating’ and ‘hypothesis-testing’ types), and by Yin in his ‘explanatory or causal’ category.

Alternatively, a focus which is explicitly not on theory is classified by both Edwards and Yin as ‘descriptive’, and by Eckstein as ‘configurative-idiographic’.

Other elements are emphasised in their classifications by just one of the authors included. For Scholz and Tietje, the holistic/embedded distinction is partly about the use of qualitative and/or quantitative methods. Cunningham links case study to another research design when he uses ‘action research’ as one of his categories (this linkage is further discussed and exemplified in Chapter 6). Edwards brings in a further research design when he links both of his ‘theoretical-heuristic’ and ‘theory-testing’ categories to grounded theory (which is also discussed in Chapter 6). Gerring’s classification is unusual in emphasising the relation of the case to the population from which it is chosen.

Other distinctions do not appear in any of the eight classifications considered here. The most notable of these is probably the distinction between teaching and research case studies, which is discussed in the next section.

It is worth mentioning here the contributions to this discussion of another two authors. First, Mitchell (1984, p. 239) introduces a typical/telling case dichotomy (cf. Gerring's use of typical and influential) in this context:

A good case study... enables the analyst to establish theoretically valid connections between events and phenomena which previously were ineluctable. From this point of view, the search for a 'typical' case for analytical exposition is likely to be less fruitful than the search for a 'telling' case, in which the particular circumstances surrounding a case serve to make previously obscure theoretical relationships suddenly apparent.

Second, Simons (2009, pp. 21–22), after noting Stake's distinction between intrinsic, instrumental and collective cases, and the theory-led or theory-generated categorisation, also draws attention to evaluation and ethnographic case studies. These last two categories reflect, on the one hand, the purposes to which case study research is often put, and on the other hand, particular traditions of case study research (both of which are discussed in more detail in Chapter 6).

While none of the nine typologies seems entirely satisfactory, therefore, and their use of alternative terms to mean the same thing (or, at least, much the same thing) is confusing, this analysis suggests that there are three major factors to bear in mind when considering examples of case studies:

- Whether they focus on a single case or involve a comparative study of two or more cases.
- Whether they confine themselves to description or engage with theory.
- Whether they are intended primarily to support teaching or research.

While the third of these factors is discussed next, the first two are considered in more detail in Chapter 8.

TEACHING AND RESEARCH CASE STUDIES

In some disciplines, case study is used as a teaching method as well as, or instead of, a research method. This is common, for example, in various disciplines in the health/medicine field (e.g. Bair 1980), in law (e.g. Caulley and Dowdy 1987) and social work, and in business/management studies (e.g. Forman 2006; Garvin 2003; Zhao 1996). Case studies are used, for example, to explore and exemplify particular medical conditions, legal precedents or business problems.

To take the example of business/management, Romm and Mahler (1991) offer 'a new approach to an old method', focusing on the use of case studies in teaching. They provide sets of guidelines for their usage, arguing that:

By tailoring the use of cases to specific objectives and by matching these objectives with a diverse and imaginative case-related repertoire of methodologies, we can turn case analysis into a theoretically relevant, personally meaningful, and thoroughly enjoyable experience. (p. 300)

Contardo and Wensley (2004) also focus on the use of case studies in teaching and, in particular, on how the Harvard Business School has been both celebrated and constrained by its adherence to a particular form of the case method.

While recognising this broader usage, and accepting that teaching and research case studies may overlap, the focus in this book will be primarily on case study as a research method.

SUMMARY

In this chapter, we have:

- defined case study as involving the study of a particular case, or a number of cases, where the case will be complex and bounded, studied in its context, with the analysis undertaken seeking to be holistic
- indicated that different kinds of case study are recognised, notably whether they are single or multiple, and whether they are theoretical or descriptive
- shown that case study has been practised for at least a century, with its popularity and usage varying over time
- noted how case study is employed in a wide variety of disciplines, and that it is sometimes used for teaching as well as research purposes.

KEY READINGS

As will be clear from the discussion and references given so far, this is neither the first nor the only guide to case study research to be published. There are several introductory volumes which may usefully be consulted, including:

- Gillham, B (2000) *Case Study Research Methods*. London, Continuum.
 Stake, R (1995) *The Art of Case Study Research*. Thousand Oaks, CA, Sage.
 Swanborn, P (2010) *Case Study Research: What, why and how?* London, Sage.
 Thomas, G (2011a) *How to Do Your Case Study: A guide for students and researchers*. London, Sage.
 Yin, R (2009) *Case Study Research: Design and methods* (4th edition). Thousand Oaks, CA, Sage.