Pragmatism: A Methodological Approach to Researching Strategic Alliances in Tourism

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ABSTRACT This paper brings together three streams of social science literature (paradigms, tourism research and strategic alliance practice) in order to further the debate on the need to adopt an appropriate paradigm in tourism research. By reviewing past research methods used in tourism the paper singles out pragmatism as a methodology that could yield better research insights because of its potential to allow the mixing of methods. A model based on pragmatism that could be used by researchers in tourism has also been developed, one which gives room for application of any theory or discipline. This model has been developed taking into consideration the fact that tourism has eclectic origins.

Introduction

This paper draws from Downward and Mearman’s (2004) inspirational article assessing the status of tourism research in terms of the philosophical underpinnings of research methods and techniques of analysis. Their concern about the debate on combining methods without serious consideration of ontological implications in tourism and hospitality is mostly relevant and perhaps overdue. Drawing from the work of Lawson, they conclude that ‘clarifying the ontological basis of inferences and yielding a logically consistent triangulation of methods is made possible through embracing a critical-realist perspective’ (2004, p. 119). This article shares their concern and acknowledges their framework as a ‘coherent and rigorous logical basis upon which triangulation can proceed in tourism and hospitality research’ (ibid., p. 117). However, their view of pragmatism as a ‘vague’ philosophy that should not be relied upon is challenged. Pragmatism has been hailed as the foundation of mixed methods and, depending on the nature of research, it can be adopted to yield better outcomes. However, there is a plethora of texts which present a wide range of research methodologies from which to select the most appropriate for a particular research project. For instance, there are various dimensions for theoretical and methodological choices, most of which have been well captured by Burrell and Morgan (1979) whose abstract classification schema for understanding broad streams of social science approaches to empirical research has inspired many scholars (Chua, 1986; Laughlin, 1995).
Two major social science paradigms – ‘positivist/functional’ and ‘interpretative’ approaches to research – have dominated claims regarding their superiority in management research and many authors have identified a number of different paradigms which largely depend on this positivist/interpretative dichotomy (Burrell and Morgan, 1979; Laughlin, 1995; Lincoln and Guba, 2000). Indeed, it has been argued that ‘to be located in a particular paradigm is to view the world in a particular way’ (Burrell and Morgan, 1979, p. 24). Paradigms thus define different views of the social world based upon different meta-theoretical assumptions with regard to the nature of science and society. These methodological approaches are mostly relevant to strategy and tourism research. Although most tourism textbooks do not address these theories, both Jennings (2001) and Davies (2003) underscore the importance of these paradigms to tourism research. While evidence suggests that past tourism research has been largely dominated by quantitative methods (Dann et al., 1988), there is a growing indication of increasing methodological diversity being adopted by tourism researchers (Morgan and Bischoff, 2003) and that discussion of research philosophies as they apply to tourism research can no longer be neglected.

Tourism and Strategic Alliance Research

Tourism is one of the most highly integrated industries in the world (Bullock, 1998; Dale, 2000) and Poon (1993) uses Porter’s (1987) model of the value chain to argue that major players in the tourism industry, particularly airlines, hotels, travel agents and tour operators, have increasingly integrated in an industry whose boundaries are becoming increasingly blurred. Indeed, Poon argues that ‘it is no longer relevant whether a company is an airline, a travel agent, hotel or tour operator. As the boundaries among players are redefined, what becomes more relevant are the activities along the value chain that they control’ (1993, p. 215).

One defining characteristic of these relationships is the proliferation of strategic alliances within the industry and between it and other sectors of the economy. Strategic alliances are ‘purposive tactical arrangements between two or more independent organisations that form part of, are consistent with participants’ overall strategy, and contribute to the achievement of their strategically significant objectives that are mutual beneficial’ (Pansiri, 2005, p. 1099). Go and Hedges (1994) predicted the formation of more strategic alliances among a variety of partners as a way of meeting the needs of the traveller. Peattie and Moutinho (2000) emphasized the need for various segments of the travel industry to stay linked in order to provide the quality of service demanded by the increasingly sophisticated and demanding traveller. The argument is that strategic alliances can be used effectively in order to achieve growth and competitiveness which, in this industry, take a variety of forms and occur across vertical, horizontal and diagonal relationships (Poon, 1993; Bullock, 1998; Go and Appelman, 2001; Dale, 2003). This is so because tourism is a ‘highly complex compounded service brought about through the “assembly” of different services that are being delivered by a network of companies that is often global in scope’ (Go and Appelman, 2001, p. 184).

Thus, there is need to put more emphasis on researching such relationships in tourism. Most of the research on strategic alliances among tourism businesses reflects the academic origin of the authors who mostly come from a management background. For this reason they are mostly quantitative (Contractor and Kundu, 1998; Park and Zhang, 2000; Medina-Muñoz et al., 2003). Traditionally, most of the work undertaken in management enhances the belief in, and commitment to, use of the natural scientific approach to understanding organizational life. Bettis observes that ‘current norms of the field [strategic management] seem strongly biased toward large sample multivariate statistical studies.
This leads to a large database mentality, in which large-scale mail surveys and ready made databases such as Compustat, CRSP and PIMS are often favoured’ (1991, p. 316). This view is supported by Mendenhall et al. (1993) whose research revealed that in the issues of the International Journal of Management between 1984 and 1990, only 14 per cent of articles utilized qualitative approaches, and only 4 per cent used joint methodologies. Concern has been raised that the use of ‘hard’ data sources in management (particularly strategic alliance) research is unlikely to capture the soft core concepts such as motives for alliance formation, partner selection/characteristics, control/conflict and alliance stability/performance, which could be done more effectively through the use of qualitative research (Parkhe, 1993).

Recently there have been calls for management researchers to employ more mixed-method approaches rather than just quantitative or qualitative research. The view is that a combination of research methods can serve mutual purposes because ‘the relative strengths of qualitative and quantitative methods enable management and organisational researchers to address important questions at different stages of a research inquiry’, thereby enhancing and enriching current knowledge by ‘filling in the gaps’ that studies adopting a singular approach are unable to do (Currell and Towler, 2003, p. 524). However, relatively few researchers have adopted mixed-method approaches in management research (Andersson and Bateman, 2000; Bansal and Roth, 2000; Egri and Herman, 2000). The studies that have adopted this approach have taken a variety of forms. For example, Gupta and Govindarajan (1984) used both questionnaire and interviews in their exploratory empirical study of the effects of linking managerial characteristics to strategic business units (SBU) strategy on SBU effectiveness at strategy implementation. Bourgeois III and Eisenhardt (1988) combined observation, interviews and questionnaires to investigate how executives make strategic decisions in industries where the rate of technological and competitive change is so extreme that information is often unavailable or obsolete. Geringer and Herbert (1991) used pre-tested questionnaires followed by semi-structured interviews to confirm responses in assessing international joint ventures’ performance. Other mixed-method research studies into strategic alliances include combining quantitative and qualitative data collection (Thakur and Srivastava, 2000) and the use of interviews and archival data (García-Canal et al., 2002; Yan and Duan, 2003).

Discussions concerning tourism research methodologies have been premised on the origins and epistemology of tourism. There is significant scholarly discussion concerning methodological issues, research orientations and the most appropriate approaches to tourism studies. Citing a number of authors, Echtner and Jamal (1997) conclude that these discussions reveal that tourism scholars are divided in their opinions as to whether tourism should be studied as a distinctive discipline or as an area of specialization within existing disciplines. It has been observed that the academic analysis of tourism and hospitality has eclectic origins (Dann et al., 1988; Downward and Mearman, 2004; Tribe, 1997), which embrace disciplines such as geography, political science, law, economics, philosophy, psychology, sociology anthropology, strategy, human resource management, operations management and marketing. It is this fragmentation of theory, arising from the various disciplines in which tourism researchers were educated, that is an impediment to any efforts to achieve what Downward and Mearman (2004) call philosophical consistency. For this reason, most research in tourism has historically tended to emphasize either ‘quantitative’, ‘qualitative’ or ‘triangulation’ methods without a full philosophical justification. The following discussion centres on a few authors in tourism research who have adopted a philosophical discussion in relation to tourism research.

While Walle (1997) argues that most tourism research lies on a continuum between positivist and interpretive epistemological paradigms, he concurs that techniques which
bear the imprints of logical positivism, statistical investigation and the scientific method continue to dominate research in tourism. In his discussion, Walle (1997) traps himself in the cage of scientism. His view of the scientific method, as a process through which ‘the phenomenon under consideration must be empirically verifiable by both the researcher and larger scientific community’ (Walle, 1997, p. 525) is argued only in the light of positivist methodologies. He finds it difficult to accept interpretative epistemological paradigms as social sciences and refers to them as merely ‘artistic investigation’, which employs ‘less rigorous, but more flexible, tools of investigation’ (Walle, 1997, p. 528). However, his conclusions are important because he argues that, while tourism research involves a series of trade-offs between positivism and interpretivism, with more emphasis on the former, the field of tourism needs to embrace a general recognition of the legitimacy of a variety of research strategies in order to enhance the quest for human understanding.

In contrast to Walle (1997), Jamal and Hollinshead (2001) favour more qualitative research. They question how the dominance of positivism and scientism can be overcome, making a plea that tourism research should undertake more qualitative enquiry because the tools of positivism are not equipped to deal effectively with tourism dynamics. In the view of Jamal and Hollinshead, ‘“[r]eality as it is known is lodged in narrative texts that mediate the real” and truth “is fragile, a co-production, an interactional experience lodged in the moment that connects the reader-as-audience-member and co-performer to a performance text”’ (2001, p. 69) as opposed to some solid and unambiguous ‘truth’ or validity in the scientific/positivist sense. They maintain that qualitative research still struggles to gain legitimacy in several academic disciplines that are oriented towards human social phenomena and this is largely due to the historical baggage of debates and meanings attached to ‘subjective’ and ‘objective’ research approaches. ‘Since “objective” research is a requirement for validity in the natural sciences and those social science domains that pursue the positivistic model, interpretive approaches tend to be banished as “merely subjective”’ (Jamal and Hollinshead, 2001, p. 69). Although in their conclusions they ask for a dialogue in tourism research on multiple approaches, theories, practices, methods and techniques that can assist researchers in tourism, it is obvious that they are biased towards qualitative research and are committed to a qualitative research agenda that would penetrate the ‘forbidden zone’ of qualitative inquiry as opposed to triangulation of methods with a view to initiating new lines of thinking. Most qualitative tourism studies fall under this broad interpretivist paradigm. For example, Anderson and Shaw’s (1999) research in tourism marketing management, Echtner’s (1999) examination of the application of semiotics to tourism studies and Hollinshead’s (1999) Foucauldian study on the power of surveillance in tourism.

Departing from Walle’s (1997) trade-offs in choosing ‘qualitative’ or ‘scientific’ techniques and Jamal and Hollinshead’s (2001) plea to penetrate the ‘forbidden zone’ of qualitative inquiry, Davies (2003) investigates areas of methodology and epistemology concerned with the generation of a framework that embraces both quantitative and qualitative research. Davies (2003) criticizes Walle’s argument that qualitative research lacks rigour compared to quantitative research, that “less rigour” could be interpreted to mean less accurate’ (Davies, 2003, p. 99). He also takes issue with Walle’s idea of trade-offs between quantitative and qualitative research. He argues that, ‘although depending on the situation, the method preferred in the trade-off may have more appropriateness, the method rejected can still generate useful insights’ (Davies, 2003, p. 99). He also criticizes Jamal and Hollinshead (2001) for over-emphasizing qualitative approaches at the expense of an eclectic, holistic research approach.

Davies (2003) sees complementarity of quantitative and qualitative data as important in tourism research and argues for the combination of the two methods in order to develop a
sensible ‘logic of inference’ for tourism. He sees greater possibilities of mixing both methods (quantitative and qualitative) and ‘the mixing of conflicting paradigms on which quantitative and qualitative methods are based’ (Davies, 2003, p. 104). He presents an integrating framework for different paradigmatic approaches, which, in his view, ‘ought to encompass an alternative logic of inference, the changing nature of the business environment, and linking and bridging mechanisms’ although he concurs that mixing paradigms may present serious philosophical obstacles (Davies, 2003, p. 107). However, his framework falls short of addressing the ontological and methodological issues the previous authors addressed.

The other paper that addresses the issue of mixing methods with a view to encompassing ontological and methodological issues is by Downward and Mearman (2004). In their argument, they maintain that clarifying the ontological basis of inferences and yielding a logically consistent triangulation of insights is made possible through embracing a critical realist perspective. While their argument has merits and is mostly valuable to tourism research, they fail to address Echtner and Jamal’s (1997) and Davies’ (2003) concerns for the possibilities of mixing conflicting paradigms on which quantitative and qualitative methods are based. They adopt a critical realist perspective that questions whether Davies’ (2003) and Echtner and Jamal’s (1997) quest for the integration of theories and philosophies from various disciplinary areas in tourism research is feasible. Although Davies makes reference to a developing literature on paradigmatic triangulation based on the work of Geertz (1973), Denzin (1978) and Denzin and Lincoln (1994), this view has been rejected by many authors (Burrell and Morgan, 1979; Chua, 1986; Laughlin, 1995). Paradigms have been defined as ‘world-views that signal distinctive ontological (view of reality), epistemological (view of knowing and relationship between knower and to-be known), methodological (view of mode of inquiry), and axiological (view of what is valuable) positions’ (Sandelowski, 2000, p. 247). They represent a world-view that defines, for its holders, ‘the nature of the “world,” the individual’s place in it, and the range of possible relationships to that world and its parts, as for examples, cosmologies and theologies do’ (Guba and Lincoln, 1998, p. 200). It is therefore doubtful that one can hold multiple world-views.

Without that feasibility, one is inclined to adopt a paradigm, not because it is logically presented but because of the extent to which one agrees with its basic assumptions. There is no ‘perfect’ and ‘universally agreed’ methodology, and there is still great debate about the meaning of science, procedures, protocol and epistemological claims. ‘The rules and procedures for research constantly change as scientists look for new methods and techniques of observation, inference, generalisation and analysis . . . a well-developed research methodology can provide an understanding of the products and processes of scientific enquiry’ (Eldabi et al., 2002, p. 64).

**The Argument for Pragmatism in Tourism and Management Research**

Pragmatism is an distinctive American philosophy (Aune, 1970; Blosch, 2001) traceable to the ‘Metaphysical Club’ – the legendary, short-lived discussion group in Cambridge, Massachusetts, in the early 1870s that brought together many of the ‘founding fathers’ of American pragmatism – Justice Oliver Wendell Holmes, Jr. (1841–1935), William James (1842–1910), Charles Sanders Peirce (1839–1914), Chauncey Wright (1850–75) and Nicholas St. John Green (Stuhr, 2000; Purcell Jr. and Erlanger, 2002) and is also linked to the writings of Mead (1863–1931) (Laughlin, 1995) and other contemporary theorists including W. V. O. Quine, Richard Rorty and Donald Davidson (Murphy and Ricard, 1990; Tashakkori and Teddlie, 1998; Creswell, 2003). Their ideas are essentially
premised on the reflections of the Kantean/Fichte/Dilthy philosophical thought of the ‘projection of our minds’ (Laughlin, 1995, p. 72).

These origins, though not a subject for analysis in this paper, have greatly influenced the shape of studies based on pragmatism. Pragmatism is derived from the Greek word πράγμα (pragma), which means action, from which the words ‘practice’ and ‘practical’ come (James, 2000). Rorty defines pragmatism as ‘the claim that the function of inquiry is, in Bacon’s words, to “relieve and benefit the condition of man” – to make us happier by enabling us to cope more successfully with the physical environment and with each other’ (1991, p. 27). Pragmatism was first introduced into philosophy by Charles Sanders Peirce in 1878 in his article ‘How to make our ideas clear’. However, Baert (2003) argues that to talk about pragmatism does not suggest a unified doctrine with set principles shared by all members, and that differences were present even among the founding fathers. Be that as it may, common themes are identifiable. For example, Menand argues that they – particularly the ‘founding fathers’:

all believed that ideas are not ‘out there’ waiting to be discovered, but are tools – like forks and knives and microchips – that people devise to cope with the world in which they find themselves. They believed that ideas are produced not by individuals, but by groups of individuals – that ideas are social. They believed that ideas do not develop according to some inner logic of their own, but are entirely dependent, like germs, on their human carriers and the environment. And they believed that since ideas are provisional responses to particular and unreproducible circumstances, their survival depends not on their immutability but on their adaptability (pp. xi–xii).

(Menand, cited by Snarey and Olson, 2003, p. 92)

Though pragmatism is fairly recent compared to the other philosophical positions, it has positioned itself as a contending paradigm. Recent debates between Powell’s (2001, 2002, 2003) pragmatist views and those of essentially positivist scholars Durand (2002) and Arend (2003) on the logical and philosophical foundations of the competitive advantage hypothesis show the contending position pragmatism has placed itself in. To show pragmatism’s difference from the two main streams, Powell argues that:

The pragmatist epistemology stands in contrast to prevailing positivist and anti-positivist views of scientific discovery. Whereas positivism emphasizes the objective, law-like properties of a brute reality independent of observation (Donaldson, 1992; Wicks and Freeman, 1998), anti-positivism emphasizes the creative role of active, subjective participants, none of whom owns a privileged claim on truth (Burrell and Morgan, 1979; Astley, 1985; Martin, 1990). Pragmatism, on the other hand, rejects positivism, on grounds that no theory can satisfy its demands (objectivity, falsify-ability, the crucial experiment, etc.); and rejects anti-positivism, because virtually any theory would satisfy them. As such, the pragmatist proposes to reorient the assessment of theories around a third criterion: the theory’s capacity to solve human problems (Rorty, 1989; Stich, 1990). To a pragmatist, the mandate of science is not to find truth or reality, the existence of which are perpetually in dispute, but to facilitate human problem-solving. According to pragmatist philosopher John Dewey, science should overthrow ‘the notion, which has ruled philosophy since the time of the Greeks, that the office of knowledge is to uncover the antecedently real, rather than, as is the case with our practical judgments, to gain the kind of understanding which is necessary to deal with problems as they arise.

(Powell, 2001, p. 884)

Debates on the major distinctions between paradigms centre on methodological issues (Burrell and Morgan, 1979; Chua, 1986; Laughlin, 1995; Tashakkori and Teddlie, 1998, 2003), levels of methodological sophistication and prior theorization, and the emphasis given to a critique of the status quo and the need for change (Laughlin, 1995; Dann et al., 1988). Furthermore, various paradigms differ on the basis of methods, logic, epistemology, axiology, causal linkages and nature of knowledge. Pragmatists do not in any way try
to offer an emancipatory programme as do critical theorists, and, while they agree with positivists/post-positivists regarding the existence of an external world independent of people’s minds, they put emphasis on choosing explanations that best produce desired outcomes.

The leading epistemological ideas in pragmatism are those of ‘belief’, ‘doubt’ and ‘habit’ (Peirce, 1877). For pragmatism, both knowledge and social reality are based on beliefs and habits which are socially constructed by the processes of institutionalization, legitimization and socialization (Berger and Luckmann, 1967; Yefimov, 2003). Yefimov argues that knowledge and social reality are historical because ‘institutions cannot be created instantaneously. Institutions always have a history, of which they are the products’ (2003). Berger and Luckmann (1967, p. 72) argue that it is impossible to understand an institution adequately without an understanding of the historical process in which it was produced. Therefore pragmatists refute the idea that ‘truth’ can be determined once and for all. They see ‘truth’ as a normative concept, just like ‘good’ and maintain that ‘truth is what works’; hence knowledge claims cannot be totally abstracted from contingent beliefs, interests and projections (Howe, 1988, pp. 14–15, as cited by Tashakkori and Teddlie, 1998, p. 28). For example, while James contends that, for pragmatists, ‘truth’ means the same thing as it means in science – that ideas (which themselves are but parts of experience) become true just in so far as they help us to get into satisfactory relations with other parts of our experience, he argues that ‘true’ ‘is the name of whatever proves itself, and good, too, for definite, assignable reasons’ (2000, pp. 197–201). Powell (2001, p. 884) maintains that a true proposition is one that facilitates fruitful paths of human discovery, and should be retained, deployed and improved only as long as it provides a profitable leading. It will be abandoned for more attractive propositions, and be referred to as a failure when ‘it begins to frustrate discovery’. In classical Peirce pragmatism, the way to understand these issues is via a process of enquiry through scientific investigation.

In terms of the mode of enquiry, pragmatism embraces the two extremes normally espoused by positivism/post-positivism and those supported by interpretivists. The former emphasizes quantitative methods as opposed to interpretivists’ qualitative approaches. Not surprisingly therefore pragmatism has been hailed as the foundation of mixed-method research (Tashakkori and Teddlie, 1998; Teddlie and Tashakkori, 2003) and Maxcy (2003) outlines a discussion of the link between pragmatism and the use of mixed methods in the social and behavioural sciences. Mixed-methods studies have been defined as those studies involving ‘the collection or analysis of both quantitative and/or qualitative data in a single study in which the data are collected concurrently or sequentially, are given a priority, and involve the integration of the data at one or more stages in the process of research’ (Creswell et al., 2003, p. 212). A mixed-method study may also be seen as one in which the researcher tends to base knowledge claims on pragmatic grounds and employs strategies of inquiry that involve collecting data either simultaneously or sequentially to best understand the research problem (Creswell, 2003). Different names are used to refer to the same concept of mixed-method studies, for instance, interrelating qualitative and quantitative data (Fielding and Fielding, 1986), between or cross-method triangulation (Denzin, 1970; Jick, 1979), multi-methodology research (Hugentobler et al., 1992), integrating qualitative and quantitative methods (Steckler et al., 1992) and multi-method study (Snow and Thomas, 1994). As Creswell et al. (2003) observe, central to these terms is the thought of combining or integrating different research methods. The use of mixed-method approaches is gathering momentum in the social sciences (Creswell, 2003; Tashakkori and Teddlie, 1998; 2003), in management (Snow and Thomas, 1994; Currell and Towler, 2003) and in tourism (Davies, 2003).

The idea that knowledge claims arise out of actions, situations and consequences rather than antecedent conditions (as in positivism) remains central to most pragmatists, most of
whom are concerned with applications – ‘What works’ – and solutions to problems (Creswell, 2003). Creswell further argues that, instead of methods being important, the research problem is the most important issue and individual researchers have freedom of choice regarding the methods, techniques and procedures of research that best meet their needs and purposes. Pragmatism rejects the forced choice between positivism (including post-positivism) and interpretivism with regard to methods, logic and epistemology. As Tashakkori and Teddlie (1998) argue, pragmatism rejects the either-or dichotomy of the incompatibility thesis as it embraces both points of view and is more oriented towards using both qualitative and quantitative methods. Positivism believes that inquiry is value free while interpretivism believes that enquiry is value bound. For pragmatists, values play an important role in conducting research and interpreting results, and the researcher is advised to accept external reality and choose explanations that best produce desired outcomes.

An Argument for Triangulation of Methods in Tourism Research

While the issue of mixing methods is emerging in tourism, very few authors have attempted to link the debate to philosophical issues. The few who have done so, for instance Davies (2003) and Downward and Mearman (2004), fail to resolve major philosophical problems. Davies’ position fails to address fully the lack of ontological foundation and consequently does not fully resolve the methodological issues at stake (Downward and Mearman, 2004). Downward and Mearman present critical realism as a consistent research programme within which triangulation of both qualitative and quantitative methods can be achieved. While their argument is inspirational, the issue of triangulation of methods is limited by the ideas of critical realism. Realism claims, among other things, that the task of the social sciences is to get access to, and unveil, a social reality (that is stratified and exists independently of people’s perceptions) in all its complexity because, as long as it operates according to the right methods, it is capable of accessing aspects of social reality that may not even be immediately accessible by observations (Baert, 2003). In the views of pragmatists, such an approach is too simplistic and does not understand the social world in its totality. As Baert argues:

the main rationale underlying this [realism] position is that social systems are open, irreducibly so, and to such an extent that researchers cannot anticipate all possible mechanisms, structures or powers that may intervene in the research process. As such, substantial reliance on empirical testing (as falsification and corroboration) is a contentious means of establishing the truth content or cognitive validity of those propositions that state the nature of the existing mechanisms in operation. Likewise, I am highly sceptical about the realist argument that stylised facts (as observed regularities) are an essential step towards uncovering these mechanisms. Why would empirical regularities be a stepping stone towards revealing scientific laws if (as realists claim) various mechanisms are intervening with and affecting the surface level? (Baert, 2003, p. 98)

Pragmatism has been hailed as the best paradigm for justifying the use of mixed-methods research (Tashakkori and Teddlie, 1998; Teddlie and Tashakkori, 2003; Rallis and Rossman, 2003) and considers the research question to be more important than either the method used or the paradigm that underlies the method (Tashakkori and Teddlie, 1998; Teddlie and Tashakkori, 2003).

Methods are like the kaleidoscope – depending on how they are approached, held, and acted toward, different observations will be revealed. This is not to imply that reality has the shifting qualities of the coloured prism, but that it too is an object that moves and that will not permit one interpretation to be stamped upon it.

(Denzin, 1970, pp. 298–9)
Any research method chosen has inherent flaws and the choice of that method obviously limits the conclusions that can be drawn (Scandura and Williams, 2000). It is therefore essential to obtain corroborating evidence from using a variety of methods in order to achieve validity. Mixed methods are therefore a way of achieving this through a triangulation of methods. The idea of triangulation is not new. Denzin defines triangulation as ‘the combination of methodologies in the study of the same phenomenon’ (1970, p. 291). Following Denzin’s (1970) seminal work on triangulation, four kinds of triangulation are identifiable as discussed at length by many authors – data triangulation, investigator triangulation, theory triangulation and methodological triangulation (Denzin, 1970; Jick, 1979; Macdonald and Tipton, 1993). Methodological triangulation is the main focus of this paper – combining dissimilar methods to measure the same phenomenon. The rational for this strategy is that the flaws of each individual method will be compensated for by the counter-balancing strengths of another and, by combining methods, observers can achieve the best of each, while overcoming their unique deficiencies (Denzin, 1970; Amaratunga et al., 2002). Webb et al. argue that:

So long as one has only a single class of data collection, and that class is the questionnaire or interview, one has inadequate knowledge of the rival hypotheses grouped under the term ‘reactive measurement effects’...As long as the research strategy is based on a single measurement class, some flanks will be exposed, and even if fewer are exposed with the choice of the questionnaire method, there is still insufficient justification for its use as the only approach. No single measurement class is perfect, neither is any scientifically useless. (Webb et al., 1966, pp. 173–4, cited by Denzin, 1970, p. 308)

Amaratunga et al. (2002) looked at the strengths and weaknesses of both quantitative and qualitative methods and observed that the essence of a mixed-method approach is: to enable confirmation or corroboration of each other via triangulation; to enable or develop analysis, providing richer details; and to initiate new lines of thinking through attention to surprises or paradoxes, ‘turning ideas around’, and providing fresh insights. Oppermann argues that, by using one method, especially interviewing with closed questions, ‘the data are limited to responses to the given questions and especially the categories provided. Other, possibly more important, categories not included will not be detected and, therefore, the results will be biased towards the preconceived categories provided’ (2000).

Proposed Model for Researching Strategic Alliances in Tourism

The pragmatist idea that knowledge claims arise out of actions, situations and consequences, and are socially constructed by the processes of institutionalization, legitimization and socialization places managerial characteristics and perceptions at the core of any inquiry that seeks to understand organizational life. Pansiri (2005) developed a model for understanding the interplay between managerial characteristics and various strategic alliance practices, i.e. drivers for strategic alliance formation, alliance types, choice of alliance partners, alliance structure and alliance evaluation (for further discussion, see Pansiri (2005)). From this broad understanding, a model for researching strategic alliances in tourism is developed. Figure 1 shows a number of ideas that invite further discussion.

Research Focus

Tourism is a very broad industry, therefore attention could be directed either to the industry in general or to various sectors within the industry. An interesting phenomenon would also be to discover if strategic alliances differ in their design and practice depending on the industry’s
sub-sectors. Figure 1 focuses on tourism businesses. The Australian Bureau of Statistics [ABS] (2000) developed the concept of ‘tourism-related’ industries, defined as those industries whose products are strongly associated with tourism and classified into ‘tourism-characteristic industries’ and ‘tourism-connected industries’. Tourism-characteristic industries have been listed as including travel agency and tour operators, taxi transport, air and water transport, motor vehicle hiring, accommodation, and cafes, restaurant and takeaway food outlets, while tourism-connected industries include clubs and pubs, food manufacturing, automotive fuel retailing, casinos and other gambling services, libraries, museums and arts, and education (ABS, 2000). The ABS further notes that there are a number of significant tourism sectors, such as attractions and meetings and incentives, conventions and exhibitions, which do not fall neatly into the above definitions but consume products from a number of tourism-related industries, together with many other businesses which may derive a smaller, but nonetheless significant component of their returns from visitors or visitor activities. All of those businesses form part of the wider ‘tourism industry.’

**Theory**

The theoretical understanding of alliances is developed within the context of the sectors in question. There are many strategic alliances models. One of those is Evans’ (2001) conceptual five-stage process model of the strategic management processes involved in the formation and evaluation of strategic alliances in the airline sector, which can be used to analyse strategic alliances in general. This model explains a process that involves: (a) the strategic analysis of internal organizational and external environmental ‘drivers’;
(b) strategic formulation which involves postulating and evaluating alternative strategic options, and choosing the option of strategic alliance formation (either with or without equity) participation; (c) consideration of implementation issues including the choice of appropriate partners, structure and scope of the alliance; (d) evaluation of the strategic alliance against selected criteria purporting to measure the success of the alliance; (e) feedback of evaluation of the strategic alliance into the analytical phase so that any changes based upon experience can be incorporated (Evans, 2001, pp. 231–3). To Evans’ model, Pansiri (2005) added a cognitive base focusing on managers’ characteristics and perceptions in order to acknowledge the behavioural orientations that influence managers’ attitudes towards strategic alliances formation and the kinds of information they attend to when individually assessing the potential and currently operational alliances their organizations are involved in.

Wiersema and Bantel (1992), and Hambrick and Mason (1984) argue that managers’ cognitive style influences the perceptual process underlying decision-making. Hambrick and Mason further developed the upper echelon (UE) model for understanding the influence of top managers on organizational strategy. As Figure 1 shows, this approach focuses on observable background characteristics, resting on the argument that they represent key proxies for managers’ cognitive orientation and knowledge base, which, in turn, hold important implications for strategic decision-making. They emphasize such characteristics as age, education, tenure in organization, functional background, other career experiences, socioeconomic roots and financial position (Hambrick and Mason, 1984).

**Research Project**

Research on whatever scale needs careful attention to detail, resources and budgeting. There is need for a comprehensive plan to show how much time and resources would be needed for the project. This is followed by an intense literature review that aims to identify and critically analyse the theoretical issues. This stage is important in the sense that it helps in the identification of research questions, objectives and designing of questionnaires. The literature review continues even during the other stages of the research process. If the study is a longitudinal one, it is important to monitor new publications on the subject. Furthermore, in many countries and universities today, one has to apply for approval or permission to conduct research.6

**Primary Research**

In line with the pragmatist paradigm discussed above, the mixed-method approach is used to conduct research. Many scholars have linked pragmatism with successful mixing of methods (Creswell, 2003; Creswell et al., 2003; Tashakkori and Teddlie, 1998, 2003; Johnson and Onwuegbuzie, 2004; Petter and Gallivan, 2004). Most of the writers of mixed-method work originate outside the discipline of tourism. These include information systems (Petter and Gallivan, 2004), education (Johnson and Onwuegbuzie, 2004), management (Jick, 1979), nursing and health care (Morse, 1991; Sale et al., 2002) and geography (Winchester, 1999). The common themes among these scholars are that pragmatism is the philosophical partner of mixed-method research and that there are many mixed-method designs from which researchers can choose to conduct their work.

Figure 2 illustrates the different approaches to designing mixed-method research that researchers can adopt in their inquiry. Concurrent means that both qualitative and quantitative data collection techniques are used at the same time and analysis of both types of data is done simultaneously, while sequential implies that the researcher conducts either
the qualitative phase of a study and then a separate quantitative phase or vice versa (Tashakkori and Teddlie, 1998) with a view to using the latter technique to assist in explaining and interpreting the findings of the former. For example, where the researcher uses the QUAN → QUAL sequence, the qualitative data collection that follow the quantitative can be used to examine results in more detail (Creswell, 2003).

This process leads to data analysis, which subsequently feeds back to both theory and industry through findings, implications and recommendations. Generating information and new ideas is the whole essence of research and this is in line with pragmatism’s emphasis on applications – ‘what works’ – and solutions to problems (Creswell, 2003). Therefore research improves the theory used for investigation, and, in tourism, it is important that research should enhance the efficiency and effectiveness of the industry.

Conclusions

Most of the research in tourism is highly influenced by positivist research (Davies, 2003, p. 98) amid a growing outcry for triangulation of methods in order to understand the dynamics of tourism. Like the Downward and Mearman (2004) article, the purpose of this paper was to bring to the fore philosophical issues that guide research in tourism and its emerging counterpart, ‘mixed methods’. Its main distinction in relation to Downward and Mearman’s views is that it sees pragmatism as a paradigm whose philosophical basis helps us to understand the strategies of diverse tourism participants and the managerial characteristics which fundamentally influence such strategies. Philosophical discussions are indeed endless. This paper has sought to draw more debate on the issue with particular reference to tourism – a subject that has suffered neglect in the field for too long. The paper shares Downward and Mearman’s sentiments that, if future tourism research is going to move more towards mixing methods, it is imperative that the approach be done under a paradigm that enhances the credibility of the methods adopted, but further widens the debate by introducing pragmatism as another paradigm that could easily yield better research outcomes where mixed methods are to be applied. The other issue that is pertinent in this paper is strategic alliances, another field that is currently capturing a lot of

Figure 2. Mixed method design matrix. Note: ‘qual’ stands for qualitative; ‘quan’ stands for quantitative; ‘->’ stands for sequential; capital letters – ‘QUAL’ and ‘QUAN’ – denote high priority or weight, and lower case letters – ‘qual’ and ‘quan’ – denote lower priority or weight. Source: adapted from (Johnson and Onwuegbuzie (2004), Creswell (2003) and Tashakkori and Teddlie (1998)
investigation from many scholars around the world. The linkage between mixing methods and strategic alliances, collaboration and networking in tourism is fundamental because one single method cannot capture everything. The relationships are very complex. Therefore more debate is needed on these issues. Pansiri (2005) argues that we cannot neglect managerial behaviour in dealing with strategic alliances – again another issue that makes the idea of mixing methods imperative.

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Notes

1 “Institutionalization occurs whenever there is a reciprocal typification of habitualized actions by types of actors. Put differently, any such typification is an institution” (Berger and Luckmann, 1967, p. 72).

2 ‘The institutional world requires legitimation, that is ways by which it can be explained and justified’ (Berger and Luckmann, 1967, p. 79).

3 Socialisation may be defined as the comprehensive and consistent induction of an individual into the objective world of a society or a sector of it. It happens when the individual achieves a capacity of the immediate apprehension or interpretation of an objective event as expressing meaning (Berger and Luckmann, 1967, pp. 149, 150).

4 ‘Those industries that would either cease to exist in their present form, or would be significantly affected if tourism were to cease. For an industry to be classified as ‘characteristic’, at least 25 per cent of its output must be consumed by visitors’ (ABS, 2000, p. 17).

5 Those industries other than those classified as ‘tourism characteristic’ for which a tourism-related product is directly identifiable, and where the products are consumed by visitors in volumes which are significant for the visitor and/or the producer (ABS, 2000, p. 17).

6 For example, the University of Ballarat in Australia demands that any researcher, student or members of staff must submit his/her application to the university’s Ethics Committee for approval, while in the University of Botswana such an arrangement does not exist within the university, but researchers are required by law to make an application to the Office of the President for approval.

References


