GAINING ACCESS FOR RESEARCH

Reflections from Experience

Fevzi Okumus

University of Central Florida, USA

Levent Altinay

Oxford Brookes University, UK

Angela Roper

University of Surrey, UK

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OKUMUS, ALTINAY AND ROPER

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Fevzi Okumus

University of Central Florida

Rosen College of Hospitality Management

Orlando FL 32819 US

Tel: +407 903 8177

Fax: +407 903 8105

Email <fokumus@mail.ucf.edu>

Abstract This paper reflects on the experiences of facilitating and maintaining qualitative research access into a sample of international hotel groups. The existing research methodology literature tends to simplify the access process by explaining it through a number of stages. The fieldwork experience of the authors suggests that the propositions stated in literature are partly relevant; however, there are further critical issues that need to be considered by researchers and their academic institutions. Particularly, researchers should be better trained not only in developing relevant skills to carry out qualitative case studies but also dealing with the complexities of facilitating and maintaining access into large organizations. **Keywords:** case study, qualitative, research and access.

Fevzi Okumus is Associate Professor at the University of Central Florida

<fokumus@mail.ucf.edu>. His research areas include strategic management, international

hotel groups, qualitative research, and crisis management. **Levent Altinay** is a Senior

Lecturer at Oxford Brookes University. His research areas include strategic management and

the internationalization of hospitality firms and case study research. **Angela Roper** is Savoy

Educational Trust Senior Lecturer in the School of Management (University of Surrey). Her

research areas include strategic management, the internationalization of hospitality firms and hospitality marketing.

INTRODUCTION

One of the many problems facing researchers aiming to carry out in-depth qualitative case study research into organizations is the issue of gaining access, since it is often the case that a considerable amount of time is spent on this task (Patton, 2002; Shenton and Hayter 2004). Entering into organizations can be even more difficult if the research focuses on a sensitive topic. For example, Lee states that “fieldworkers are the kinds of people who can put up with constant and dedicated hard work, loneliness, powerlessness and confusion, and, quite possibly, some suffering at the hands of those being studied” (1993: 120). However, the literature does not cover this issue in much depth (Feldman, Bell and Berger 2003) and as stated by Gummesson (2000) the hurdles related to gaining access are often neglected or seen as merely a tactical issue. In addition, most previous studies related to this area are written by well-seasoned scholars such as Buchanan, Boddy and McCalman (1988), Burgess (1984) and Gummesson (2000) who provide a list of suggestions most of which are not always appropriate for every situation and for academics at different stages in their careers.

In particular, little has been written on this area in the tourism field, as most scholars do not seem to disseminate their experiences of gaining access when referring to how they collected qualitative case study data. While the tourism industry cannot be described as unique, there are certain characteristics such as the interdependence of different sectors, the generally small scale of many operators, the fragmentation of markets and the spatial separation of origins and destinations (Pearce 1992) which make the task of facilitating and maintaining entry into tourism organizations more complex. Given this situation, the paper reflects on the experiences of the authors in facilitating and maintaining access into a sample of international hotel groups for the purposes of two in-depth qualitative research projects. The organizations investigated are large, international, complex, for-profit enterprises which have grown through horizontal and vertical integration. However, some of the issues still hold true where case studies might be smaller and/or in non-profit organizations.

FACILITATING ACCESS FOR CASE STUDY RESEARCH

Empirical data for case studies can be collected from both in- and out-side organizations. Both ways are seen as complementary but each can have advantages over the other in certain situations (Litteljohn and Roper 1999). However, in some cases empirical data need to be collected from inside participant organizations by using qualitative data collection methods and often for a relatively long period of time. This is because, as stated by Bryman (1988), “inside” or “first-person” accounts can provide a real picture of an organization’s quirkiness and messiness. Laurila (1997) further notes that there is very limited evidence about what and how managers and organizations actually do things and in order to gain this type of data, researchers therefore need to rely on observation periods and interviews with relevant managers and employees.

Issues related to access vary to a considerable extent with the kind of case being investigated. In large for-profit enterprises, it may be harder, as today’s managers value the cost of their time very (please delete) highly and questionnaires are likely to be much more feasible for them than loosely structured interviews and observations (Easterby-Smith, Thorpe and Lowe 2003). Therefore, gaining access should not be taken as a simple activity as it “involves some combination of strategic planning, hard work, and dumb luck” (Van Maanen and Kolb 1985:11). Some academics seem to be luckier than others in this process. For example, Buchanan et al describe how they facilitated access:

Over a lunch in a real ale bar in Glasgow, a friend made a casual enquiry about our research. On discovering our interest he suggested that we study his own company, which was based in an office block on the other side of the street, and which was developing a large (by 1980 standards) word-processing system. We then discussed what the company might be prepared to let us do, and the research design was settled over a mixed grill and two pints of beer (1988:54).

On the other hand, there are continual reports of facing major difficulties in this endeavor. Organizations are dynamic and complex places and outsiders are not always

welcome into organizations, particularly those asking what may be perceived as sensitive and awkward questions about firms and managerial actions. They may be skeptical about the role of outsiders and therefore may not value academic studies (Laurila 1997). Coleman (1996) notes that organizations deny access because academics fail to provide answers about what, how and why they will carry out a specific study and whether this study will be any value to the managers themselves and also to the company.

Laurila (1997) identifies three types of access. The first one is formal access which refers to achieving an agreement between the organization and the researcher on specific terms including what, when and how the researcher will collect empirical data from the organization and in return what s/he will provide. The second one is personal access which means that the researcher is getting to know relevant executives, managers and individuals. The third one is fostering individual rapport which refers to developing a good understanding and collaboration between managers and the researcher. Similarly, Gummesson (2000) also identifies three different access types: physical, continued, and mental. Physical access means the ability of getting close to the object of the study. Continued access refers to maintaining an ongoing physical access to the research setting. Finally, mental access refers to being able to understand what is happening and why in the investigated settings.

Combining the above types, Buchanan et al (1988) propose a four-stage access model: getting in, getting on, getting out and getting back. This model is often referred to in the methodology literature (Lee 1993; Robson 2002). For the “getting in” stage, researchers are expected to be clear about their objectives, time and resource requirements. It is advised that existing contacts are used; that respondents’ reservations with respect to time and confidentiality are dealt with positively, that non-threatening language is used when explaining the nature and purpose of the study, and that a final executive report should be offered (Buchanan et al 1988).

Once access has been gained, it then becomes necessary to renegotiate entry into the actual lives of employees and managers. It is advised to have basic interpersonal skills and procedures such as a good appearance, verbal and nonverbal communication and responding in a non-evaluative and non-partisan manner. The researcher's personality, interpersonal skills and particularly interviewing skills can play an important role at this stage (Burgess 1984). The best strategy for getting out is agreeing on a deadline for the closure of the data collection process. It is also essential that the process of withdrawal needs to be managed to maintain the option of returning for further fieldwork (Buchanan et al 1988).

In the literature, two types of people in subject organizations are identified: gatekeepers and informants (Burgess 1984; Gummesson 2000). Gatekeepers are those who provide and facilitate access for the researcher. Buchanan et al state that it all depends on the goodwill of gatekeepers, which "creates risks that are beyond the control of the researcher and which are difficult to predict or avoid" (1988: 56). Gummesson (2000) notes that for political and personal reasons, gatekeepers can stop the access process into some parts of the sample organization(s) and being introduced to key informants who can provide valuable information. For example, Cole (2004) describes in her longitudinal study in eastern Indonesia how the power relations between her and the gatekeeper seesawed as he introduced her to some people before others and made some meetings much easier than others. Lee (1993) notes that the gatekeeper may offer access but only if the researcher agrees to study some aspect of the topic and produces a report for the gatekeeper's use. Researchers are usually in a weak position when seeking access "because they can deploy few bargaining resources beyond their academic respectability and the appeals they are able to make to the rhetoric of science" (Lee 1993:127).

Informants are those who can provide information about the investigated topic. Laurila (1997) categorizes them into four groupings: survivors, disbelievers, cautious analyzers and candid analyzers. The latter talk about the investigated area openly and provide

very detailed information. Cautious analyzers talk about simple issues openly but do not provide sufficient information on the investigated area. Survivors provide basic information reluctantly. Finally, disbelievers only talk about general issues and do not provide any useful information.

Researchers may have different roles in the process of gaining and maintaining access. They could be an analyst, member of a project, consultant, employee, change agent and external board member (Gummesson 2000). They can hold one or more of these roles depending upon the situation. However, there are potential difficulties associated with these roles. For instance, it may not be possible to possess all of the appropriate interpersonal and professional skills. Researchers may also disrupt and/or impact on working practices and may threaten employees in their normal working environment which may then have ethical implications.

The Two Research Studies and Three Participant Organizations

Access was sought for two research projects. The first project aimed to investigate and evaluate the implementation processes of strategic decisions in international hotel groups (Okumus 1999). Empirical data was collected from two international hotel groups (referred to hereafter as BritCo and GlobalCo). The implementation of a centralized yield management initiative was investigated in BritCo via over 30 semi-structured interviews, observations and document analysis and the first author of this paper spent over one year in the company visiting many hotel units and head office in the United Kingdom. In GlobalCo, the implementation process of a 'key client management' initiative was chosen as an appropriate case. The process was investigated over a 15-month time span in six countries via over 70 semi-structured interviews, participant and non-participant observations and document analysis.

The second project investigated the international expansion of a single hotel group (referred to as BrewerCo) (Altinay 2001). The data collection methods chosen for the study

were semi structured in-depth interviews, observation and complementary documentary analysis, all of which were considered to be appropriate strategies to obtain in-depth context specific information about the subject area. Over 45 semi-structured in-depth interviews were conducted with relevant organizational members in a 15-month time span in eight countries.

Choosing Data Collection Methods

The authors were often questioned about why the collection of quantitative data was not considered and why a structured survey was not used. However, it was apparent for each project that the choice of qualitative data collection methods was not a free choice; it was the most appropriate approach to achieve the intended objectives. Prior to the fieldwork, the relevant literature was reviewed in order to gain a deeper understanding of the relevant areas and concepts. For example, concerning the first project the literature review indicated that strategy implementation had to be investigated at different management levels in potential participant organizations by using qualitative data collection methods, perhaps longitudinally (Okumus and Roper 1998). The second project necessitated theory-generating approaches. Zhao and Olsen (1997) stated that literature about the ‘globalization’ of tourism organizations was still in an embryonic stage, and, these authors identified a need to explore what events in the business environment are factored into expansion decisions by multinationals to enter existing and/or new markets. Therefore, this advocated the use of qualitative data collection methods:

As a strategy, qualitative inquiry can generate theory out of research, should place emphasis on understanding the world from the perspective of its participants, and should view social life as being the result of interaction and interpretations (Phillimore and Goodson 2004:4)

The information required from the participant companies was anticipated to be complex and idiosyncratic to the firms. Thus, using standardized data collection methods would have been too rigid for the type of information sought for both projects and they would

not allow informal probing which is necessary to capture the “richness” of required data. It was therefore believed that the methods used would provide flexibility and adaptability and enable the enquiries to be tailored to pursue interesting responses and to specifically investigate change management issues in the first project and expansion strategies in the second project. In short, using the case study strategy and collecting qualitative data very much depended on the research topic chosen and objectives developed by the authors of this paper.

However, choosing qualitative data collection methods meant more time and resources were needed in the data collection process. In addition, it was realized that a detailed project design might not be very viable. For each project, sensitive and confidential data had to be collected from participant organizations, which required in-depth and long term access into hotel groups. Both projects were sponsored with a three-year grant, and just negotiating access into each participant company took four to six months and collecting data from each company lasted between 12 and 18 months. Because of the long time between gaining entry and completing the data collection process, the authors incurred additional and unplanned for expenses. In the meantime, while they were trying to gain access into their potential participant organizations, other researchers on similar grants had already collected and started analyzing their data. This was because they had tended to follow a more quantitative research strategy, often utilizing the survey method. Some of them had not even needed to facilitate access into any organization. To sum up, choosing qualitative data collection methods required the authors to spend more time on gaining access and collecting data which, in turn had implications for the overall plan of work and the necessary resources required.

Sampling

For both projects, rather than following rigid and well-justified sampling strategies, a

non-probability sampling method was employed. There were about 40 companies worldwide which can be defined as “international hotel groups” (Bailey 2001). Therefore, for both projects, considering the resource and time implications it was preferable that head offices of the sample hotel groups had to be either in the UK or Europe. It was also decided that the official language of these companies should be English so that the authors could communicate with relevant informants and look at relevant company documents without experiencing any language barriers.

For the first study, eight companies were approached by sending them a letter which explained the project background, its aims and its potential benefits. The issues of confidentiality, resource and time requirements were also explained. Follow-up phone calls were made and further explanations were provided. Letters or phone calls were received from five companies stating that they were unable to participate in the project since they did not have any relevant change cases, the existing cases were too sensitive or the company was going through major structural changes therefore they would not be able to allow any outsider into their company.

Eventually, after four months of hard work and intensive formal and informal communication, three hotel groups showed interest in the project. One of them later withdrew without giving any reason. Initial access was gained first into BritCo through the support and guidance of a leading Professor in the field and a Research Fellow who was working for the company. However, in an e-mail, the Professor reminded the first author of this paper that “your findings must provide added value to [BritCo]”. Through the guidance of the Research Fellow, relevant parties were approached and briefed about the project and its aims. Finally, the executives of this company agreed to participate in and support the study in return for receiving a detailed written report. The deployment of a yield management strategy was selected as the focus of the investigation. Overall, it took more than four months to actually gain permission to begin collecting empirical data in this group.

While collecting the data from BritCo, contacts were made with other international hotel groups for access. Access was gained into GlobalCo through the Senior Vice President of Sales of the company. He had completed his Masters of Business Administration degree at the authors' University and was later appointed as a Visiting Fellow. He and some other executives were interested in the project but were also concerned about the confidentiality and commitment of company executives in terms of time and resources. Further to a satisfactory compromise on these specific issues, the deployment of a key client management strategy was identified for investigation. For the second study, initial access into BrewerCo was gained through a Professor from the University who had good links with executives of this group. Although he agreed to support the project, it took several months to formalize the agreement. Similar to the other case study companies, formal and informal communications took place before the second author of this paper could enter the organization for data collection purposes.

The "gatekeepers" from the participating companies identified potential informants to approach and interview. Some of the suggested informants agreed to be interviewed but provided very little information. In Laurila's (1997) terms, they acted as "survivors" and "disbelievers". Some informants declined to be interviewed without any genuine reason and therefore, perhaps an additional category can be added to Laurila's groupings entitled "rejecters". On the other hand, many of the suggested informants agreed to be interviewed. They did not only provide detailed information but also suggested further potential interviewees, relevant documents to study and appropriate meetings to attend.

Through the gatekeepers' and those candid analyzers' support and guidance new interviewees were found. This type of sampling is often described in the literature as theoretical sampling, purposive sampling or snowball sampling (Hemmington 1999; Robson 2002). However, similar to Miller's (1990) arguments, regardless of the theoretical justification concerning the selection of participant companies and the sampling of

informants, the feeling was that the use of the word “sample” for both projects was perhaps misleading. The group of organizations for both projects was not selected by any rigorous procedures. In fact, the companies selected themselves; or rather some of their senior executives and managers did by agreeing to support each project. In terms of interviews, despite the authors’ and the gatekeepers’ attempts to reach and interview all key informants at different management levels and locations, in some cases this was not possible. Only those who were willing to take part in the research could be interviewed. This suggests that it is not always possible to systemically select companies and informants but the researcher is the one who is selected by organizations. Inevitably, it is the research project, the researcher’s personality, skills and the internal dynamics of the participant organization, which all influence gaining and maintaining research access.

Planning or Dumb Luck

Following previous studies, the participant organizations were provided clear research plans and participant briefing information. When initial meetings were held with some executives (the “warm contacts” or “gatekeepers”), it was clear that prior preparations and planning paid off. The authors were asked about aims of their projects, how the company and the respondents could help them, how the project could help the company and what type of support and resources were required from the company. The briefing information and verbal discussions provided answers to these sorts of questions, thereby creating a positive impression. The latter was interpreted as a sign of “professionalism” by the existing contacts and they subsequently became confident about the involvement of their companies in the proposed projects.

However, these preparation activities were not the only factors that eased the process. There was also a “combination of planning and dumb luck” (Van Maanen and Kolb 1985:11). For example, researchers from other institutions were also working on similar

research topics. They had sent the participant hotel groups letters and proposed research plans and held meetings with their organization members. However, their requests for entry were declined because the companies were not interested in devoting time to their projects. They were told that the companies had analysts or consultants who could undertake such investigations for them. It is clear that no matter how good the preparation, there are variables associated with gaining entry which are out of the researchers' control. In these two research projects, Visiting and Research Fellows of the University acted not only as "motivated insiders" but also as important catalysts between the academic and industrial worlds.

Timing is also important. In the case of the first project, BritCo was taken over one year before the data collection process began and the new owners were supportive of the yield management initiative. If this company was approached two to three months earlier or indeed several months later, access would not have been granted. Likewise, in the final stage of the data collection process, GlobalCo was acquired and as a result many senior executives and managers feared that their jobs might be lost. As a consequence, data collection was suspended due to the high level of organizational uncertainty. Eventually radical changes did take place across the company and those executives who had acted as gatekeepers were promoted and data collection then resumed. However, several months later these executives left the company, a reflection of the dynamic nature of senior positions in large firms.

The Role and Importance of Gatekeepers

Entry into the participant organizations was facilitated through the help and guidance of contacts and academic colleagues. In all cases, these people and their colleagues acted as gatekeepers functioning similar to a "hinge" between the authors and the organizations. Gatekeepers introduced them to the relevant people and created an awareness of the project and the authors. As one of the gatekeepers told one of the authors "you need to promote yourself and the project to the other organizational members". Such an approach was thought

to contribute to gaining formal and personal access and fostering individual rapport.

Gummerson (2002) and Lee (1993) view the role of gatekeepers as people who monitor the activities of the researcher throughout the data collection process in order to ensure that the latter do not touch upon sensitive issues in organizations. The gatekeepers guided the authors in the identification of the most appropriate projects that could be evaluated and/or made suggestions as to the most suitable time to approach informants. At first sight, these activities can be seen as a threat to the autonomy of the researchers and might arguably influence the data collection process. However, there was a need to balance the maintenance of access and potential bias. This does not mean to say that “gatekeepers” constitute barriers. Their activities as “controllers” should not overshadow their importance as facilitators. It was also apparent that the gatekeepers actually took some risk in terms of letting a stranger in who was going to ask some sensitive and perhaps irrelevant questions to many people at different management levels and functional areas. They were therefore risking their own reputation and status in the organization in “sponsoring” such a project.

In the case of gaining formal access, the gatekeepers stood out as a “point of reference”. Their support added credibility to the value of the projects and to the status of the authors. It is however worth mentioning that this cooperation depends a lot on how the gatekeeper is perceived in the organization. In all three cases, they were the senior decision-makers and were generally well known. A formal agreement was initially gained between the gatekeepers and the authors about what, when and how empirical data could be collected and a formal memorandum developed which introduced the project to other key people in the organization. These sanctioned documents positively influenced the perceptions of organizational members and gave them the assurance that the research was beneficial and unthreatening.

Such a formal approach was particularly important and helpful, as gaining respect from senior informants could be exceedingly difficult for the authors. Formality opened many

doors; although, formal access was not enough on its own to carry out the projects. There was a strong need for personal access and fostering individual rapport. Indeed, it was realized that access did not entirely depend on one person. The authors had to negotiate with many other members and build up further personal relationships with them.

Through the gatekeepers' guidance and lobbying in each company, other relevant parties were approached and informed about the project and thereby new gatekeepers were recruited. For example, in BritCo, the Yield Director, members of his team and several hotel managers genuinely supported the project. In GlobalCo, the Personal Assistants of the Senior Vice President of Sales, Regional Directors of Europe, America and Asia Pacific were all supportive. However, in several cases, certain managers had to act as a gatekeeper without any genuine desire to do so. This was because they had received a formal request from a senior executive and therefore they felt under obligation to let an outsider "in". A genuine trust and rapport needed to be built between the authors and these "disbelievers" and their employees, which was often a challenging task.

Building Rapport and Trust

Building a relationship and the creation of a cooperative environment is not established overnight. For example, despite all the documentation sent prior to arrival and telephone conversations, informants still wanted to hear about the project verbally and to question the authors face to face. In other words, a significant part of the relationship developed during numerous site visits to different parts of the participant organizations and a gradual "mutual evaluation" was established between the authors and organizational members so that both could assess whether there was room for a long and trustworthy partnership. In this respect, repeat visits to the companies' head offices, regional offices and hotel units played an influential role.

Despite this, organizational members were still sometimes suspicious. Comments were made such as: “Whose agent are you?” and “What does your detective work involve?” This was particularly the case when making visits to the operational level of the participant companies. Jokes and statements were often made about the authors such as: “He is the head office guy” and “He is here to check on us. Tell them that we are good”. These suspicions were understandable given the topics of the investigations which involved evaluating decisions made by individual actors. The latter’s propensity to protect themselves from perceived “blame” was therefore high. Doubts were eventually allayed by reiterating that the authors were carrying out an academic study rather than working on behalf of the company. This supports the arguments of Coleman (1996) who highlights the importance of addressing the concerns of organizational members to ease the process.

In the “getting in” stages of the access process, it was important that the authors had to be perceived as professional and “someone” worth spending time with. However, once personal access was achieved and individual rapport fostered, there was a need to shift away from formality to a “comfort zone”. The authors took the strategy of being humble and often stated to informants: “I am here to learn from your experience and knowledge”. Before starting fieldwork, relevant company documents, annual reports, press releases and other types of company specific information were collected and reviewed. This background information assisted the authors in proving to insiders the extent of their closeness to the organization and thus helped in the facilitation of communication. Such tactics not only gave comfort and confidence to organizational members but also released the feeling of anxiousness away from the authors.

Engaging in acceptance and trust strategies was imperative in order to conduct the investigation in a natural setting and being able to enter and exit the field on a regular basis. For example, there were instances in each company where some informants provided basic information during the interviews. After each interview, a thank you letter, fax or e-mail was

sent to each informant. Further to transcribing interview tapes and notes some informants were met during company visits or contacted again in order to solicit further questions. It was observed that these informants were often friendlier and more supportive than before and they provided additional information. Some of them even became “gatekeepers” to other parts of the organizations. This is interesting since Laurila’s (1996) groupings of informants such as disbelievers, survivors, cautious analyzers and candid analyzers is not static. Through their interpersonal skills and communications, the authors converted several disbelievers into candid analyzers and gatekeepers. However, during the early stages it was difficult to qualify one informant as a candid analyzer or disbeliever. This was because before making any early judgment, the authors needed to transcribe the interview notes and tapes and then have a clear understanding of the researched cases as well as internal dynamics of the participant organizations.

Understanding the Internal Dynamics of Participant Organizations

Contextual factors influenced the direction of both projects. For example, BritCo had a bureaucratic organizational structure and it was a known fact that its organizational culture was not very receptive to new ideas and changes. However, following an ownership change, radical structural changes took place. New appointments were made to the senior positions such as the Chief Executive Officer and Marketing, Brand and IT Directors. GlobalCo had a decentralized organizational structure. In particular, experienced, outgoing, dominant and outspoken hotel general managers who in fact symbolized the success of the hotel group. BrewerCo was a risk-averse bureaucratic company with a centralized organizational structure. All these contextual factors had a bearing on the data collection process.

In the case of the first company, a lack of trust of head office practices persisted at operational levels since the company had introduced radical structural changes resulting in redundancies. In the case of the other two companies, there was an ongoing power struggle

between different levels of the organizations. In GlobalCo, there was an ongoing conflict between the head office and unit level hotel properties. For example, one of the Hotel Managers described the relationship between themselves and the head office as “In the head office if they think they are in charge of the business but they are not. They should realize that they are the support for the individual units”.

In BrewerCo, the function responsible for the deployment of international expansion decisions was viewed with great suspicion, and it was particularly believed by the head office that this function was intrinsically in conflict with the corporate organization. On the other hand, one of the members of the international expansion function argued that they would always work for the interests of the company:

We are responsible for the international expansion. You cannot do business from head office. We are not in the company to screw it up. We are working for the right progression of the brands in different markets. Therefore, the company should benefit from the opportunity of having people who know the markets with opportunities.

These examples illustrate two important issues, namely the bureaucratic obstacles and the potentially conservative nature of organizational members in terms of providing company-related information. In BritCo and BrewerCo, even if the authors believed that they had gained and fostered personal access, the extent of access often shifted backwards towards the formal access and “getting in” stages (Buchanan et al 1988). Many times, formal letters needed to be written again and requests had to be chased to get into certain parts of these companies.

Maintaining access was also a challenging task. This was because the three companies were going through a transitional stage due to the integration of recent acquisitions and the relocation of corporate headquarters. Concerning GlobalCo, due to this company’s decentralized structure, orders and requests from the head office were not often received warmly at the operational hotel level. For example, while visiting a hotel unit in Frankfurt,

despite an appointment having been made, the general manager refused to meet the first author and asked “Why did they (the head office) send you here? I am busy and have no time.” The author kindly stated that he was a PhD researcher at an academic institution and he was not working for the hotel group and further noted: “As you are a very experienced general manager I would like to hear your views and experiences about the deployment of key client management practices at the unit level”. Further to hearing this, the general manager spent about an hour with the author answering all his questions and also explaining how successful they were at the unit level. Interestingly, similar situations were experienced later while visiting hotel units in London, Singapore and Istanbul.

Buchanan et al (1988) suggest that the best strategy for getting out from the participant organization is agreeing on a deadline for the closure. However, the experiences of the authors indicate that during the data collection process, unexpected delays and developments may persist and rigid plans may therefore be somewhat fruitless and exact closure dates unviable. For example, during the final phases of the data collection process, GlobalCo was acquired which resulted in further complexities in collecting the empirical data. Given these developments as well as ongoing changes and political conflicts in the organizations, the dilemma faced by the authors was that, on the one hand, access was gained to one group of organizational members but on the other “access ease” strategies needed to be implemented to a different set of informants.

While collecting data, there were also cases that informants grew curious about the views of others and would ask: “What do others think about this?” and “Tell me what you learned from others you talked to”. It was vital that the authors avoided giving answers to these questions. There were a number of reasons for this: (1) the ethical implications in terms of confidentiality and (2) the requirement to disguise the names of the informants while sharing the information. In addition, access down the line might have been further denied as the authors would have been perceived more as an “agent” or “spy” and/or biased towards the

views of just one group.

More importantly, given the sensitivity of the organizational issues and political conflicts within the organizations, informants were concerned about the confidentiality of the collected data. Different strategies were followed in order to minimize the impacts of political turmoil on the research process. Firstly, the data collection process was accelerated. Secondly, confidentiality was guaranteed and the anonymity of informants assured. Thirdly, friendly and enthusiastic dialogue was maintained with both established executives, as well as relative newcomers. Following Lee's (1993) recommendations, simple "friendliness" and openness to questions and enquiries aided in securing full cooperation. In addition, minor "favors" were undertaken. For example, in BritCo before and after a workshop training session the first author helped the yield team in the arrangement of the workshop room and the distribution of relevant materials. In addition, some recent practical articles and books on yield management were provided to the Yield Director and members of his team.

In GlobalCo, during three weeks of participant observation at the European Regional Sales office in London, the first author worked as a team member and compiled several internal confidential reports on sales performance of regional offices in the company. Although not planned for, the members of the sales office appreciated this help. This provided further and deeper information about the investigated issues as well as assisted in gaining access to other regional offices in the United States of America and Asia. Such strategies and experiences illustrate the importance of maintaining positive relationships with existing informants and expanding one's network in an organization. In addition, they point to the fact that gatekeepers should not be the only people relied upon. It further illustrates not only the dynamic nature of the industry in which large organizations operate but also the complex environment in which case study research is carried out.

The above discussion implies that even when formal and physical access is gained, establishing and maintaining mental access is challenging. It also points to the fact that the

four stage access model proposed by Buchanan et al (1988) appears to take a rather simplistic view. According to the authors' experience, the proposed stages overlapped and it was difficult to separate one from the other. They often found themselves negotiating and re-negotiating access and achieving an agreement with one or several senior managers did not mean access into the entire company. Moreover, even when key executives agreed to help, this did not necessarily guarantee that essential data could be collected. In addition to having good interpersonal, interview and observation skills, they needed to have a clear understanding of the hotel groups' internal dynamics, politics and cultures of different departments and management levels.

Disseminating the Findings and Other Ethical Issues

There were some disadvantages with working closely with the gatekeepers. For example, soon after the data collection started in each company, the gatekeepers were keen to learn about the findings. On the other hand, some considerable time was needed to transcribe all notes and analyze fully the findings. In addition, before developing a fuller understanding of the investigated issues, it was not sensible to disseminate incomplete findings. When the data collection process was finalized, company executives, particularly the gatekeepers, requested a written report and oral presentation summarizing the main findings, conclusions and recommendations from the study. Preparing and producing such reports was time consuming, a task previously not envisaged. In addition, presenting these reports in a professional and business-like format and style required a new set of skills.

Finally, in line with Lee's (1993) arguments, in all three cases the gatekeepers had expectations that these reports would elicit beneficial findings for their organization. This was a difficult situation because sensitive issues were being discussed related to managerial and organizational competencies and very often managers did not like the things being concluded. This activity resembled more the characteristics of Action Research, and the

University's rules and regulations on research ethics clearly indicated that research studies should not have any negative impact on participant organizations and their members. In short, it was necessary to consider very carefully what to include in such reports and to be fully aware of the implications of these.

While sharing the findings with a wider audience during conferences and in-company presentations the authors had the chance to explicitly talk things through. This was particularly influential because during the research process, the authors inevitably imposed their own categories of meaning on observed events. Only when they presented their findings to the different parties, could the misinterpretations and misperceptions be corrected. This built confidence in the findings and increased the validity and reliability of the data. However, it raised a number of questions with regard to confidentiality and research ethics. A dilemma was faced as the projects progressed and they neared completion. Finding a way to analyze the findings and encourage cooperation while preserving confidentiality became a real challenge. Cooperating with the gatekeepers and promising organizational members the dissemination of the findings was influential in the negotiation process, in terms of them agreeing to participate in, and support, the projects. However, when the reports were written and in-house presentations held to share the findings, it was difficult to hide the informants' identity. For instance, even if they were disguised, informants could identify each other by looking at the informants' views and their standpoints with regard to different issues. In addition, during the presentations at different conferences, the audience could easily identify the companies by disclosing findings related to strategy, structure and culture. This was because there are only a few international hotel companies operating in the industry.

It came to light that fieldworkers need to manage the dilemmas they face, by bringing the privacy and ethics requirements into alignment with strategies employed to maintain access and data analysis. This mostly involves "extra sensitivity" in terms of being able to get the desired balance between dissemination and the maintenance of anonymity. The

experience of the authors indicated that the chosen approach should take into account the specifics of the organization as a research setting. Following Pettigrew's (1990) recommendation, it was felt that the participant organizations could not be viewed as laboratories, and different data collection methods could not be freely utilized without agreement from the organizations and without considering ethical implications. The crucial learning point was that although the experience in these companies was immensely valuable, the authors did not possess all the necessary skills, knowledge and experience to act as a company analyst, member of a project, consultant, employee, change agent and/or external Board member.

CONCLUSION

This article aimed to disseminate the personal experience of the authors in gaining and maintaining access into three international tourism organizations for in-depth qualitative case study research. A number of conclusions can be drawn from the above discussions. According to Cohen (1998) the most significant and lasting contributions in the tourism field have been made by studies which employed qualitative research methodology. Xiao and Smith (*in press*) further note that the case study approach which often uses qualitative data collection methods has greatly contributed to tourism research and scholarship. However, the dominant paradigm in the tourism field is positivism which places high priority on methodological exactness and use of quantitative data collection methods (Riley and Love 2000; Walle 1997). On the other hand, qualitative research has not been perceived favorably in tourism and often blamed for missing the qualities of good science (Decrop 1999). One reason for this is perhaps that qualitative researchers often fail to disclose their data collection and analysis procedures in detail which in return results in confusion and suspicion among non-qualitative researchers and reviewers (Decrop 1999; Riley and Love 2000). This paper is perhaps one of the few studies in the field providing detailed description and discussions

about how in-depth qualitative data was collected from tourism organizations. Consistent with Riley and Love (2000) and Walle (1997), the data collection experience of the authors suggests that there are major differences between quantitative and qualitative research strategies in terms of research design, data collection and data analysis procedures. This suggests that tourism researchers need to be informed and educated about these major differences, in particular about the major challenges of gaining and maintaining access for qualitative case study research projects in tourism organizations.

In spite of the importance of facilitating and sustaining access, literature on this area continues to be vague and incomplete. It tends to simplify the process by explaining it through a number of stages and /or forwarding a number of skills required by researchers to exploit while negotiating access. This paper clearly demonstrates the interactions between researchers and the multiple parties in the process, and in so doing captures the dynamics and hurdles involved. It is important to underline that choosing a case study strategy and using qualitative data collection methods require that researchers spend considerable time on gaining access and collecting data. Planning and preparation is important but some luck is also essential. Tourism academics wanting to employ a similar approach need to have certain interpersonal and research skills and have a good understanding of the complexities and challenges of organizational and/or community settings.

The paper has both theoretical and practical implications. Theoretically, it enables a deeper understanding of the actual human dynamics of facilitating and maintaining research access into for-profit tourism organizations. These dynamics take place not only inside the organization, but outside in the field when researchers communicate with third parties to develop their aims, analyze their data and present their findings. The interactions both between the researchers and the other parties are particularly important in terms of developing a meeting of minds and making access possible. This paper advocates that human factors influence the accomplishment and maintenance of research access. Disregarding these

non-economic aspects of the practice means ignoring the real-world complexities of tourism research.

Obtaining evidence over a long period of time from large tourism organizations is not a straightforward process. It requires a remarkably high level of resources, activities and skills. The characteristics of many tourism for-profit firms make this even more challenging, for example, hostile takeovers, disasters and crises are common in the tourism industry. In addition, tourism organizations often experience high labor turnover and utilize traditional top-down organizational structures (Okumus 2004). As illustrated in the discussion above, the former could lead to problems in terms of maintaining committed gatekeepers and a network of willing participants whereas the latter requires support for the project from the top of the organization, subsequently requiring skills in conciliation. The dynamic events accompanying acquisitions and takeovers also test the resilience of researchers as they have to cope with anxious participants who may fear the lack of continuity of employment. In short, the nature of the dynamic business environment in which the company operates greatly influences the data collection process.

There can be no single method or piece of advice related to gaining and maintaining access for a long period of time. While it is important to be organized, self-motivated and persistent before and during the research, there are many external factors which are beyond the control of qualitative researchers. They should remain flexible and learn to develop contingency strategies (Feldman et al 2003). Access into tourism organizations can rarely be negotiated on a single occasion but will require regular negotiation and renegotiation at different stages and with different members of the participant organization. In addition, it will require the exploitation of a range of advanced communication and interpersonal skills. Developing such skills may take a long period of time and furthermore many researchers may not be comfortable and capable of using sophisticated interpersonal skills in the data collection process.

Tourism academics who particularly come from the positivist view may aspire to instigate a more structured and systematic way of conducting fieldwork by formulating precise objectives, designing a research plan and select data collection techniques before gaining entry into a company. Previous literature emphasizes the importance of planning in this process. However, the emerging questions are whether everything can be carried out according to plans and how much access difficulties influence the process. The experience of the authors suggests that one might need to take a flexible, unstructured and perhaps a “garbage can” approach which involves a great deal of complexity and ambiguity. Such an unstructured approach might, to a certain extent, contradict the usual research process. Even if researchers spend some time thinking, formulating and planning their research strategies and designs, many questions may remain vague and unanswered. Answers to the questions such as what data to collect, where to find it and which data collection methods to use, can be clarified in the research setting. It is therefore feasible trying to gain access into tourism organizations, even during the early proposal development stage for qualitative case studies. Given these points, universities and more specifically, tourism and hotel schools, might need to have a more flexible approach to resource allocation and the requirements of the registration of qualitative research projects.

The research process is a “dynamic game”, which involves different parties from different backgrounds. Getting other people involved is particularly important because this provides a multi-dimensional and rich insight into the investigated project. However, as discussed above tourism organizations are so fast moving and ever changing in terms of top managerial personnel. It is therefore recommended not to rely on only one gatekeeper but expand the number of gatekeepers, especially among middle and operational managers in different functional areas. This can assist in incorporating the critical views of these motivated insiders and balancing any potential research bias.

The authors of this paper enjoyed and greatly benefited from their “adventurous” research journeys. Although they suffered from many feelings of confusion and uncertainty, they learned how to cope with and adapt to the challenges they faced. Knowing that all researchers have questions on their minds for which they seek answers at the outset of their research, they are therefore impatient to find the answers and to reach early conclusions in order to get rid of the uncertainty. However, the experience of the authors suggests that it is important to live with this ambiguity and be patient throughout the research process. This cannot only assist researchers to improve their research skills but also develop their risk taking, exploration and intuitive skills.

The authors’ overall aim of sharing their access experiences has been to stimulate further debate and dissemination of others’ experiences in this area. In order to develop a better understanding about the difficulties and the challenges of gaining and maintaining access and carrying out qualitative research in tourism organizations, academics from different countries and cross-cultural backgrounds should share their research experiences. Further studies can explore how the interpersonal and communication skills of researchers influence the data collection process. In addition, to add to the discussion, it would be illuminating to hear about the experiences of those researchers who have gained and maintained access to small tourism firms, especially as the latter dominant the tourism industry. It is also worth particularly investigating why tourism organizations, both for-profit and non-profit, deny access. Finally, it would be interesting to look at whether the image and reputation of universities and tourism schools are important enablers or disablers for successfully gaining access.■

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