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The role of context in case study selection: An international business perspective

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Abstract

The extant methodological literature has challenged case selection in qualitative case study research for being arbitrary or relying too much on convenience logic. This paper aims to address parts of such criticism on the rigour of case selection through the presentation of a sampling framework that promotes contextualisation and thoroughness of sampling decisions in the study of international phenomena. This framework emerged from an inductive process following an actual case study project in international marketing and promotes the idea that context matters for sampling purposes, too. The proposed framework integrates methodological tools that complement the overarching principle of purposeful sampling and considers respective contextual challenges that the researchers encountered before and during fieldwork. It serves to highlight in an iterative fashion the role that context plays in the case selection process and the importance of contextualised sampling processes for qualitative case study research in international business.

Keywords: case study; context; contextualisation; qualitative research; sampling; direct observation

1. Introduction

The role of context and its implications for theorising has received increasing attention in various academic fields including strategic management (McKiernan, 2006), organisational behaviour (Johns, 2006), entrepreneurship (Zahra, 2007), and marketing (Arnould, Price and Moisio, 2006). More particularly, various scholars have initiated a timely dialogue on the meaningful incorporation of context in the study of international business (IB) phenomena (Michailova, 2011; Ghauri, 2004; Welch et al., 2011; Tsui, 2007). Relevant theoretical and methodological articles dedicated to context(ualisation) challenge the current status quo in IB, which has largely treated context as a measurable and exogenous variable, which hinders theorising. As a result, IB is replete with *proof*-driven (and not *understanding*-driven) studies that are characterised by having 'much of context assumed out' (Redding, 2005, p. 123). Instead, these authors, with whom we join, suggest that context is complex, dynamic and multi-dimensional, and most importantly, explicitly related to the methodological choices of researchers (Michailova, 2011). As Buchanan and Bryman (2007, p. 483) suggest, the "choice of methods is shaped not only by the research aims, norms of practice, epistemological concerns but also by a combination of organisational, historical, political, ethical, evidential and personally significant characteristics of the field of research".

One may assume that IB research suffers from an explicit treatment of context as it has mainly employed quantitative tools that capture context "as a set of interfering variables that need controlling" (Harvey and Myers, 1995, p. 17). Interestingly, while qualitative research is considered to be context-sensitive, a strong trend towards de-contextualisation has in fact prevailed in practice. Welch et al. (2011) observe that the rich context, which is the essence of qualitative case-study research, is often missing in IB accounts as case-study authors are still puzzled about contextualisation issues. We suggest that qualitative researchers may come to appreciate context by treating case sampling and contextualisation as a joint decision rather than as two separate tasks in case-study research. Such an approach renders case-study selection an emergent process captured in Ragin's (1992) process of casing, where the boundaries of the case are shaped by a dynamic array of contextual factors. Despite the potential of such a context-sensitive and emergent logic of sampling for IB, though, this has been largely under-appreciated

in case-study research, leading scholars to question whether respective IB studies can use the term case study (due to lack of contextualisation; Piekkari et al., 2009). These remarks are important because such criticism against IB case research is not a peripheral issue of concern but rather a challenge that reflects on the overall appreciation of qualitative case-study researches by the IB community (a research body which is arguably limited; Yang, Wang and Su, 2006).

Based on the above, we argue for a deeper consideration and incorporation of context in IB research and highlight its importance for case-study selection. In line with Alvesson and Sandberg (2011) and Bamberger and Pratt (2010), we seek to challenge the current status quo around the role of context in IB research and problematise for its importance. We approach context as a multi-dimensional array of phenomena, sites and events that have the potential to inform methodological choices and, more specifically, case-selection practices. We draw on various IB studies and our experience from the field and present an iterative process that we followed in order to integrate context in an international marketing study. The emergent framework highlights context learning and context-focused selection of case studies by employing pilot cases, direct observation, analysis of secondary data and the overarching principle of purposeful sampling as a means for dealing with the contextualisation challenges encountered before and during case fieldwork. Viewed in this light, our approach is linked to the central but neglected role of context in case selection in IB, the emergent nature of case selection that highlights the uniqueness of context for IB investigations, and the criticism that sampling processes attract in the overall qualitative research. To the best of our knowledge, there is a scarcity of studies that integrate diverse methodological tools and ideas as a way to tackle sampling challenges in IB case research (*cf.* Chau and Witcher, 2005; Halinen and Törnroos, 2005; Wilson and Woodside, 1999).

The paper's structure is as follows. Section 2 elaborates on the relevance of context in IB scholarship through several empirical and conceptual studies. Following that, section 3 puts forward a sampling framework that promotes contextualisation and thoroughness of sampling decisions in IB following an actual case-study project. The concluding sections highlight the importance of contextualised selection of case studies in IB research and clarify the contribution of the paper while suggesting further research steps.

2. The relevance of context for international business

In IB, most studies treat context as a monolithic, homogeneous construct based on a single dimension. There are, however, a few insightful (yet fragmented) qualitative studies that illustrate the role of context as a complex, multi-faceted element. For example, Geppert, Williams and Matten (2003), in their case-study research, illustrate how a variety of social and organisational contexts in home and host countries construct the options allowing subsidiaries to exercise strategic choice in the face of pressures from headquarters. Ferner (2000), in a similar case approach among British and German multinationals, showcased how cultural and organisational contexts help in exploring the deeper relationships between management control systems and power resources in MNEs. Prime, Obadia and Vida (2009), in their grounded theory study, stress the role of macro-economic or organisational contexts, concluding that diversity in these contexts has a consequent effect on how psychic distance is perceived by exporters. Ferner, Quintanilla and Varul (2001), in a multiple case-study approach, illustrate how the subtle interplay between home and host country national and institutional contexts affects international human resource management practices by MNEs, while Salk and Shenkar (2001) through a longitudinal approach explore diverse environmental and structural contexts to draw conclusions about the key role of national social identities in making sense of international joint ventures. Meyer and Tran (2006) through a single case study of a large multinational brewery across four countries delineate local idiosyncrasies across these countries, illustrating how these lend themselves to different market penetration and acquisition strategies in emerging economies. Lastly, Poulis, Yamin and Poulis (in press) through paradigmatic cases explain how a contextualised approach that focuses on the market and competitive contexts can more meaningfully assess the relative usefulness of ownership advantages for MNEs.

Several authors have also conceptually illustrated the role of context for IB. In reviewing the seminal work of Lyles and Salk (1996), Meyer (2007) illustrates the role of the national and the organisational context as crucially influential on processes of organisational learning. Zaheer and Zaheer (2006) call for a fresh approach to examining the role of trust across borders, a concept which has been routinely perceived as a universal construct (Muethel and Hoegl, 2011). These

authors argue for a context-embedded re-conceptualisation of international collaborations that more carefully considers the various natures, levels and degrees of trust across contexts. Last but not least, Yildiz and Fey (in press) revisit the liability of foreignness for MNEs by proposing how idiosyncratic institutional contexts engender varying needs for gaining legitimacy in transforming economies.

Several empirical and conceptual articles thus point out that the national, organisational, economic or competitive contexts analytically matter in IB and that an understanding of them has the potential to assist in a re-conceptualisation of key IB constructs. However, despite the multi-contextual approach that such papers often adopt, their focus is neither on providing tools that could methodologically assist future, context-driven IB researchers nor on explicating how contextual idiosyncrasies inform aspects of the research design such as sampling. Such a focus and explication, though, are increasingly important for IB for the following reasons.

First, there are multiple definitions and understandings of what context and contexualisation are (Cappeli and Sherer, 1991; George and Jones, 1997; Bamberger, 2008; Johns, 2006) that are not tailored to IB researchers' needs. They often reflect contexts (such as the national or the organisational context) which are relevant for IB research, but they also reflect specific conditions such as workplace arrangements which are mostly relevant for fields such as organisation studies and management (Bamberger, 2008).

Second, definitions of contextualisation (Rousseau and Fried, 2001; Zahra, 2007; Tsui, 2007) imply that contextualisation takes place at many stages of the research process. However, while these studies offer normative suggestions on how one can apply contextualisation across these stages, the norm in IB empirical studies seems to be a mere cataloguing/description of phenomena without a clear understanding of how organisational, time, national or other contextual forces may impact upon methodological choices (Welch et al., 2011).

Third, terms such as 'surroundings', 'environmental forces' and 'situational opportunities and constraints' (i.e. integral features of various definitions of context; Cappelli and Sherer, 1991; George and Jones, 1997; Johns, 2006) are methodologically and analytically more influential in

IB. This is not because context is more important in IB as opposed to generic business research (arguably, it is important in both disciplines). Rather, due to environmental heterogeneity (Matanda and Freeman, 2009), institutional variation (Vachani, Doh and Teegen, 2009), cultural plurality in markets (Johnson, Lenartowicz and Apud, 2006) or workplaces (Freeman and Lindsay, in press) and, overall, the resulting uncertainty (Lee and Makhija, 2009) integral in international markets along with the IB researcher's unfamiliarity with foreign market contexts (Malhotra, Agarwal and Peterson, 1996), all these context-related terms are inherently more complex and multi-dimensional in an international or cross-cultural setting (Cantwell, Dunning and Lundan, 2010; Johanson and Vahlne, 2009; Czinkota and Ronkainen, 2009). This complexity is implicitly reflected in various definitions of contextualisation, too (Rousseau and Fried, 2001; Zahra, 2007; Rousseau and Fried, 2001). 'Observations' and 'sites' are normally multiple and scattered across contexts in IB research while 'facts, events or points of view' are subjectively construed by varying and often conflicting cross-cultural norms and beliefs, thus adding to the complexity of international operations and resulting research investigations.

Fourth, IB incorporates both wider levels of context (e.g. nations) and also dimensions which may be relevant for generic, uni-national business research [e.g. competition between local firms and MNEs (Poulis, Yamin and Poulis, in press), local subsidiaries' practices (e.g. Solberg, 2000), the effect of national culture on decision-making (Tayeb, 1995), etc.]. Thus, incorporating context in methodological choices and consequently in the process of theorising is a more pressing need in IB investigations.

Finally, the need for contextualisation is emphasised by the fact that investigated organisations in IB research (MNEs) routinely contain embedded units of analysis, which are located in heterogeneous settings. Thus, IB researchers studying foreign markets often suffer from their own type of research-related 'liability of foreignness' due to an unavoidable, often integral unfamiliarity with the 'other' context (other market structures, other cultural make-ups, other institutional frameworks, etc.).

These observations reflect the enhanced role that context inherently holds in IB investigations, a field where context, its understanding and the 'exploitation' of its multiple forms could assume a

central role. However, despite key recommendations to provide deeper explanations of IB phenomena (Ghauri, 2004) and allow context to inform methodological choices (Welch et al., 2011), paradoxically, empirical IB research does not explicitly consider the central role of contextualisation in the formulation of research designs (Piekkari et al., 2009; 2010; Fletcher and Plakoyiannaki, 2011). Below, we present our experience from the field that encounters such challenges as the ones reflected above and consider tools that lead to a more context-sensitive treatment of sampling in case-study research.

3.   Context-sensitive selection in case-study research: Our experience from the field

In order to reconcile this striking imbalance between the need for contextualisation and the lack thereof, this paper applies Ragin's (1992) concept of "casing" (or the evolving case, p. 218) to the IB domain and argues that IB case researchers must iteratively swing between theory and evidence and inform their methodological choices over the course of the project rather than oversimplifying their decisions on pre-determined rules (Buchanan and Bryman, 2007). This implies an emergent, context-shaped reconsideration of the focus of the study, the unit of analysis and, hence, the case-study boundaries. Following this premise, this paper is structured around a framework (Figure 1) that employs the process of casing and was inductively created following an actual case study project in international marketing. It explains how various methodological tools were used to unveil and capture context complexity during the project. More specifically, increasing *calls for contextualisation* (Michailova, 2011; Tsui, 2007; Piekkari et al., 2009; Welch et al., 2011) and *methodological concerns* highlighted in the IB literature (Ghauri, 2004; Cantwell et al., 2010; Malhotra, Agarwal and Peterson, 1996) urged us to consider diverse tools and approaches (e.g. direct observation) that account for diverse dimensions of context (e.g. retailing, time, competitive, organisational context) and iteratively informed our context-sensitive case selection that unfolds from identification of a population framework up to finalizing the sample of cases.

Figure 1

A framework for context-sensitive case selection in IB: Our experience from the field
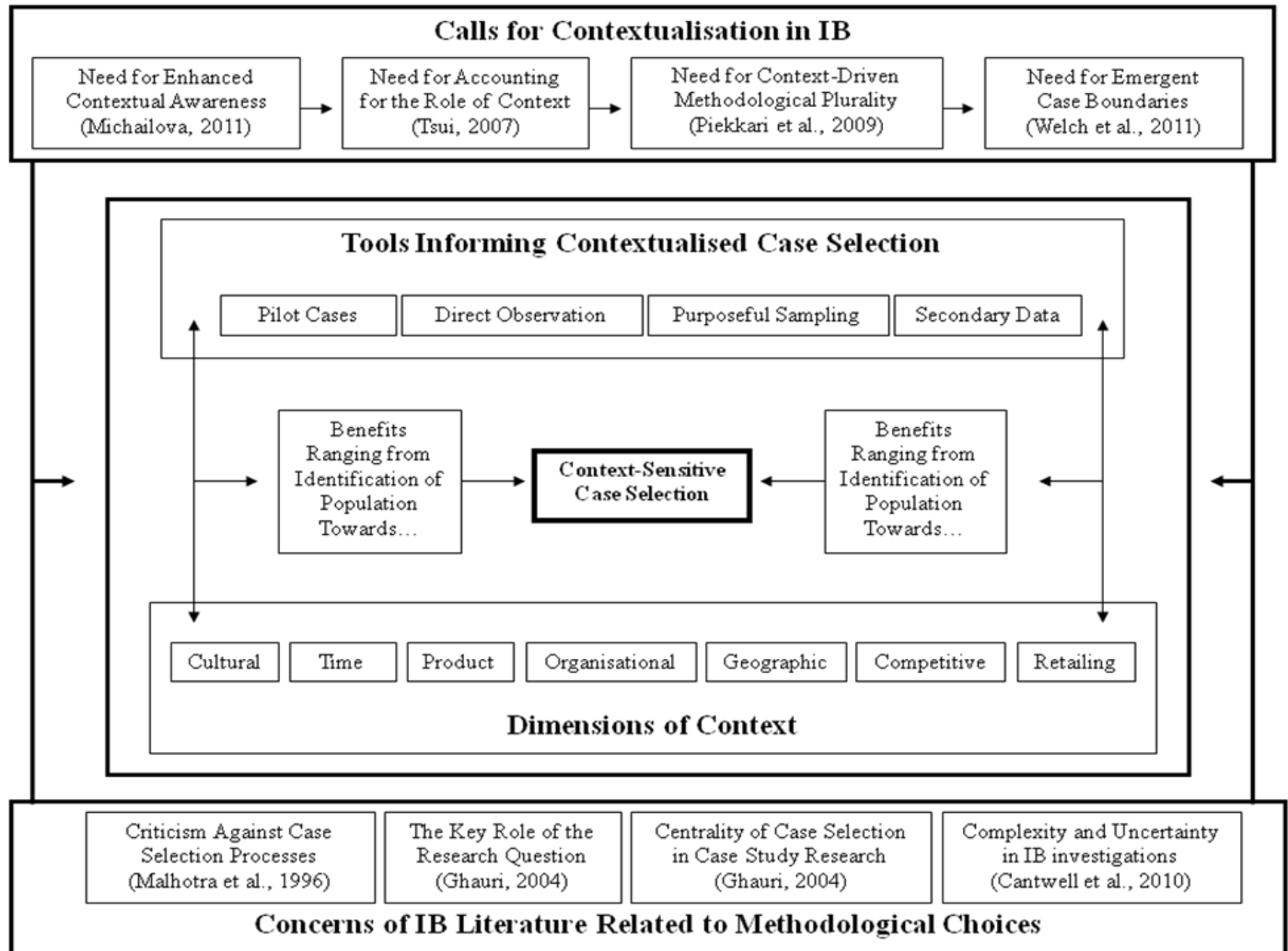
Table 1 below lists the empirical contribution that the four tools we employed offered in the course of our actual project. For example, purposeful sampling helped us in narrowing down the population and finalising the sample. Theory indicated which types of firms out of the many (in terms of nature of product) mostly lend themselves to a relevant investigation thus reducing the number of cases which could be meaningfully considered as 'candidates' for selection. Out of this narrowed pool of cases and in an effort to account for the role of competition or ownership structure (since, again, theory indicates their influence on relevant strategies) we purposefully

finalised a sample that reflects such theoretical concerns and considers variation across organisational, product and competitive contexts. In parallel, secondary data helped in narrowing down the population. For example, market databases which are developed for the Greek market indicated which these competing firms are or which firms fall under a multinational or domestic ownership status thus, facilitating the application of the aforementioned purposeful sampling principles. Further details of each contribution of each tool are offered throughout sections 3.2 to 3.5.

The project is discussed hereafter, but our aim is neither to generalise the applicability of these tools nor to generalise their contribution. Rather, it is a summative overview of the contribution that the tools we have employed offered to our specific project and thus a portrayal of how these specific methodological tools assisted us towards context-sensitive case selection (which is the central objective in Figure 1). Thus, we just point out that the relevant methodological literature provides case researchers with various sampling choices for promoting contextualisation in case selection, with these four tools being most fitting and helpful for the challenges we encountered in the course of the specific project.

Table 1

Contribution of methodological tools towards context-sensitive case selection in the current study

Tools	Contribution
Pilot Cases	Helped the study in terms of: * Identifying a population ('pool') of case studies of interest. * Informing further methodological choices regarding the theoretical criterion for case selection (i.e. purposeful sampling) * Excluding non-fitting firms
Direct Observation	Helped the study in terms of: * Enabling the case selection process * A structured recording of population * Understanding dimensions of context * Excluding non-fitting firms

	Helped the study in terms of:
Purposeful Sampling	* Theoretical concerns narrowing down the population * Finalising the sample * Understanding dimensions of context
Secondary Data	Helped the study in terms of: * Understanding dimensions of context * Selection of sites for direct observation * Narrowing down the population by facilitating purposeful sampling

Source: The authors

3.1 The context and the study

Multicultural markets (i.e. single markets with a multicultural consumer base) present often unnoticed implications, yet they are of fundamental importance and relevance for IB practices. Craig and Douglas (2001) observe that there is a need to adapt methodological choices to the uniqueness of such contexts in order to ensure meaningful results. Otherwise, notable methodological fallacies and erroneous findings may emerge for MNEs, such as inadequate accounting for the role of sub-cultures (Lenartowicz, Johnson and White, 2003) and the consequent need to tailor business activities (Poulis and Poulis, in press). Nevertheless, researchers in such contexts often adopt a convenience, context-free logic for sampling purposes, leading to misclassifications (Ogden, Ogden and Schau, 2004) and notable misinterpreted findings (Douglas, Morin and Craig, 1994). The study described hereafter faced such context-related challenges.

The aim of the study was to shed more light on the practices of fast-moving consumer goods (FMCG) firms operating in a multicultural market that witnesses a large influx of foreign consumers/tourists. Greece, a country of 11 million inhabitants, annually attracts 16 million foreign consumers from numerous countries (UK, Germany, Italy, Scandinavian countries, etc.). This emergent multiculturalism generates challenging implications which are of relevance to the

IB field. More specifically, the objective of the project was to explore how and why FMCG firms standardise or adapt marketing activities both across (e.g. UK and Greece) and within (e.g. towards British, German, Greek consumers) multicultural markets. A detailed, exploratory, case-study approach was preferred for its ability to shed light on the multiple contexts that make up the research scene for the project. A diverse cultural context of consumption, a temporary retailing context that serves foreign consumers, a fragmented time context with highly seasonal consumption and a competitive context which aggravates intensity between local and multinational firms implied that a methodology such as exploratory multiple case studies, which is sensitive to contextual diversity, is preferred for answering questions related to the 'how' and 'why' behind standardisation/adaptation decisions (Ghauri, 2004). Moreover, our methodological choice followed the limited use of qualitative papers that empirically examine standardisation/adaptation issues and the concurrent need for further theoretical development and grounding of the field through qualitative studies (Schmid and Kotulla, 2011).

As illustrated above, several dimensions of context discussed in the literature (Bamberger, 2008; Johns, 2006; Li and Meyer, 2009; Rousseau and Fried, 2001; Tsui, 2007) were indeed particularly relevant for this study, including the cultural context (i.e., consumers' cultural diversity), the industry/product category context (how the phenomenon affects which sectors), the competitive and organisational context (MNE subsidiaries vs. local firms), the geographical context (the geographically unequal tourism development within the focal country and other countries), the retail context (different retail structures in tourism and non-tourism areas) and the temporal context (the extreme seasonality of tourism), lack of understanding of which may lead to omitting information-rich cases during sampling. In an effort to deal with contextual challenges and avoid a convenience-sampling logic, the study collected diverse information from multiple contexts that represented a response to emerging sampling challenges. This process gradually defined the boundaries of the case and helped in identifying the sample, which could not be determined beforehand. The paper hereafter explains how each methodological tool contributed to case selection. At this point, though, it is important to highlight that we have not followed these tools in a linear fashion and we do not rank them in terms of importance. Rather, the steps unfolded in conjunction, under the guiding umbrella of purposeful sampling, and were

iterative and overlapping in order to inform sampling decisions and put methodological concerns into context.

3.2 Pilot cases

George and Bennett (2005, p.75) label this type of case study "plausibility probes". These are preliminary case studies on relatively under-investigated areas that can facilitate selection of future case-study milieus. Specifically, pilot cases facilitated identifying population boundaries and choosing one or more accessible cases out of this identified population, which features as a key component of case study practices in IB (*cf*. Ghauri, 2004).

Out of diverse services, B2B, consumer goods and fast moving consumer goods (FMCG) sectors, the study accepted the challenge of identifying and focusing on those that are the most relevant to the study's objective. Thus, four pilot studies took place, which aided in the identification of dimensions of context and for drawing a population framework. The study based the rationale for the selection of pilot cases on a snowballing technique where data collection in the preceding cases facilitated identification of new cases. Incrementally and as the process of interviewing evolved, fieldwork revealed that a consumer goods firm sells its branded goods not only directly to tourists through existing retailing outlets (e.g., a mini-market) but also as a B2B firm to tourist establishments such as hotels and restaurants (e.g., a raw material such as sugar for further processing). In the pilot phase, the project included both types of firms since no knowledge existed on what difference, if any, this distinction makes for the firms' decisions. These pilot cases informed aspects of the case-study selection process in numerous ways. First, pilot studies enabled researchers to identify the boundaries of the population. Particularly, the study excluded B2B firms (selling to tourism firms and not directly to tourists) as a potential part of the population, although without denying the significance of tourism for such firms. The pilot cases did, however, indicate one critical thing: the role of cultural diversity diminishes for B2B firms (just limited to the indirect effect of derived demand), whereas culture seems to be a significant force of influence for firms addressing tourists directly. Therefore, due to the conceptual background of the study and the central role of culture's influence on firms, the branded B2C consumer goods industry became the focus of the study. This insight from pilot

studies also helped considerably in the selection of the embedded unit of analysis: in firms that have both a B2B and a B2C nature through multichannel distribution systems, the study focused only on the B2C business unit of the firm. Otherwise, the study would include selecting and interviewing units of analysis at the holistic (and not embedded) level, which would fall outside the scope of the research.

Pilot studies also indicated most related product category sectors in terms of the central characteristic of the market context and the key element in the study's research questions (i.e., the cultural diversity of the consumer base). This indication resulted in an initial focus on the branded FMCG and not the consumer durables sector as methodologically the most appropriate context for this study. This focus is because purchases of non-FMCG, durable or even semi-durable consumer goods do not feature as major items of tourist expenditure. Even if they do, though, tourists mainly purchase them as souvenirs for which the notion of "standardisation/adaptation" (the "dependent" construct in research questions) does not apply. Thus, pilot studies offered a contextualised approach as to how tourism affects non-tourism industries and informed the decision to focus on FMCG firms.

Moreover, this contextualised approach to sampling also allowed exclusion of non-fitting firms from the sampling framework. For example, initially the study included the tobacco industry as a potential source of "candidates" for primary data collection (since tobacco is an "archetypical" FMCG). However, after an interview with a tobacco firm, fieldwork indicated that sampling such a firm for the purposes of this specific study is irrelevant to the nature of the research questions (i.e., the standardisation/adaptation issue). The resulting exclusion of such firms was due to the high levels of brand loyalty that exist among consumers for tobacco products which makes the dilemma of "standardisation versus adaptation" less relevant. Such an understanding became possible only through pilot interviews. Otherwise, the sample would lean towards standardised practices. Of course, a focus on tobacco firms is extremely useful for other research purposes in such contexts, and especially regarding how local tobacco firms manage to counterbalance this inherent competitive deficit. Nevertheless, in the context of a standardisation/adaptation discussion, including tobacco firms deviates from the focus.

Additionally, pilot cases empirically echoed suggestions in the literature that firms in diverse sectors (food, beverage, cosmetics), across diverse types of competition (e.g., big vs. small firms) and firms with different ownership structures (local firms, MNE subsidiaries) need to be included in the sampling process. The observed differences in strategic choices across firms with such characteristics stressed the need for such a sampling variation. Therefore, pilot studies offered key benefits towards contextualising the sampling process of our study (see Table 1 for a summary). They assisted in narrowing down the population to the branded FMCG industry, excluding candidate firms from the population and highlighting the need for sampling variation across different criteria.

3.3 Direct observation

The literature acknowledges the value of direct observation during fieldwork and often as a means for triangulating findings (to enhance internal validity; Pauwels and Matthyssens, 2004 or test for consistency of primary findings, Alam, 2005). However, it pays insufficient attention to direct observation's potential for enabling context-sensitive case selection at an early phase in fieldwork. In the current study, direct observation helped in noting firms which were associated with the problem under scrutiny and could serve as rich sources of information. The process included (Table 2) direct observation of retailing spots in both typical tourism-oriented areas and non-tourism areas of the country. This observation allowed us to understand the chronological, geographical, retail context of the study:

- As far as the chronological context is concerned, observations took place during both the tourist (July) and non-tourist (January) seasons in Greece in order to identify firms that have a consistent retail presence across both seasons. This process helped in isolating firms which have an interest either only in the purely "local" market (i.e., Greek consumers) or only in the "summer" market (i.e., tourists) created by tourism; neither category was of interest to the study.

- The geographical context was served by the decision to select three archetypical tourist regions (mostly international tourists) and three non-tourist residential neighbourhoods of Athens. The study chose the three tourist regions in terms of the types of tourists they attract: one attracts more individual travellers, another attracts mostly package-tourists,

while the third is large enough to accommodate tourists of all tastes and types. This distinction was important because a significant part of the tourism literature acknowledges different types of tourists who have varying attitudes and distinct purchasing behaviours (Quan and Wang, 2004; Wickens, 2002). Therefore, FMCG firms' practices in each of the aforementioned areas may significantly differ as a result of firms' effort to reflect this diversity of consumer preferences.

- The retail structure in a country may vary. Thus, direct observation allowed us to specify the prime channels of distribution that can be found in tourism and non-tourism areas of the country. The observation documented three typical retailing channels that one can find in both tourism and non-tourism-related spots in Greece: mini-markets, convenience stores and kiosks. The study excluded supermarkets because direct observation showed that these do not feature as prime retailing channels in tourist areas (while being predominant in non-tourist areas).

Thus, the study observed (i) 30 outlets; (ii) across three types of retailers; (iii) twice a year; (iv) in three areas of tourism and an area of non-tourism activity in the country. This observation process, illustrated in Table 2, led to a critical outcome for drawing an unambiguous population framework. It allowed us to document all brands that one can find in these outlets during both seasons, i.e. brands that firms market across foreign and domestic populations. The study considered all documented brands and the firms that sell them comprised the study's population (all FMCG firms addressing both Greek and foreign consumers).

Table 2

The chronological, geographical and retailing context of direct observation in the current study

CHRONOLOGICAL CONTEXT: January & July		RETAILING CONTEXT			
		No. of Kiosks	No. of Convenience stores	No. of Mini-markets	TOTAL
GEOGRAPHIC CONTEXT	Areas of Domestic Population	4	4	4	12 retailing outlets visited in these areas
	Areas with Individual Tourists	2	2	2	6 retailing outlets visited in these areas
	Areas with Package-tourists	2	2	2	6 retailing outlets visited in these areas
	Areas with Mixed Portfolio of Tourists	2	2	2	6 retailing outlets visited in these areas
	TOTAL	10 Kiosks visited	10 Convenience stores visited	10 Mini-markets visited	

More specifically, the process that is reflected in Table 2 helped the study in identifying firms that serve both locals and tourists alike and do not offer 'touristy' products exclusively or primarily focusing on tourists. These firms sell brands belonging to product categories that one can find in all markets where tourists come from. An example is an ice cream producer, since ice cream belongs to a product category that exists in virtually all countries where tourists come from. On the other hand, this observation tool excluded products that are unique to the local market such as local spirits or traditional food products, which firms standardise by default (mostly selling them as souvenirs or gifts). Thus, direct observation proved to be the only means through which one can safely exclude firms that are temporarily active in the market due to tourism. Such firms were observed to operate in the country either as sporadic, opportunistic importers of brands from countries that send tourists to Greece or as parallel importers. For such firms, too, the issue of standardising or adapting their products does not stand. Their only goal is to place their standardised offerings in tourist enclaves. Thus, this study, due to its focus on

standardisation/adaptation, did not have an interest in firms that either focus on locals or tourists in a separate fashion. Rather, the study focused on firms that have an active interest in, and design standardised and adapted strategies for, both populations. The final outcome was a structured recording of all firms that address to both i) the domestic population during winter in non-tourist areas and ii) the tourist population during summer in prime tourist areas. All 157 firms are established players in the FMCG sector and have a long-standing presence in their respective markets, comprising food firms selling snacks, chocolates, ice-creams, beverage firms selling soft-drinks, alcoholic drinks, milk, juices, fast-food chains, and cosmetics firms selling shampoos, toothpastes, skin lotions, etc.

3.4 Purposeful sampling

The principles of purposeful sampling permeated the study's sampling decisions, stressing the need for a theory-driven selection of cases along with a consideration of contextual idiosyncrasies. Purposeful sampling refers to the selection of 'archetypical' cases where phenomena are most likely to serve the theoretical purpose of the research and its questions (Silverman, 2000; Stake, 1995). This study's application shows how purposeful sampling, and maximum variation in particular, may integrate with additional methodological tools to provide a context-sensitive sampling framework. Specifically, the study selected cases on a purposive sampling logic with an attempt to incorporate the following variations in context:

- The competitive context: secondary data and interviews assisted in understanding the competitive context, which allowed sampling firms that compete against each other in their respective sectors. This outcome also helped exploring the effect of competition on firms' standardised/adapted strategies (Jain, 1989; Rose and Shoham, 2002; Rosen, 1990), thus reflecting related expectations in the research objectives and echoing remarks in the literature.

- The organisational context: the study aimed at having a fairly equal representation of domestic and foreign firms in order to explore the potential influence on standardisation/adaptation of several organisational factors suggested in the international marketing literature, such as firms' size (Culpan, 1989; Whitelock and Pimblett, 1997), firms' international business experience (Cadogan, Diamantopoulos and Siguaw, 2002;

Cavusgil, Zou and Naidu, 1993), orientation towards international operations (Perlmutter, 1969; Zou and Cavusgil, 2002), and a subsidiary's autonomy for locally responsive strategies (Ozsomer, Bodur and Cavusgil, 1991; Solberg, 2000).

- The product category context: since the nature of the product is documented as having an influence on standardised/adapted practices (Boddewyn, Soehl and Picard, 1986; Whitelock and Fastoso, 2007), the study chose to use an analogous number of FMCG firms across all food, beverage and cosmetics sectors.

3.5 Secondary data

The IB literature strongly recommends the use of secondary data (Yang, Wang and Su, 2006) since these provide empirical depth into a case-study project (Welch, 2000). Sources of secondary data for this research (from the National Statistical Service, the Institute of Tourism Research and Forecasting, the Hellenic Association of Travel and Tourist Agents and the Union of Greek Tourism Entrepreneurs) unveiled the structures of the FMCG and tourism industries and helped researchers tackle challenges during the theoretical and empirical parts of the research. The study also consulted annual reports and descriptive data from the World Tourism Organisation in the beginning of the effort, so as to appreciate the scope of the expected contribution of the project. Moreover, industry analyses by leading market research firms provided access to key intelligence on related companies and markets. These analyses backed up the sampling logic and helped in finalising the sample. So, overall, secondary sources helped considerably in understanding the country, industry and organisational contexts.

More specifically, the study selected forty of the firms in the identified population with the assistance of Euromonitor's sectoral analyses and using a maximum-variation, purposeful-sampling logic, and approached these firms by telephone. After a necessary exchange of documents, drafts and clarifications, 23 of the original 40 firms agreed to collaborate; the rest refused, either for reasons of availability of time or due to the official policy of the firm towards disclosing sensitive corporate data. Of these 23 firms, 18 met the criterion for maximum variation discussed in the previous section. The final configuration of cases (Table 3) reflects the

concern for maximum variation, that is, a balanced number of competing firms with different ownership status (foreign vs. local) in varied product categories (food, beverage, cosmetics).

Table 3

The sample in the current study

	Food retailers	**Packaged Food**	**Beverages**	**Cosmetics**
Domestic firms	2	2	2	2
Foreign firms	3	2	3	2

Thus, secondary data helped in i) selecting three archetypal tourism areas of the country that served as the context for direct observation; ii) selecting the 40 most relevant (on the basis of maximum variation) FMCG firms out of the observed population of 157 firms, so that the study did not deal with significant differences between the ideal sample (cases that one would like to collect information from) and the final sample (cases from which the study actually collects information); and iii) finalising the sample of firms across food, beverage and cosmetics sectors.

4. Contribution

Context matters for several reasons, such as explaining variation in research findings, better explaining the practical implications of research, aiding theorising, selecting research sites, and measuring, analysing and interpreting data (Johns, 2006; Rousseau and Fried, 2001; Tsui, 2007). The current effort aimed at empirically demonstrating that, within IB case research, context also matters for sampling purposes.

First, we highlight the importance of context for the study of IB phenomena by offering an experience-based explication of the role of context(ualisation) in methodological choices. Thus, the study moves beyond normative suggestions for contextualising business research which tap into a view of context as a disruption for generalising findings. By empirically illustrating how multiplicity of contexts and various methodological tools may aid understanding, the study

addresses context explicitly (and not per definition as is the norm in IB; Michailova, 2011) and, overall, stresses how the uniqueness of each context may influence IB research designs.

Second, specifically, we explicate the role of context for case selection purposes in IB research. While the extant literature increasingly stresses various benefits of contextualisation, it does not explicitly notice the role of context for case selection processes. Actually, the IB literature rarely sees the two in conjunction; IB researchers normally take context for granted or simply treat context as a non-essential part of case selection (Welch et al., 2011). This practice may be due to a misinterpretation of suggestions by two leading authorities followed by case-study researchers in IB. These case researchers traditionally build their case selection logic on either Yin's (2009, p. 26) "logical sequence" or Eisenhardt's (1989) "nine steps". An important feature to consider is that the way IB researchers utilise these authors' suggestions reveals a positivistic ontological orientation which follows the main mindset in the overall IB domain (Redding, 2005). Thus, there is a heavy reliance on rigidly structured steps and pre-determined processes. For example, researchers often utilise Eisenhardt's (1989) step 2 ('Selecting Cases') as literally the second stage of a rigid linear process instead of intermingling stage 4 ('Entering the Field') with the case-selection processes at stage 2 (thus, step 4 informing step 2). Thus, if researchers use these steps in a linear and not in an iterative fashion, they are inclined to specify case components early (ranging from the research question to closure of research) as a result of a carefully pre-designed plan. Everything else in the surrounding context seems to fall under what Buchanan and Bryman (2007, p. 483) coin as "unwelcome distractions", resulting in a view of case-study research as a linear process (Dubois and Gadde, 2002). This study, though, demonstrates the need for IB to welcome and embrace context beyond any "sequence" or linear approach and explicates the benefits of considering the emergent features of the context together with case selection. Thus, from being a nuisance, context becomes a core element woven into the research design and informs case selection.

Third, we show how case researchers may incorporate context in their sampling decisions utilising a context-sensitive framework for case selection. This paper explicates specific tools, complemented by the overarching principle of purposeful sampling, which contribute towards the identification of dynamic case boundaries. Viewed in this light, the paper fleshes out the

notion of casing (Ragin, 1992) and demonstrates that iterative thinking, dynamic reflection and multiple sources of information can only lead to discovering critical dimensions in the case selection process, dimensions that an IB researcher may not otherwise notice.

5. Further research and conclusions

We have attempted to open up the discussion on context-sensitive case selection and set directions for future research. First, researchers need to consider what the population is and which cases within this population are more suitable for exploring a study's research questions. This concern becomes especially important in cross-cultural settings, where researchers typically face limitations in selecting cases from a largely unknown population (Pires, Stanton, and Cheek, 2003) or may lack the skills or knowledge for carefully reading and understanding country data and local idiosyncrasies (Craig and Douglas, 2001). Thus, further research could suggest additional tools that would facilitate further contextualisation of case-selection processes and are more fitting to given idiosyncratic environments.

Second, researchers need to consider why some cases are chosen while others, despite their potential criticality for the issue under investigation, may not be considered. Arguably, all IB studies omit cases for various methodological reasons. For example, access to organisations in a foreign country is a pragmatic barrier to case selection in IB, and is a feature of the study discussed here, too. However, such reasons do not reflect a solid methodological rationale why researchers choose one case over another and ignore the fact that neglecting conceptually significant cases can result in the emergence of problems in theorising and interpretation across contexts (Rousseau and Fried, 2001). Thus, future studies could incorporate more context-shaped justifications into their methodological sampling choices to make stronger arguments and enhance the trustworthiness of their case-based studies.

Third, it is worthwhile stating that a universally accepted sampling frame that can safeguard the case selection process is neither feasible nor desirable. Rather, future case researchers in IB should strive for *contextual appropriateness* of case selection, i.e. relevance and focus, through empirical evidence that reflects the idiosyncrasies of each context and allows them to find cases

that cannot be pre-determined. This also avoids two particular types of sampling error that often arise in qualitative research (Patton, 1990): the first relating to distortions that insufficient breadth in sampling can cause, which echoes this study's concerns with regards to ignoring/marginalising critical cases, and the second to distortions introduced by changes over time, which echoes the need for an incremental and detailed understanding of the context in which potential cases reside.

Concluding, the nuances of case selection that this study discusses may be fitting for its purposes but may not always be relevant or practical to implement in other contexts. Thus, one must not see this work as an effort to suggest widely applicable rules. This limitation, however, is the study's strength, since "it is extremely difficult, and even questionable, to set out simple rules or normative research instructions for case-study research" (Halinen and Törnroos, 2005, p. 1286). Rather, each research project "… calls for the researcher to bend the methodology to the peculiarities of the setting" (Miles and Huberman's, 1994, p.5). The guiding principle for this study's empirical illustration of contextual appropriateness is theoretical suggestions for situational responsiveness (Patton, 1990, p. 39), context-driven methodological inventiveness (Buchanan and Bryman, 2007, p. 486) and overall a more pluralistic approach to conducting case studies that opens up methodological alternatives to IB researchers (Piekkari et al., 2009; Tsui, 2007). The present paper empirically contributes to this increasing body of literature, cautioning against methodological rigidity and lack of appreciation for contextual idiosyncrasies in IB.

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