

RESEARCH METHODS

FOR BUSINESS STUDENTS

NINTH EDITION

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Research Methods for Business Students



Box 6.2 Focus on student research

Gaining access to a suitable sample

Maria wished to discover how component suppliers viewed the just-in-time delivery requirements of large manufacturing organisations that they supplied. Two large manufacturing organisations agreed to introduce her to a sample of their component suppliers

whom Maria could then interview. While undertaking her telephone interviews Maria noted that all of the interviewees' responses were extremely positive about the just-in-time delivery requirements of both large manufacturing organisations. As both manufacturing organisations had selected who she could interview, Maria wondered whether these extremely positive responses were typical of all the component suppliers used by these organisations or whether they were providing an unreliable and untypical picture.

possible to gain access to data then it will need revising. Once you have a proposal that you believe will be feasible in general terms, the next point to consider is whether you will be able to gain sufficient access to fulfil all of your research objectives. **Sufficiency** is the extent to which the access you negotiate will be enough to answer your proposed question and achieve your research objectives. You do not want to have to say, 'I could achieve research objectives a, b and c but not x, y and z!' Or, perhaps more likely, 'I can achieve research objectives a and b, but now I think about this carefully, I'm going to find it difficult to collect much data for c and x, which will then mean I can't do y and z!' You therefore need to consider fully the nature of the access that you will require and whether you will be able to gain sufficient access in practice to meet your objectives, to answer your research question. The clarity, which should result from having considered the nature and extent of the access that you require, will also be helpful in persuading organisations or groups to grant access since they are more likely to be convinced of your credibility and competence.

6.3 Researcher status

Even when you consider feasibility and sufficiency carefully, access is still unlikely to be straightforward, requiring persistence and emotional resilience (Peticcia-Harris et al. 2016). However, with careful planning you will be able to anticipate and, hopefully, overcome problems that occur in practice. Drawing on this, you may wish to consider where you are likely to be able to gain access and amend your topic and research design to reflect the nature of access. As Buchanan et al. (2013: 53–4) note:

Fieldwork is permeated with the conflict between what is theoretically desirable on the one hand and what is practically possible on the other. It is desirable to ensure representativeness in the sample, uniformity of interview procedures, adequate data collection across the range of topics to be explored and so on. But the members of organisations block access to information, constrain the time allowed for interviews, lose your questionnaires, go on holiday and join other organisations in the middle of your unfinished study. In the conflict between the desirable and the possible, the possible always wins.

Problems of access may also vary with regard to your status relative to the organisations, groups or people you wish to research. We now consider these in more detail.

Access issues as an external researcher

If you are approaching one or more organisations or groups where you have little or no prior contact, you will be an **external researcher**. You will need to negotiate access at each level discussed earlier (physical/virtual, cognitive and continuing). Operating as an external researcher is likely to pose problems, although it may have some benefits. Your lack of status in relation to an organisation or group in which you wish to conduct research will mean gaining physical or virtual access is a major issue, and this concern will remain in relation to negotiating cognitive access (Box 6.3). Goodwill on the part of the organisation or group and its members is something that external researchers have to rely on at each level of access. Your ability to demonstrate your competence and integrity, and in particular your ability to explain your research project clearly and concisely, will be critical. Alongside, the gatekeeper can also play an important role: creating awareness of your research, adding credibility by her or his intervention and introducing you and your research project to the relevant people.

Even where you are not seeking to access participants in an organisation or group, you will still need to demonstrate competence and integrity. Here your role as an external researcher may prove beneficial as participants are usually willing to accept an external researcher as objective and without a covert agenda.

Access issues as an internal researcher or participant researcher

As an organisational employee or group member you are likely to undertake research in your own group or organisation as an **internal researcher** or a **participant researcher**. Even in this role, you may face problems negotiating physical or continuing access and still need to



Box 6.3 Focus on student research

The impact of a researcher's organisational status

David recalls a case of mistaken identity. His research involved gaining access to several employers' and trade union organisations. Having gained access to the regional office of one such organisation, David read and noted various organisational documents kept there over a period of a few days. During the first day David was located in a large, comfortable room and frequently brought refreshments by the caretaker of the building.

This appeared to David to be very kind treatment. However, David did not know that a rumour had spread among some staff that he was from 'head office' and was there to 'monitor' in some way the work of the office. On attending the second day, David was met by the caretaker and taken to a small, plain room and no more refreshments appeared for the duration of the research visit. The rumour had been corrected!

Of course, this example of the effect of the researcher's (lack of) organisational status is most unfair on the large number of people who treat those who undertake research within their organisation very well in full knowledge of their status. However, it illustrates the way in which some people may react to perceptions about status.

obtain formal approval to undertake research from your organisation or group. As an internal researcher, potential participants may be suspicious about why you are undertaking your research project and the data collected will be used. Their views about the part of the organisation for which you work and your status may also affect whether you gain cognitive access. Such problems may be exacerbated if you are given a project to research, perhaps by your line manager or mentor, where others are aware that this is an issue about which management would like to implement change. This is particularly likely where resulting change is perceived as being harmful to potential participants. It may also suggest ethical concerns (Section 6.6).

6.4 Internet-mediated access

Internet-mediated access became the norm for much research during the Covid-19 pandemic, both for collecting primary and searching and locating secondary data. However, it still can be challenging to access to participants online who are suitable for your research and who match the characteristics of your intended sample (Sections 7.2 and 7.3). Similarly, it can be difficult to locate suitable secondary data (Section 8.4); both potentially leading to data quality issues.

Quantitative and qualitative data can be collected using the Internet. Online questionnaires can be accessed through a hyperlink displayed in an email or on a web page (Section 11.5). Experimental data may be collected online (Box 6.4). Internet-mediated observation can be conducted, using, for example, an online ethnographic research strategy (Section 9.5). Interviews or discussion groups may also take place online. These may be text based using SMS messaging applications, social networks or emails. They may also be conducted using telecommunication applications, such as Skype™ and Zoom™, to overcome the impersonal nature of a text-based Internet interview (Section 10.10). The Internet also provides access, through gateways and archives, to existing data sets that are available for secondary analysis (Section 8.2).

Online communities have generated extremely large amounts of material, especially qualitative but also quantitative, which subject to permission is often accessible to researchers.



Box 6.4 Focus on management research

Gaining access

Sara Althammer and colleagues (Althammer et al. 2021) conducted an online experiment over three weeks using a self-training intervention to research whether mindfulness interventions promoted work-life balance.

To gain access to potential participants for their experiment, the researchers used a range of different strategies. These included advertising flyers, professional email list servers, a snowball sampling approach

and asking their professional and social contacts. For each they promoted their research as a scientific project that offered a free three-week training intervention using mindfulness to detach from work and enhance work-life balance. Potential participants were asked to sign up online and subsequently complete a daily questionnaire. In total, 379 people signed up online to take part in the research, 99 subsequently not completing any of the daily questionnaires used to collect the data. A further 93 completed fewer than three of these questionnaires and were also excluded, the remaining participants completing questionnaires for an average of 9.46 days.

Based on their findings, the authors concluded that a brief mindfulness self-training intervention could foster detachment, reduce work-life conflict and improve satisfaction with work-life balance.

As these communities organise around an interest or a particular product, service, place or lifestyle, their forums and bulletin (message) boards can be used to post messages and create a discussion over time among members. Groups' email lists can, with permission, be used to start conversations. Linked web pages provide online community resources organised by interest, such as for consumer-to-consumer discussion. **Blogs** (web logs) and to a lesser extent tweets provide a public online journal or diary. Numerous bloggers comment on political events, often from the perspective of their political beliefs. Others comment on their shopping experiences and offer consumer advice or on their travel experiences (Jiang et al. 2021). Many blogs and bulletin boards are organised through content management systems, although these can be accessed through specialised blog search engines (Kozinets 2020).

Determining the type of access

Internet-mediated access is subject to the same issues that affect traditional access. While the Internet, and more specifically the use of web links, messaging apps, email, social networks, webcam and web conferencing, may facilitate communication between you and your participants; the most suitable way to conduct your research and negotiate access will depend on your research question and objectives. In some circumstances you may conclude that it is more effective to gain physical rather than virtual access using associated methods (Box 6.5).



Box 6.5 **Focus on student research**

Physical or virtual access and methods?

Sab had a keen interest in IT and thought that he would conduct his research using Internet-mediated access and data-collection methods. His research focused on the ways in which senior managers influence board-level strategic decision-making. His interest in this topic had developed after a fortuitous conversation with a senior personnel policy manager who worked for a large organisation, who had explained how in some cases strategy formation was influenced by promoting incremental changes rather than trying to bring about a radical change in one movement. This idea interested Sab and he formulated a research project to explore it in a range of organisational contexts. However, the more he thought about it and discussed it with his project tutor the more he realised that he would have to research it using traditional methods.

After negotiating physical access to interview six senior managers who worked in different functional areas in different organisations, he conducted a face-to-face in-depth, exploratory interview with each one. While

conducting these interviews he realised that the value and depth of the data he collected would have been much less if he had tried to conduct these online. His questioning was shaped by the data each participant shared with him during the interview. Because of the sensitive nature of the topic, most of the interviews took the form of discussions, allowing Sab to clarify points and ask for illustrative examples. As each interview progressed, he found that some of his participants were willing to show him quite sensitive documents in the privacy of the interview room (which was the manager's own office). He found that rapport and trust were vital to the conduct of each interview. He also found that conducting an interview at the organisation helped to focus his mind and enhance his understanding of the organisational context. This in turn helped him to make sense of the data his participants shared with him.

Sab concluded that first negotiating physical access and then developing cognitive access on a person-to-person basis at the start of each interview had been the most appropriate strategy to adopt and also the most effective. However, as he had met with each participant and established rapport and trust, he asked each one if he would be able to email any further questions for clarification. Some agreed but others said that they would prefer to undertake this either by telephone or another face-to-face discussion.

Where you decide to use Internet-mediated techniques, you are likely to need to negotiate virtual access and obtain permission from a broker or gatekeeper to gain access to a sample of organisational members (Box 6.6). Subsequently, you could advertise your research by a post or use an email list to invite potential respondents and including a hyperlink to your questionnaire (Section 11.5). Here you will need to ensure that your intended participants are aware of your research, its purpose, how it will be used, its nature and what will be required if they decide to participate in it. Their decision will be influenced by how well you explain the purpose, use and nature of your research and the requirements of taking part. This highlights how gaining access to an organisation and intended participants within it may involve a hybrid strategy. Such hybrid access strategies may be valuable where you wish to:

- achieve multi-organisation access and need to negotiate access to intended participants within several organisations;
- negotiate continuing access and meet with your organisational broker or gatekeeper and intended participants to develop rapport and demonstrate your competence and establish trust to achieve this.

Where you plan to conduct your research with individuals (individual person access or elite person access) online, you will need to identify an appropriate sample and then to negotiate virtual and cognitive access with these intended participants. The ability to



Box 6.6 Focus on student research

Where topic and strategy determined type of access

Elina's research focused on consumers' purchasing decisions. She was interested in assessing the relative importance of information obtained from online shopping sites and from high street shops in informing purchasing decisions for different product categories. These categories covered all of the products purchased by her age group, such as people on her marketing course.

Elina had formulated a mixed methods research design. She had designed a web questionnaire that asked respondents to identify actual recent purchasing decisions related to the categories in which she was interested. For each of these, where applicable, she asked questions about the product, the sources of information used to inform the purchase decision and the way in which these sources determined the purchasing decision. Following ethical approval from her university, she asked the course leader if they would send a message using the university's virtual learning

environment to each person on her course asking for their help and containing a hyperlink to the questionnaire. The questionnaire included a question asking each respondent if they were willing to help further by completing an electronic diary. Those who answered yes were asked to provide their email address so Elina could send them the diary.

Elina emailed the template of the electronic diary to all those willing to help further. She had designed this to allow respondents to record purchasing decisions related to her list of product categories, the sources of information used to inform these purchases and the way in which these sources determined the decision. Respondents returned the diary as an email attachment.

Elina was aware that her request to maintain an electronic diary of influences on purchasing decisions would sensitise respondents to their use of different information sources, so had distributed the questionnaire first. This she felt would help her judge the extent the participant had been sensitised as well as about the relative impact of these different sources.

Her use of an Internet-mediated access strategy proved successful in gaining access to both questionnaire respondents and a group of people who would keep a diary.

identify your sample will be a key determinant of the feasibility of this approach. If you are unable to find an appropriate sample yourself (Section 6.5), websites such as ‘Call for Participants’ may be helpful. These allow researchers including students to advertise surveys, interviews and other research studies to potential participants worldwide free of charge (Call for Participants 2021). However, you will need to establish whether using this or a similar online platform can provide access to appropriate participants.

6.5 Strategies to gain access

We now consider strategies that can be used in combination to gain access. Invariably, their precise use will depend on will depend on the nature of your research design (Chapter 5), data-collection methods (Chapters 8–11) and the characteristics of the access you require (Figure 6.1). Their use will therefore need to take into account the type, nature and level of access required. Table 6.1 summarises a range of access strategies and their relative focus on these characteristics.

Ensuring familiarity before making contact

Before attempting to gain physical access, it is essential that you familiarise yourself fully with the characteristics of the organisation, group or, for elite interviews, the individual. The knowledge you gain will enable you to signal to the gatekeeper that you have thought

Table 6.1 Access strategies and their focus on different characteristics

Strategy	Access characteristic		
	Type	Nature	Level
Ensuring familiarity before making contact	✓	✓✓	✓
Allowing sufficient time	✓✓	✓✓	✓✓
Using existing contacts and developing new ones	✓	✓✓	✓
Providing a clear account of the purpose of the research and type and level of access required	✓	✓	✓✓
Overcoming concerns	✓	✓	✓✓
Identifying possible benefits of participating	✓	✓✓	✓
Using suitable language	✓✓	✓✓	✓✓
Facilitating replies	✓✓	✓✓	✓✓
Developing access incrementally	✓	✓	✓✓
Establishing researcher credibility	✓	✓	✓✓

✓✓ = more focussed, ✓✓ = less focussed