

## How to Write a Case Study

### What Is a Case Study?

A case study is a puzzle that has to be solved. The first thing to remember about writing a case study is that the case should have a problem for the readers to solve. The case should have enough information in it that readers can understand what the problem is and, after thinking about it and analyzing the information, the readers should be able to come up with a proposed solution. Writing an interesting case study is a bit like writing a detective story. You want to keep your readers very interested in the situation.

A good case is more than just a description. It is information arranged in such a way that the reader is put in the same position as the case writer was at the beginning when he or she was faced with a new situation and asked to figure out what was going on. A description, on the other hand, arranges all the information, comes to conclusions, tells the reader everything, and the reader really doesn't have to work very hard.

When you write a case, here are some hints on how to do it so that your readers will be challenged, will "experience" the same things you did when you started your investigation, and will have enough information to come to some answers.

There are three basic steps in case writing: research, analysis, and the actual writing. You start with research, but even when you reach the writing stage you may find you need to go back and research even more information.

### The Research Phase:

1. **Library and Internet research.** Find out what has been written before, and read the important articles about your case site. When you do this, you may find there is an existing problem that needs solving, or you may find that you have to come up with an interesting idea that might or might not work at your case site. For example, your case study might be on a national park where there have been so many visitors that the park's eco-system is in danger. Then the case problem would be to figure out how to solve this so the park is protected, but tourists can still come. Or, you might find that your selected site doesn't have many tourists, and one reason is that there are no facilities. Then the case problem might be how to attract the right kind of businesses to come and build a restaurant or even a hotel -- all without ruining the park.

Or your case study might be on historic sites that would interest tourists -- IF the tourists knew where the sites were or how to get to them. Or

maybe your case study is about how to interest people in coming to your country so they can trace their family's historic roots (origins).

Once you have decided on the situation or issue you would like to cover in your case study (and you might have several issues, not just one), then you need to go to the site and talk to experts.

2. **Interview people who know the place or the situation.** Find knowledgeable people to interview -- they may be at the site itself or they work in a government office or company that deals with the historic preservation. In addition to people who work in the site, talk to visitors.

When you are interviewing people, , ask them questions that will help you understand their opinions, questions like the following:

"What is your impression of the site (maybe it's an old fort, or a burial site, or an excavation of historic interest)?"

"How do you feel about the situation?"

"What can you tell me about how the site (or the situation) developed?"

"What do you think should be different, if anything?"

You also need to ask questions that will give you facts that might not be available from an article, questions like:

"Would you tell me what happens here in a typical day?"

"What kind of statistics do you keep? May I have a copy?"

"How many businesses are involved here?"

When you ask a question that doesn't let someone answer with a "yes" or a "no" you usually get more information. What you are trying to do is get the person to tell you whatever it is that he or she knows and thinks -- even though you don't always know just what that is going to be before you ask the question. Then you can add these facts to your case.

Remember, your readers can't go to your site, so you have to "bring it to them."

### **The Analysis Phase:**

1. **Put all the information in one place.** Now you have collected a lot of information from people, from articles and books. You can't include it all. So, you need to think about how to sort through it, take out the excess, and arrange it so that the situation at the case site will be understandable to your readers. Before you can do this, you have to put all the information together where you can see it and analyze what is going on.
2. **Assign sections of material to different people.** Each person or group should try to figure out what is really important, what is happening, and

what a case reader would need to know in order to understand the situation. It may be useful, for example, to put all the information about visitors on one chart, or on a chart that shows visitors to two different sites throughout a year.

3. **Try to formulate the case problem in a few sentences.** When you do this, you may find that you need more information. Once you are satisfied with the way you have defined the problem you want your readers to think about, break the problem down into all its parts. Each one represents a piece of the puzzle that needs to be understood before the problem can be solved. Then spend some time discussing these with the others in your group.

For example, suppose:

- a. Your heritage site doesn't have many visitors, but many people say they would like to visit if it had services
- b. There is unemployment in the village around the site,
- c. The town is big enough to be able to accommodate many more visitors, and
- d. The surrounding environment (animals, trees and plants) need to be protected from too many visitors
- e. The town is far away, but there are no places to eat or sleep around there
- f. The government owns the location, but the government does not want to own and operate either a restaurant or a hotel

Ask yourselves: "How much information do people who will read your case study need to have in order to be able to discuss items **a** through **f**?"

One answer to "a." is that they need to know data about past numbers of visitors, and they need to know what evidence exists that more people want to visit but are discouraged from going there. Your evidence will come from the articles and statistics you have gathered, and from the interviews you have completed.

Once you have broken down the problem into pieces, you can analyze the information you now have and see if you can think about possible answers to each of the pieces. If you have enough information, then you can think about how to write the case study itself.

### **Writing the Case Study:**

1. **Describe the problem or case question you want the reader to solve.**

In a detective story, the crime happens right at the beginning and the detective has to put together the information to solve it for the rest of the story. In a case, you can start by raising a question. You can, for example, quote someone you interviewed. For example, suppose you interviewed a tourist official and she told you she thought more people should be interested in visiting, and she can't understand why they don't come. Then you could write something like this,

*The historic town of XX is located in the mountains of country X. The town tourism supervisor, Mrs. Joan Smith, said that she thought "many more people should visit here, but they just don't come. I don't know why – maybe we don't have the right kinds of places for them to eat or sleep and it's too far to travel in one day from the nearest big city."*

*The case writers wondered what would have to happen in order to make the town more attractive to tourists..*

Because you are the authors, you and your fellow students, can write questions like this and set the stage for the rest of your case story. What your introduction does is give clues to the reader about what they should be thinking about.

Once you have told the reader what one person associated with the tourist area thinks the problem is -- *how to make the place more attractive* -- you can give them the information they need to come to their own conclusions

2. **Organize the sections of the case.** You will probably need to organize your information under topics like the following:

- a. **Introduction** to the problem
- b. **Background on the place** -- where is it, how big, what climate, etc. -- this part should be a brief, overall description. Think about having 2 pages of written material, photos, or even a video, so that your readers can really get a feel for what the place looks like. Summarize the main features of the place. What makes it special?
- c. **Visitors to the place** -- you want to make the reader do some work, so you can say that the number of visitors are shown on a table or chart you have compiled. You might want to include a chart that shows the number of visitors that come to another similar kind of place that does have facilities. This will let your readers make some comparisons. If possible, include information you received when you talked to visitors - what did they like, dislike? What did visitors think should happen to make the place more attractive?

- d. **Government Policy** -- include information about what government policy is with respect to this place. What is allowed, what is not allowed. Can policy be changed, and by whom?
- e. **Business Opportunities in** -- you have already said there are not enough facilities for tourists. Well, now you need to provide information on what it might cost to put a nice restaurant for tourists. Suppose in one of your interviews, you talked to a business person who said that it would cost \$25,000 to put a snack bar by the historic site. You need to give your reader that information, but that's not all. You also have to provide some information about what a typical snack bar menu would have, how much the food would cost to make and sell, and what price the owner would have to put on each item so that the price would not be too high for people to pay. And your reader has to figure out how many people would have to eat there in order for the snack bar to make money. This is where the statistics come in. Are there enough people who visit now that the snack bar could expect to make money? How about the number of visitors to the other similar place -- what if that same number of people came. How would the snack bar do then?
- f. **Potential employees.** You can't add facilities without adding people to staff them. Are there enough people in the local community to fill the new jobs that would be added? Do they have the right kind of education and training to fill those jobs, or would the snack bar owner, or the new hotel owner, have to train people, or bring people in from other locations? Could the local school system provide the necessary training?

You don't have to do all the calculations for the reader, but you need to do them yourself so that you know the reader will have enough information in the case to do them. For example, before you can decide whether a snack bar might be a good idea, you have to estimate whether you could get more visitors --and how many more. Can you match the number that go to the other similar place that has facilities? Or is your location so much farther to travel that you don't think that many more people would come. And just how many people have to use the snack bar in order for the owner to get back his \$25,000 investment and also make some profit to pay himself a salary? This kind of analysis is really looking at the question of what kind of business opportunities are there. Would a souvenir shop be a good idea?

Did you do this kind of analysis before writing? If not, then you will have to stop and think some more. Maybe you will need to find more information before you can continue writing.

- g. **Environmental Implications for Animal and Plant Life of Changes in the Area.** Since you already know that more visitors will cause a change, an

important factor to consider is what will be the impact on plants and animals. Some places protect the plants by only letting visitors walk on special paths and visitors cannot pick any flowers or plants. Others say visitors can't feed the animals, or rules say visitors must hire a guide if they are going into certain areas. Whatever the situation, you need to consider this question very carefully.

**Other sections of the case.** Depending on the case you are researching and writing, the sections of the case will need to be organized so that each type of information is in its own section and understandable to the reader. You might not use all the sections described above, but certainly your case study will need to consider the business and economic implications of tourists for your area, and equally important, the implications for the plant and animal life. Tourism has economic implications and environmental implications. Good planning must take both into account.

**Conclusion.** Your case will need a conclusion. Rather than putting in your answer in the case, leave the reader with some more questions. For example, you might have learned that there is a government policy that says "*No private enterprise is allowed to change any part of the historic site.*" So you might conclude with a paragraph like this:

*The mayor and tourism minister discussed with the case writers whether or not it would be a good idea to prepare a plan for putting a snack bar inside the old fort without changing the way the building looks. The plan could be used to show the government that a policy change to allow private enterprise would be a good idea. "Is there enough value in adding jobs in the village?" asked one of the case writers. Another said, "I think there is enough evidence that expansion would be the right thing to do." Still another case writer disagreed. What is your conclusion?*

By ending your case on a question like this, you let your readers discuss the situation themselves. If you have written a good case, they will have enough information to understand the situation and have a lively class discussion.

The whole purpose of writing cases and sharing them with others is to share experience without all of us actually having to be in the same place. There is a trade-off between developing a place to make it more accessible to tourist so local jobs can be created and on the other hand protecting the environment from too many visitors. And this is a question that faces more than one country. But how the trade-off is resolved can vary from country to country. One country's solution might be useful for another country to know.

## **Making Sure Your Case Can Be Used in Another Country**

Since different countries have different languages and cultures, you need to prepare a *Note for the Instructor* gives additional background material that the teacher might need to know in order to help guide the student discussions.

It is often interesting to record any changes that actually occurred after or while the case was being researched and written. Once students have learned about a situation, they find it is very interesting to learn more. But this information should be separate from the case study so that it doesn't influence the class discussions.

If your case uses special terms, words, or refers to cultural customs that people in another country might not recognize, information about them should be put in the case (at the end in an appendix) or in the *Note for the Instructor*.