The Theory and Practice of Conceptual Research in Tourism

by

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Submitted for the Degree of Doctor of Philosophy

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Declaration

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Summary

There is currently much debate about how knowledge of tourism can, and indeed should, be produced. Tourism knowledge production is criticised as relying too much on Western values and as having limited research methods. Although tourism, as a field of study is considered as having demonstrated a notable “critical turn” in recent years, as evidenced by several books and journals published in response to this trend, the situation is not really as optimistic as it seems to be. This study seeks to redress this issue. The first part of the study—the theory of conceptual research in tourism—contributes to the “methodological turn”. It focused on conceptual research which is an existing research strategy but has been somewhat overlooked in the methodological studies especially in tourism field. The idea originated from the process of identifying the research type and a proper research method for the research question, a process that made concept(s) the primary research object. By reviewing the methodological literature, the rationale and existing definitions of conceptual research were presented and discussed. A sample of 471 tourism journal articles was determined to examine conceptual research in tourism. The quantitative content analysis revealed that conceptual research is somewhat overlooked in tourism research academia. The qualitative content analysis developed a typology of twelve conceptual research by analysing 46 pure conceptual research articles. Based on the discussions and analysis, conceptual research in tourism was defined and nine quality issues of conceptual research were illustrated.

The second part of the study – the practice of conceptual research (i.e. the reinterpretation of sustainable tourism in the light of Confucianism and Taoism) - advocates for the “cultural turn”, which lags behind the “methodological turn”. The twelve conceptual research approaches developed in the first part were applied to analyse the concepts of Confucianism, Taoism and sustainable tourism. The definitions, developments and clarifications of Confucianism, Taoism and sustainable tourism were presented. Eleven Confucian values, three Taoist values and seven existing sustainable tourism principles were abstracted. Then the Confucian and Taoist values were translated to sustainable tourism, resulting in new principles of sustainable tourism and the reinterpretation of sustainable tourism in the light of Confucianism and Taoism.
Acknowledgements

This thesis would not have been possible without the supports of my family, supervisors and friends. Here I would take this opportunity to express my gratitude.

First of all, I want to say “thanks” to my family. Actually, the love they give to me could not be expressed by any words. Thanks to the great love and encouragement they give to me since I was born whether I have good or bad performance. I would not have overcome all the difficulties during this long tough journey of PhD without your supports.

I wish to express my sincere gratitude to my supervisor Professor John Tribe for his excellent guidance and encouragement throughout the entirety of this project. Apart from the academic and intellectual advice, his support in my period of de-motivation due to physical and mental health problems was precious. Thanks also give to Dr Donna Chambers who acts as the co-supervisor of the first half of this research. And thanks to both of you to help me gain the experience of publishing in top journal and presenting at conferences.

In addition, I would like to thank my friends who give me all kinds of support during my research life in the UK. Thanks to Zhiru Shi, Liwen Liu, Guosheng Hu for their companion and happy time spent together. Thanks to Doctor Hongyi Zhang who takes care of my health. Thanks to Hongbing Zhu and Yingting Sun who helped me in gathering data and coding.
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Chapter 1 Introduction and Objectives

1.1 Rationale of the study

Globalisation has shown that it is impossible to understand the world we are living in comprehensively and intensively if we only consider one kind of society or culture (Bentley and Ziegler, 2007). People who originate from different cultures have significant differences in beliefs, ideologies and values. Sociologists suggest that knowledge is not independent of the particular culture or society in which it is produced, but is shaped by it (Tribe, 2004). Language, concepts, and well-formed disciplinary rules, are not universal but vary across time and place so that different cultural ensembles sustain different recipes for truth and knowledge (Tribe, 2006). It is therefore necessary to take account of different cultural factors when generating knowledge about tourism.

As tourism has come to be considered to be the world’s largest industry, and as its significant benefits for economic development have been increasingly recognised, more and more attention has been paid to tourism research, especially in Europe and the USA. This means that most of the knowledge about tourism has been generated based on Western culture and values. In contrast, the tourism industry emerged much later in China, commencing in the 1980s after the reform and opening-up policy. The first bachelor's degree programme in tourism management in China, sponsored by the China National Tourism Administration, began in 1980. Tourism study and research developed slowly since then and is still in a preliminary stage. Notwithstanding this relative weakness of Chinese theorising about tourism, however, if multiple truths about tourism are to be explored it is necessary to take Chinese culture and values into account.

1.1.1 Rationale from the background of tourism knowledge creation

As the study of tourism study has advanced, a debate has arisen about how knowledge of tourism can, and indeed should, be produced (Cole, Hall and Duval, 2006). Tourism is defined by Tribe (1997, p.641) as “the sum of the phenomena and relationships arising from the interaction in generating and host regions, of tourists, business suppliers, economies, governments, communities and environments”. Complex as tourism is, there is a discussion as to whether there is a coherent and clearly identifiable academic discipline centred on
tourism, and how knowledge about tourism as a field of study is generated by scholars within and across academic disciplines (Cole, Hall and Duval, 2009).

Apart from the multidisciplinary (Graburn and Jafari, 1991), interdisciplinary (Holden, 2006) or extradisciplinary (Tribe, 1997) debates about how tourism knowledge is created, the justice of and rationale for this knowledge also has to be questioned. Coles et al. (2009) assert that this questioning is vital to how we come to construct and engineer knowledge about tourism, and for how tourism scholars relate to the world ontologically. In this regard, Cahn (1971) discusses issues related to the nature of perception, the relationship between knowledge and belief, and alternative theories of truth. In respect to tourism, Ayikoru (2009) encapsulates a review of common philosophical paradigms in the social sciences, and how an understanding of their assumptions can be used to select the most appropriate perspective to underpin knowledge production in a given tourism inquiry. Ayikoru (2009) specifically argues that social behaviour, including tourism, is enmeshed in a complexity of differing value systems, beliefs and attitudes.

Tribe (2006) argues that, sometimes, researchers are like lions in the circus, caged by role and constrained by structure, rather than lions in the jungle. He believes that research is conducted in a world where language, concepts and well-formed disciplinary rules already exist. Cole et al. (2009) hold the idea that many present-day tourism research foci require knowledge production that is not intellectually straight-jacketed by disciplinary antecedents, but that scholars tend to limit themselves to what lies within their intellectual “comfort zones”. Since tourism studies are carried out in the humanities and social sciences, the position of the researchers in the production of knowledge has to be acknowledged. Pritchard and Morgan (2007) criticise the discourse of tourism knowledge production by highlighting the crucial role played by the tourism’s academic gatekeepers. Hall (2004) believes this gatekeeper role determines the scope and direction of tourism knowledge. He comments that tourism studies are partly influenced by the relationships that exist within the research community rather than depending solely on objective academic merit.

According to Tribe (2006), tourism knowledge is created through five knowledge forcefields: person, rules, position, ends, and ideology. All these factors may lead to bias or oppression in tourism knowledge production. The entrenched mind of the person who acts as a researcher makes the research inevitably somewhat subjective. The rules in knowledge
production that are accepted and followed by researchers may result in knowledge constrained by limiting paradigms, sacrificing flexible methods. The dominant positions in tourism research give rise to a demotion of the subaltern. The ends indicate that the purpose of the knowledge is never interest-free and thus caters to certain groups. Furthermore, an adherence to one ideology may lead to the oppression and partial exclusion of other world views (Tribe, 2008).

The presence of oppression seems to be commonly agreed by researchers in tourism. The first and most questioned issue is gender oppression. Tourism knowledge is criticised as masculine and heterosexual (Pritchard and Morgan, 2000; Johnston, 2001) since the ratio of male to female authors in tourism and leisure journals is four to one (Aitchison, 2001) and only three of the leading tourism scholars in one “definitive” list are female (Zhao and Ritchie, 2007). Tourism knowledge production is also criticised as relying too much on Western Anglocentric and Eurocentric values (Humberstone, 2004; Tribe, 2010; Ren, Pritchard and Morgan, 2010). Evidence can be found that 77% of journal editors are based in the USA, the UK, Australia, New Zealand and Canada (Hall, Williams and Lew, 2004) and, meanwhile, these are also the top five contributing countries of published papers by the journals (Xiao and Smith, 2006a). Obviously, the values and voices of Others are severely suppressed. And this overlooking of “other knowledge” is attributed to a culture of ethnocentrism (Tribe, 2010).

The gatekeepers in tourism research are therefore characterised as male, first generation scholars grounded in the Western, Anglocentric, traditions and located in business, geography or (in the USA) recreation departments (Ren, Pritchard and Morgan, 2010; Tribe, 2010). Coles et al. (2009) claim that it is time to consider tourism knowledge production beyond the restrictive dogma and parochialism of disciplines. Ateljevic et al. (2005) point out, whilst acknowledging a critical shift in thinking, that limited explicit discussion or guidance on how to undergo the practice of being reflexive in tourism research is offered in tourism discourse. Thus, they urge all researchers to find a common territory and engage in the art of reflexivity, irrespective of the ontological, epistemological and methodological binds.

What efforts have been taken by tourism researchers to encourage critical and reflexive approaches in creating tourism knowledge? In order to encourage critical and reflexive approaches, tourism scholars and researchers have gone through different stages. The early
stage of tourism research concentrated first on economic and then socio-cultural aspects. Research was then devoted to alternative forms of tourism which were potentially more sustainable (Jafari, 2003). The advanced stage of tourism study, which has been referred to as the new approaches stage, has the objective of innovating and diversifying the paradigm-system of tourism (Kuhn, 2001). Referring to tourism study, these orientations can be specific to “Old problems, new approaches”, “New problems, old approaches” and “New times, new tourism studies”. In order to challenge the masculinist dominance, more and more researchers adopt a feminist methodology in creating tourism knowledge. Feminism is addressed by special journal issues, such as the “Gender in Tourism” issue of *Annals of Tourism Research* 1995 and the “Gender Tourism” issue of *Tourism Recreation Research* 2003.

The emerging evidence of critical and reflexive approaches seems to be leading tourism research into a new era. Cooper (2002) claims that tourism research is at an important turning point in its development. Tribe (2005) states that tourism studies has now developed beyond the narrow boundaries of an applied business field and has the characteristics of a fledgling post-modern field of research. More reflexivity and an increasing range of tourism research which considers tourism as an academic field rather than just a business practice may even point to the establishment of “new tourism research” (Tribe, 2005). Ateljevic et al. (2005) also agree that tourism studies as a field is demonstrating a notable “critical turn” – a shift for more interpretative and critical modes of tourism inquiry. Several books and journals have been published in response to this trend. The journal *Tourist Studies* aims to provide a platform for the development of critical perspectives on the nature of tourism (Franklin and Crang, 2001). The book *Qualitative Research in Tourism: ontologies, epistemologies and methodologies* by Phillimore and Goodson (2004) gathers new approaches used in producing tourism research. Furthermore, Ateljevic, Pritchard and Morgan (2007) edited a book named *The Critical Turn in Tourism Studies: Innovative Research Methodologies*. The “critical turn” can be divided into a “methodological turn” and a “cultural turn”. Following this topic, Bianchi (2009) critiques the “critical turn” in tourism studies with regards to power and cultural diversities, arguing that the relationship between tourism and globalisation, capitalism and structural power should be taken into consideration when engaging in critical tourism studies.

Is the situation really as optimistic as it seems to be, however? Can tourism research achieve the promise of the paradigmatic shift in tourism thinking to embrace multiple
worldviews and cultural differences hoped for by Pritchard and Morgan (2007, p.11)? Or can tourism research achieve values-based and transformative perspectives through principles of partnership, reciprocity and respect, as described by Pritchard, Morgan and Ateljevic (2011) in their blueprint of hopeful tourism? Whilst it might not be too difficult to undertake the changes in terms of paradigms and methodologies (“methodological turn”), it is, arguably, really difficult to achieve changes to the dominant cultural values and ideologies (“cultural turn”) in tourism knowledge creation. Although the significance of the challenge to develop tourism knowledge that encompass multiple worldviews and cultural differences is widely recognised (Ren et al., 2010), the effective effort is still very limited. The overlooking of Chinese culture and values is a good example to demonstrate the deficiency of the cultural turn in tourism studies.

When it comes to the freedom to research, there are always debates. A number of tourism researchers view themselves as free agents in research (Tribe, 2010). While there may be freedom to research whatever people are interested in, do all people have equal opportunity for their voices to be heard within tourism academia in a circumstance dominated by academics tribes, universities and departments? As mentioned above, the USA, the UK, Australia, New Zealand and Canada are the top five countries contributing to the published journal papers and editors of the most influential tourism journals (Hall, Williams and Lew, 2004; Xiao and Smith, 2006a). To explore this, Law and Cheung (2008) analysed 2,613 papers published by three leading tourism journals Annals of Tourism Research (ATR), Journal of Travel Research (JTR), and Tourism Management (TM) from the year 1986 to 2006 (see Figure 1.1).
There is no surprise that the top five contributing countries were Western value based, English speaking countries, supporting the evidence of other research. It is surprising that China, as a country with the largest population and more than 1,300 tertiary institutes that offered tourism programmes, ranked only 19th on the contributing list, with only 18 articles (0.69% of 2,613) published (Law and Cheung, 2008). In addition, universities in mainland China are absent from the list of the 20 most frequently contributing universities in the top tourism journals. This evidence demonstrates how extensively Chinese cultural values are overlooked in tourism research. Even if Taiwan is considered as synonymous with Chinese cultural values, the Chinese voice still only account for 2.26% of the total (59 of 2,613).

Since Law and Cheung’s (2008) research was only for articles up to 2006, it was necessary to do a further analysis to see whether there have been changes in recent years. The
author of this thesis therefore analysed the 1,220 papers published by the same three journals from the year 2007 to 2012. The total number of papers from the US, Australia, the UK, Canada, New Zealand and the other European countries is 949.73, which accounts for 77.85% (of 1,220). China improved from 19 to 12 with 21.52 papers published but the proportion is only 1.76% (21.52 of 1,220). This supports the conclusion that tourism knowledge production is still Anglocentric and dominated by researchers from the developed world while voices from the developing countries are suppressed (Tribe, Xiao and Chambers, 2012).

The occlusion of the Chinese voice may be disputed by the good performance of Hong Kong as the 7th contributing countries/regions and Hong Kong Polytechnic University as the 2nd contributing university in the top tourism journals (Law and Cheung, 2008). Hong Kong’s special situation in terms of cultural values and ideology has to be acknowledged, however. Having been colonised by the UK for more than 150 years prior to its return to China in 1997, tourism studies in Hong Kong originated and developed within the period of colonialization and thus in the same system as the UK. The tourism studies undertaken in Hong Kong, therefore, cannot be considered as completely Chinese but as having a relatively Western value base. The simple geographical classification of authors cannot present their cultural basis. Tribe, Xiao and Chambers (2012, p.24) question “the extent to which the topics researched and the philosophical approaches adopted nevertheless reflect the realities and positionalities of these authors as peoples from traditionally marginalised societies? To what extent have these scholars managed to resist the adoption of Eurocentric ways of thinking, knowing and being? Or to what extent is there evidence of emergent hybridities?” Ren et al. (2010) argue that one has to perform research in recognisable ways, to satisfy the dominant recipe in terms of language, writing, value, and ideology, in order to be known and get published. Thus even though authors with Chinese sounding names are not rare, few of them can be deemed as having a Chinese cultural value base. It might be argued, therefore, that only some of the articles by authors from mainland China and Taiwan can be considered as voices representing Chinese cultural values and ideology.

Even though the journal Annals of Tourism Research (ATR) attaches much importance to critical and reflexive approaches: as the founder of the journal Jafar Jafari claims “we should not be gate closers but gate openers” (Tribe and Xiao, 2011), the analysis of the recent volumes indicates that tourism knowledge production is still dominated by researchers from
the developed world while voices from the developing countries are suppressed (Tribe, Xiao and Chambers, 2012). Xiao and Smith (2006) propose a hypothesis that the continued dominance of Western academics in leading tourism journals may be ascribed to the growth of journals focusing on specific region, such as China Tourism Research. There is no evidence to support that statement, however. On the contrary, China Tourism Research is still somewhat Western value based because it was launched by the Hong Kong Polytechnic University in 2005 and was switched to a US based commercial publisher and changed its name to Journal of China Tourism Research in 2008 (Law, Leung and Lee, 2012).

The reason why the “cultural turn” in tourism research lags behind the “methodological turn” may be attributed to two factors. On the one hand, tourism research originates from the Western countries and consequently tourism knowledge production based on Western cultural values has become authoritative and is taken for granted, not only by people from Western countries but also those from non-Western countries. On the other hand, although the oppression of Others is recognised, and critical and reflexive approaches are highly advocated by Western tourism researchers, these efforts are mainly limited to the aspects of methodology and feminism. Tourism knowledge based on non-Western cultural values may be more insightful and effective if created by non-Western researchers.

Unfortunately, the performance of tourism researchers in non-Western countries seems to be not reflexive and innovative enough. Take China as an example. The tourism researchers in China have a tradition of believing the knowledge and approaches created by Western peers (Xiao and Smith, 2006b) and thus lack innovation consciousness. Chinese tourism scholars spend most of their effort on applied research (projects such as tourism planning and marketing) and little attention has been paid to knowledge creation or theory development (Bao, Chen and Ma, 2014). Whilst China is one of the top three downloading countries of ATR articles (Tribe et al., 2012), there is little tourism knowledge created based on Chinese cultural values or a Chinese understanding of tourism. It is ironic that most research on tourism in China published in top journals is done by Western value based researchers. Andreu, Claver and Quer (2010) reviewed 95 papers focused on tourism in China published between 1997 and 2008 in the three leading tourism journals: ATR, JTR, and TM. Given the statement that only mainland China and Taiwan are Chinese cultural value based, only 38 of the 212 researchers are non-Western (Andreu et al., 2010), suggesting Western-produced representations of Others in respect to research on tourism in China.
(Echtner and Prasad, 2003). In order to break through the Western Orientalistic imagination, Yan and Santos (2009) present how Chinese describe themselves, or self-Orientalism, by analysing a tourism promotional video: “China, Forever”. This effort should not be limited to tourism discourse but must also be extended to tourism knowledge production.

This study seeks to redress some of the issues outlined above and contribute to the “cultural turn” of tourism research by encouraging alternative ways of tourism knowledge production. As stated by Hollinshead (2006), the widening of research options in human inquiry is particularly significant for the issues confronted by tourism studies – particularly where multiple truths (i.e., worldviews) contend against each other, meaning that different puzzles and solutions are followed by tourism scholars from different value systems (Tribe, 1997). Traditional Chinese culture and modern Western culture were originally independent from each other (Zhang, 2007), but both have rich but diverse connotations in ways of thinking and views of the world. Therefore, tourism knowledge production should be encouraged to embrace Chinese cultural values as much as Western ones. Specifically in this study, sustainable tourism principles will be reinterpreted and the concept of sustainable tourism will be reconceptualised in the light of Confucianism and Taoism.

This study also seeks to contribute to the “methodological turn” of tourism research. Alternative approaches to the study of tourism have been encouraged by many researchers (Franklin and Crang, 2001; Phillimore and Goodson, 2004; Pritchard et al., 2011). In terms of research methodology, while tourism research is concentrated on quantitative and qualitative methods, conceptual research methods are still absent from the tourism literatures. Specifically this study will launch a research track on a used but overlooked research strategy in methodological studies – conceptual research.

1.1.2 Rationale from the background of traditional Chinese culture

Traditional Chinese culture refers to the general signifying system which originated and developed from China. It is the beliefs and values determining the preference and behaviours of Chinese people. Although Chinese culture has been affected by communism and Western values in recent years, its fundamental elements still work well. Confucianism and Taoism are the two representative branches of traditional Chinese culture (see Figure 1.2). Buddhism is not considered as traditional Chinese culture because it was not originated from China and has been merged with Confucianism and Taoism since it was introduced.
Figure 1.2 Symbols of Confucianism and Taoism

(Source: Internet. From the left to right are the symbols of Confucianism and Taoism)

The most important culture school in China is Confucianism. It delineated so widely that sometimes it is misleadingly confused with Chinese culture itself and Western people tend to associated everything Chinese with Confucianism (Goldin, 2011). Confucianism was founded by Confucius when the society was in disorder and full of contradictions. It originated from the critique and reflection on the mode of society, with the purpose of developing a new stable and harmonious society. Confucianism emphasises the ethical relationships between people and applies them to politics. It is considered to be both a social philosophy and an ethical system. The ultimate target of Confucianism is to achieve the greatest harmony (he in Chinese) within society, comprising the harmonious coexistence between people of various social classes. This can only be achieved through the practice of a series of Confucian values. Confucianism encourages people to practise moral self-cultivation in order to be a person of virtue. Humanity (Ren) is deemed as the highest attainable moral standard of external roles or conducts. Special importance is attached to justice (yi), through the claim that justice is superior to life. Confucianism develops propriety (li) as the socially accepted regulation of proper conduct and good manners for people to follow. The requirements of filial piety ensure harmony within the family. The ethical system plays a role in guiding the behaviours of individuals and how to treat others. In contrast to Western culture, which stresses freedom, rationality, law, rights and individualism, Confucianism emphasises equality, civility, duty and collectivism (Tu, 2000).

Another important value system which has significantly affected the Chinese people is Taoism. It refers to two aspects: Philosophical Taoism a philosophical school and Religious Taoism as a religious belief (Miller, 2003). The word “Tao” originally meant a road for people to pass along, and later it came to mean the “right way”, and then the law and norm by
extension. It is called Taoism because it regards Tao as the supreme substance and the general origin of all things in the world. Tao supplies the physical laws that provide ideal physical models of processes. Tao, in this sense, is both a process and the container and origin of process and the laws of process. It is the natural, internal way of the universe – of Heaven and Earth. Taoism esteems Wu Wei (Inaction), which is no action in violation of the natural laws, or taking action but without bias. The essence of Wu Wei is embodied in three aspects: “not to scramble for it”, “desire control”, and “moderate”. The Book of Zhuang Zi, a Taoist classic, emphasises that nature should be revered, loved and protected. This includes protection of the natural ecological balance. It does not, however, require people to do nothing against the law in face of nature, but to recognise it by way of discovering and understanding its structure and properties. So long as nature is not harmed, people can use it to support their existence.

As stated in previous sections, tourism study was originated and has been developed for decades in Western countries, especially in Europe and the USA. Most tourism knowledge has therefore been generated based on Western culture and values. In contrast, tourism study in China emerged relatively recently and is still in the stage of adopting Western knowledge. As shown above, Chinese culture has its unique values which are still appreciated by Chinese people nowadays. These values are quite different from the Western ones, and offer an alternative way of thinking in terms of generating tourism knowledge, since Western ontologies and epistemologies are not the only way of knowing and (re)interpreting the world (Dann, Nash and Pearce, 1998; Urry, 2002). This study aims to create a different interpretation of sustainable tourism in the light of Chinese cultural values.

1.1.3 Rationale from the background of sustainable tourism

As climate change and other environmental problems arise, sustainable development has attracted more and more interest. Sustainable tourism has been considered as an alternative paradigm for future tourism development (Sharpley, 2000), although there are lots of debates about its rationale and effectiveness (Cater, 1993; Hedren and Linner, 2009). Sustainable tourism originates from its root concepts of “development” and “sustainable development”. Since the concept of sustainability has been translated into tourism by scholars from different perspectives (Holden, 2000), there are varies understandings of the concept of “sustainable tourism”. The definitions of sustainable tourism tend to be at the centre of debates regarding the path to produce a concise or generally agreed one. The arguments about the definition of
sustainable tourism revolve around the emphasis on tourism itself or the role tourism plays for general sustainable development. Apart from the complexity of the concept of sustainable tourism which refers to environmental, economic and social-cultural issues, the failure to arrive at a consensus on the definition of sustainable tourism may be attributed to the different worldviews, interests and ideologies that the definers hold.

According to Butler (1998), the understanding of sustainable tourism should be associated with the value systems and the societies of those involved in it. The current concept and theories of sustainable tourism, however, are generally created based on the Western value system and do not take the Chinese cultural value system into account. This study, therefore, aims to fill this gap and explore sustainable tourism underpinned by Chinese cultural value systems. On the other hand, Hughes (1995) states that sustainable tourism knowledge is created based on the dominant approach which is technical, rational and scientific, with other approaches being overlooked. More research on sustainable tourism should be undertaken with the application of a variety of critical approaches and cultural values in response to the “critical turn” (Bramwell and Lane, 2014). This study seeks to reinterpret sustainable tourism in the light of traditional Chinese cultural values by way of an alternative research strategy—that of conceptual research.

1.1.4 Summary of the rationale

To summarise, tourism knowledge product has been found to rely too much on Western values which are Anglocentric and Eurocentric (Humberstone, 2004; Tribe, 2010; Ren, Pritchard and Morgan, 2010; Tribe et al., 2012). Through an interrogation of the literature, the author found that this applies also to knowledge of sustainable tourism knowledge. The concept of sustainable tourism is a Western concept proposed and interpreted based on Western values. Interesting research questions are: what does sustainable tourism mean in terms of Chinese cultural values? Whilst there are many Western values applied in sustainable tourism, how many of these also apply to the Chinese value system? And what can Chinese cultural values offer for sustainable tourism besides the existing Western understandings? This study is going to explore these questions.

In response to the “cultural turn”, this research focuses on how to interrogate tourism knowledge based on Chinese cultural values. It presents the argument that tourism knowledge could be created based on multiple cultural values rather than being confined to a certain one.
It will explore the use of Chinese cultural values in the generation of tourism knowledge. This research will therefore translate Chinese cultural values to sustainable tourism and offer a Chinese understanding of sustainable tourism. On the other hand, in response to the “methodological turn”, this study concentrates on a type of research strategy which has been used but not well defined—conceptual research. It not only contributes to the understanding of conceptual research, including its definition, classification and approaches, but also provides an example of how conceptual research approaches can be used through the practice of a conceptual research on sustainable tourism.

1.2 Aims and objectives

In response to the “methodological turn” and “cultural turn” of tourism research, two aims of this study are designed which indicate the two contributions. Study One is the theory of conceptual research with aim one to explore the meaning and how it is carried out; Study Two is the practice of conceptual research with aim two to reinterpret sustainable tourism in the light of Confucianism and Taoism. In order to realise the aims, four objectives need to be achieved:

1 To clarify what conceptual research is and how it is carried out in tourism
2a To analyse Confucianism and Taoism and their values
2b To analyse the concept of sustainable tourism
2c To reinterpret sustainable tourism in the light of Confucianism and Taoism

1.3 Research gaps

1.3.1 Previous studies on conceptual research

In contrast with the tremendous amount of literature on quantitative research and qualitative research, conceptual research has been relatively overlooked. Conceptual research is most discussed in psychoanalysis studies, such as Dreher (2000, 2003); Leuzinger-Bohleber (2004); Leuzinger-Bohleber and Fischmann (2006). The conceptual research method is also often used in information system studies (Mora et al., 2008). Squires et al. (2011) figure out the limitations of conceptual research in terms of reliability and validity. Although some conceptual research has been done in tourism studies, no study has sought to clarify conceptual research as an individual research category or investigate how such research might be carried out. This study seeks to fill this research gap both in respect to methodological studies and the specific field of tourism.
1.3.2 Previous studies on Chinese culture and tourism

With the growing economic power of China and the Chinese overseas, the business and management practice of the Chinese have attracted more and more attention. The differences in consumer behaviours and management practices (such as decision making, leadership and so on) between Chinese and Western people have been studied with regard to their cultural elements (Waldie, 1980; Martinsons and Westwood, 1997). Yau (2007) explores the dimensions and marketing implications of Chinese cultural values. Research on the relationship between Chinese culture and tourism is relatively rare, however. Most studies are general discussions about cultural tourism, such as the tourism in respect to the development of the cultural heritage of Confucianism (Yan and Bramwell, 2008), and tourist culture such, as how tourist behaviours are affected by Confucian values (Mok and Defranco, 2000; Arcodia, 2003). Few scholars have linked one specific cultural value, such as Confucianism, to tourism knowledge production. In this context, one remarkable work that can be found is the comparison of the concept of “shengtai lüyou”, based on Chinese culture, and the Western concept of ecotourism (Buckley, Cater, Zhong and Chen, 2008). Besides the literature mentioned above, however, there are few other studies on this issue. This study is going to undertake a profound analysis of what Chinese cultural values can offer for sustainable tourism.

1.3.3 Previous studies on sustainable tourism and cultural values

Although hundreds of studies on sustainable tourism have been published in recent years, the relationship between sustainable tourism and culture has not been afforded sufficient importance. Zepple (1998) links the destination culture to tourism by analysing the relationship between sustainable tourism and indigenous peoples. Other studies are all about how to protect culture as a tourism product and gain sustainability. Little research has been done on exploring the culture’s implication for sustainable tourism knowledge. There is currently no study comparing Western and Chinese cultural values in understanding sustainable tourism. To fill up the gap, this research will explore how Chinese cultural values can contribute to the understanding of sustainable tourism compared to the dominant Western ones.

1.4 Research methods used in the study

It has to be stated that this research is an unusual doctoral study. In contrast to the common doctoral studies that adopt the paradigms of either quantitative or qualitative
research, this study focuses on an overlooked research strategy, namely conceptual research. Since the existing knowledge on conceptual research is limited, the research method selected for Study One should contribute to a better understanding of conceptual research in terms of definition, clarification and approaches. To achieve aim one (to clarify what conceptual research is and how it is carried out), published tourism journal articles are used as the data to analyse and content analysis is adopted as the research method. The quantitative part analyses articles to estimate the amount of, and trends in, conceptual research. The qualitative part develops a typology of popular approaches presented in conceptual research by in-depth analysis of conceptual research articles. The details of this method will be presented in Chapter Three.

Systematic (literature) review and content analysis are selected as the most possible methods for Study Two. Systematic review stresses the process while content analysis contributes to the data analysis. In addition, conceptual research approaches (the twelve themes) are adopted for data interpretation. The process of systematic review is undertaken through five steps: formulating the question, search and inclusion of primary studies, quality assessment, data extraction and analysis, synthesis and interpretation. Two review questions are formulated in step one while the data is identified and the sampling is carried out in step two. The evaluation of qualitative research (reliability, validity and trustworthiness) is adopted for the quality assessment in step three. Qualitative content analysis is adopted for data analysis in step four. Coding is divided into two different processes: the twelve themes of conceptual research, and a coding process for summarising and abstracting the principles of sustainable tourism, the Confucian values and the Taoist values.

On the other hand, as a practice of conceptual research, Study Two adopts the twelve conceptual research approaches (the twelve themes) that were created in Chapter Three. The twelve conceptual research approaches explain well what conceptual research is about and how it is carried out, thus indicating the process of doing conceptual research. This coincides with step five of the systematic review. In other words, the synthesis and interpretation are produced in the form of twelve themes, for example “Defining sustainable tourism”, “Historical analysis of the concept of sustainable tourism” and so on. The details of the process of Study Two will be present in Chapter Four.
1.5 Outline structure of the thesis

As stated above, this study is an unusual doctoral study. Accordingly, the structure of this thesis is different from common format of doctoral studies that include an Introduction, Literature Review, Methodology, Data Analysis, Findings and Conclusions. Instead, the complete research is presented by five sections with ten chapters. The five sections are organised as follows: Introduction, Study One: theory of conceptual research, Methodological and Theoretical Issues for Study Two, Study Two: practice of conceptual research, and Conclusions. Figure 1.3 shows the overview of the research.
The first section, Chapter One Introduction and Objectives, is the introduction chapter which illustrates the rationale and the background of the study. Since this is an unusual doctoral study, the author has here explained the rationale in detail from the perspective of tourism knowledge creation, Chinese culture and values, and sustainable tourism. It explains in detail why and how the research question is proposed. Then the aim and objectives of the study are stated. The research gaps indicate the possible contributions of this study to the relevant research areas. The outline structure shows the process of the study and briefly introduces what each chapter is about.
The second section of the thesis explores the theory of conceptual research (Study One) and contains of two chapters. It builds the theoretical underpinnings for the practice of conceptual research (Study Two). Chapter Two, *Scoping for Conceptual Research*, presents the philosophical position of Study Two and demonstrates that the common research strategies are not suitable, and then proposes an alternative approach, which is a notable gap in methodological studies—conceptual research. The values, definition, classification and limitations of conceptual research are discussed.

To understand conceptual research and conceptual research approaches better, Chapter Three *Understanding Conceptual Research in Tourism* is done in the form of an empirical analysis of conceptual research in tourism. It uses content analysis as the method and CABABS as the way of data gathering. The current situation of conceptual research in tourism is presented and frequently arising issues and approaches are classified into typologies. Then, ten classical tourism conceptual research articles are analysed in depth to test the twelve conceptual research approaches so as to demonstrate that conceptual research does contribute to tourism knowledge development. Based on this analysis, the quality issues and benefits of conceptual research are identified.

The third section of the thesis is the methodological and theoretical issues for Study Two, which contains two chapters. Chapter Four, *Research Design and Method for Use in Study Two*, firstly explains how this study is designed by presenting the conceptual framework. It begins with the illustration of the method adopted by the study. The process of Study Two is presented according to the five steps following the framework of systematic review. The advantages and limitations are then discussed. What is more, the research design is explained in detail, including what the data is, how it is collected, the conceptual framework and the method of sampling. Qualitative content analysis is adopted as the method for data analysis. The process of data analysis is explained, including identification of data, coding and synthesis. Finally, the quality and ethical issues of the study are discussed.

Chapter Five builds the theoretical underpinning for Study Two. It firstly presents the nature of knowledge and the validity of social knowledge, followed by a discussion of the knowledge produced in this study. Then, by analysing the concept of culture, it is found that values are the core component of culture. This informs a further discussion of the concept and nature of values. Compared to the culture dimensions model, cultural values are considered to
be a more effective way to analyse culture in detail, and especially for cultural differences. The existing models of Chinese cultural values are criticised as unsuitable for Study Two while Confucian values and Taoist values are selected.

The fourth section of the thesis is the practice of conceptual research (Study Two). Chapter Six, *Confucianism and its Values*, is a review of Confucianism, including its origin, development, effectiveness and essentials. Firstly, it adopts theme one, *Defining concepts*, to define Confucianism, in the sense of what Confucianism is and what it is not. Then it presents a historical analysis of Confucianism in terms of its origin, development, evolution, rejection and renaissance, with the application of theme three, *Historical analysis of concepts*. Through the interrogation of Confucian classical works and the literature analysing them, both in Chinese and English, eleven key Confucian values are identified and explained through the course of theme nine, *Synthesising concepts*. Chapter Seven, *Taoism and its Values*, explores the knowledge on Taoism with the purpose of extracting its core values. This chapter adopts the same conceptual research approaches as in Chapter Six. Theme one, *Defining concepts*, is used to define Taoism, while *Historical analysis of concepts* (theme three) explores its origin, development and evolution. Key Taoist values are extracted with the application of theme nine, *Synthesising concepts*, through the interrogation of related literature.

Chapter Eight, *The Concept of Sustainable Tourism*, adopts conceptual research approaches to discuss sustainable tourism. Four of the twelve themes are selected. Theme three, *Historical analysis of concepts*, explores the concept of sustainable tourism with regard to how it has originated and evolved based on its parental concepts: development and sustainable development. Theme one, *Defining concepts*, critically discusses and evaluates different definitions of sustainable tourism, and the scope of sustainable tourism with regards to the relationship and differences between sustainable tourism and sustainable tourism development. Theme seven, *Deconstructing concepts*, indicates the cultural and philosophical bias in the interpretations of the concept of sustainable tourism. Theme nine, *Synthesising concepts*, summarises the principles of sustainable tourism based on the relevant literature in order to compare these with the Chinese cultural values.

Chapter Nine *Critique of Sustainable Tourism Using Confucian and Taoist Values* is categorised into Step Five of the systematic literature review process—Synthesis and Interpretation. Two themes from the conceptual research approaches were selected. With the
adoption of theme ten (*Translating concepts to new contexts*), the Confucian and Taoist values are translated to the understanding of sustainable tourism. The theme integrates Confucian and Taoist values into the concept of sustainable tourism and contrasts and compares these with existing principles of sustainable tourism. A reconceptualisation of sustainable tourism in the light of Chinese cultural values is proposed through theme twelve, *Proposing new concepts/Reconceptualisation*.

The last part is the conclusions and reflections. Chapter Ten, *Conclusions*, draws conclusions across the whole research and presents what has been achieved and what the limitations are, as well as providing suggestions for future studies. It reflects on the “methodological turn” of the theory of conceptual research with regards to the definition and clarification of the concept and its approaches. It also reflects on the “cultural turn” of how tourism knowledge can be created based on Chinese cultural value system.
Chapter 2 Scoping for Conceptual Research

2.1 Introduction to Study One

For general doctoral studies, the literature review often follows the introduction chapter, serving to interrogate the relevant literature and present the theoretical underpinnings for the study. As stated in Chapter One, however, this study is unusual in terms of research questions and structure. The second section of the thesis is Study One: theory of conceptual research. It is necessary to explain this briefly before starting Chapter Two. The primary research question of this study is to reinterpret sustainable tourism in the light of Chinese cultural values (Study Two). In contrast to the common studies which aim to solve empirical problems in the tourism field (such as tourist destination marketing, tourist experience, etc.), Study Two focuses on concepts. The consideration and exploration of what research strategy Study Two might be categorised into therefore activates another research question: what is conceptual research and how can it be carried out (Study One). It is for this reason that this study is divided into Study One: the theory of conceptual research, and Study Two: the practice of conceptual research. This will be introduced in detail in section 2.3.2.

Study One contains two chapters. Chapter Two presents the philosophical position of the study and evaluates the fitness of the common research methods for Study Two. The failure to find a proper research strategy for Study Two in the existing research categories led the author to engage in a research strategy that is often overlooked in methodological studies—conceptual research. The rationale, definition and classification of conceptual research is therefore discussed, as well as its position in research. To have a better understanding of conceptual research, Chapter Three investigates conceptual research in the tourism field through a content analysis of published journal articles on tourism. The quantitative content analysis demonstrates the significance of, and trends in, conceptual research. The qualitative content analysis presents the key issues in and approaches to conceptual research, along with a possible typology. Ten classic conceptual research papers in the area of tourism are mapped onto the typology and then analysed in greater depth to illustrate conceptual research in tourism. This achieves objective one of the study.
2.2 Introduction of Chapter Two

This chapter firstly discusses the philosophical underpinnings of Study Two with regards to research paradigms. By analysing the characteristics of the research paradigms and reflecting on the origin of the research question, the philosophical position of Study Two is illustrated. Then the author makes efforts to search for possible research methods for Study Two. After discussing the unsuitability of research methods commonly used in interpretative research (e.g. observation, interview or focus group, ethnography, case study and grounded theory) and popular research methods used by other paradigms (questionnaire and experiment), systematic review and content analysis are proposed as possible methods. Returning to the question, the discussions of a possible research strategy for Study Two are undertaken. By demonstrating how it is different from existing research strategies (experiment, survey, case study, action research, grounded theory, ethnography, and archival research), conceptual research is proposed as an appropriate research strategy for this study. Since conceptual research is overlooked in methodological studies, however, it is necessary to make clear what it is prior to adopting it in this study. Accordingly, discussions on the rationale, definition, classification and limitations of conceptual research are presented. Based on these understandings, the position of conceptual research in research is evaluated from the perspective of common research classifications.

2.3 Philosophical issues of research

Research philosophy aims to clarify the nature and the development of knowledge when embarking on research (Saunders et al., 2009). It is important because how does the researcher views the world influences the way he or she does the research. This relationship is reflected and demonstrated by research paradigms. The common research paradigms are as follows.

2.3.1 Overview of research paradigms

“Paradigm” is a term that originates from philosophical thought and its meaning evolves with the development of human knowledge. According to Kuhn (1962), paradigm means a theoretical perspective that is founded on previous acquisitions and accepted by the community of scientists within a given discipline as appropriate to direct the ensuing research. In light of this interpretation, different disciplines have different research philosophical paradigms. Specific disciplines rarely have a commonly agreed paradigm, however; instead, there are usually multiple paradigms within a given discipline (Corbetta, 2003). Saunders et
al. (2009, p. 118) define paradigm as a certain way to examine, gain, understand and explain social phenomena. Paradigm is also explained to be “an exemplar or exemplary way of working that functions as a model for what and how to do research, what problems to focus on and work on” (Usher, 1996, p. 13).

Almost all the works that discuss the concept of a research paradigm associate it with three basic questions (Bryman, 2008; Jennings, 2001; Gray, 2009). The first one is of “what”: Does reality exist? This is a question from an ontological perspective which concerns the nature of social reality. The second question is: Is it knowable? This is an epistemological question which enquires into the relationship between “who” and “what”. The third one is of “how”: How is the knowledge acquired? This is a methodological question with regards to the technical instruments of the cognitive process. Depending on the answers to these questions, different paradigms are generated. Positivism, postpositivism, interpretivism and critical theory are considered to be the four major paradigms that structure research (Goodson and Phillimore, 2004).

From the ontological perspective, positivism believes the nature of the world is perceived by universal laws and truths: more importantly, that reality is knowable. From the epistemological perspective, the researcher is independent of the research, that is to say, it is totally objective and value free. The methodology of positivism is based on scientific observation, in terms of experiments, verificasion of hypotheses and quantitative data. The methods used are rigid, therefore the research is repeatable by others and same results will be gained by using the same method. Positivism was the most used and dominant paradigm in social science from the 1930s to 1960s (Gray, 2009). Some scholars even hold the opinion that sociology was born under the auspices of positivist (Corbetta, 2003). Postpositivism is the development or revision of positivism in order to overcome its intrinsic limitations. Whilst it agrees that reality is real, it holds that the world is knowable only in an imperfect and probabilistic manner. Its epistemological inquiry is modified dualist which admits that the subject conducting the study may exert an effect on the object of study. The methodology is modified experimental, and qualitative methods may be included alongside quantitative ones.

Although postpositivism addressed some of the limits of positivism, positivism/postpositivism still implies tremendous challenges. Most critiques have been
generated by those thinkers influenced by the interpretive or critical paradigms (Goodson and Phillimore, 2004). Interpretivism argues that the social world should not only be studied by the scientific model but should involve different intellectual traditions, thereby implying a contrasting epistemology to positivism (Saunders et al., 2009). The interpretive paradigm believes that different individuals, groups and cultures construct multiple realities of the world in form and content (Jennings, 2001). The world, particularly the social world, can be understood differently by researchers from different value systems. Thus, the relationship between the researcher and subject is subjective rather than objective. The methodology is empathetic interaction between the researcher and the object studied. The interpretive paradigm mostly uses qualitative methods to gather knowledge from the empirical world.

Critical theory offers quite a different perspective to positivism and interpretivism (Gray, 2009). It argues that the world is organised and dominated by all kinds of power structures, therefore the truths or realities are presented and interpreted based on the interests of dominant groups. As a result, the minority groups lacking real power are under oppression. The epistemological basis of the critical paradigm can be described as “between subjectivism and objectivism” (Sarantakos, 1998). Since research under this paradigm is to make some changes to those being studied, the researchers have to interact with the group being studied. The critical theorists often use a qualitative methodology in order to get below the surface of their subject. Critical theory differs from positivism firstly because it views people as dominating the world rather than following defined natural rules and truths. Secondly, it asserts that research should cause some change rather than find and follow rules. Also, critical theory emphasises the role of values and criticises the interpretive paradigm for ignoring the minority groups being oppressed (Carr and Kemmis, 1986; Jennings, 2001). In fact, there is more than one critical theory for it is always changing and attempts to avoid too much specificity (Kincheloe and McLaren, 2005). Critical theory focuses on power relations and aims to uncover ideological influences (Tribe, 2007). Interdisciplinary, reflective, dialectical and critical are the four principal characteristics of critical theory (Chambers, 2007).

Apart from these four major research paradigms, there are still some others, such as feminist paradigm, postmodern paradigm, chaos theory, etc. The feminist paradigm is sometimes considered to be one form of critical theory (Sarantakos, 1998), but some others view it as being separate (Neuman, 2000). It involves the view that the world is dominated by
men and that subsequently women have been oppressed in producing less distorted knowledge claims (Williams and May, 1996). The postmodern paradigm claims that there are multiple truths and interpretations of reality. It is therefore extremely subjective within which the researchers acknowledge (Jennings, 2001). It is also sceptical of methods and in favour of finding new ways to gain knowledge. Chaos theory is more often adopted in the natural sciences and believes that the world is made up of unstable, non-linear systems (Jennings, 2001).

2.3.2 Philosophical position of the study and reflexivity

In order to demonstrate the philosophical position of this study, it is necessary to explain why and how the study was developed. The original idea of Study Two dates back to 2010, when the author realised that the concept and theories of sustainable tourism were generally proposed and interpreted by Western scholars with little account taken of Chinese understandings. Through a literature review, it was found that research on the relationship between tourism and Chinese culture was limited to cultural tourism and tourist culture. Some researchers (Mok and Defranco, 2000; Arcodia, 2003) propose a linkage between Chinese cultural values and tourism, but only focus on tourism marketing and management. There was a dearth of research exploring the relationship between Chinese cultural values and sustainable tourism. To fill this gap, the author completed an initial study on The Relationship between Confucian Culture and Sustainable Tourism. Confucian culture was selected because it is the most important component underpinning Chinese cultural values. Sustainable tourism was selected because of its close relationship with Chinese cultural values. In preliminary research the author found that the great harmony theory, and the ethical values of Confucianism, could contribute new understanding to sustainable tourism when placed in comparison with Western values. This indicated that Chinese cultural values could be used in creating tourism knowledge.

By interrogating the literature, the author found that Chinese cultural values had been overlooked in the production of tourism knowledge. As for sustainable tourism, most of the knowledge about sustainable tourism had been created by Western researchers and was thus based on the Western values. As indicated in Chapter One, Chinese values are overlooked in academic work on tourism. What is worse, researchers in China tend to adopt the tourism knowledge produced by Western people (Xiao and Smith, 2006b) and, consequently, the knowledge about sustainable tourism in China is mainly a direct translation of the literature
written in English without any attempt to reflect on its congruence or conflict with Chinese cultural values. In order to respond to the critical turn in respect to tourism studies, and especially the cultural turn, this study was designed to contribute to the process of generating tourism knowledge based on Chinese cultural values. The author also noticed that Chinese cultural values were in fact integrated as a consolidated system. Confucian culture is not absolutely independent from Taoism but inextricably interwoven. Based on this observation, the topic was therefore extended to be Reinterpretation of Sustainable Tourism in the Light of Confucianism and Taoism.

A subsequent question that emerged, however, is what kind of research this is. The common distinctions between quantitative and qualitative research do not apply easily to this topic. It is actually a research on a certain concept—sustainable tourism. There is currently limited discussion of this kind of research. In order to proceed, a definition of this kind of research, and an understanding of the approaches that can be used within it, have to be achieved first. This consideration of research approaches can be seen in the light of a particular aspect of the critical turn of tourism studies: the methodological turn, which requires alternative methods of tourism research. Another objective was added to the research design, therefore: to clarify the concept and methods of conceptual research. To reflect this, the title of the study was changed to be: The Theory and Practice of Conceptual Research in Tourism. This positions the research as a methodological study in which sustainable tourism is used as an example of the practice of conceptual research.

As discussed and demonstrated in Chapter One, tourism research is organised and dominated by all kinds of power structures and gatekeepers. The truths about tourism are generally presented and interpreted based on the interests of the gatekeepers as reflected in the situation of tourism publications. This means that the values and voices of Others are somewhat suppressed in tourism study, and Chinese values are one representative of those Others that are overlooked. All these circumstances are consistent with the beliefs of critical theory. The author argues that tourism study should not be dominated by only Western gatekeepers, but that Chinese cultural values should also be adopted in generating tourism knowledge. As for sustainable tourism, the concept and principles are mostly created and interpreted by Western people. In response to this, the author adopts the interpretive paradigm and believes in multiple realities of the world that vary between individuals, groups and cultures. People from different value systems have different understandings of the world,
and of the social world particularly. Tourism, as one field in social science, should be studied and interpreted not only by people from Western value systems but also those from other value systems, including the Chinese value system. The author, therefore, seeks to interpret sustainable tourism in the light of Chinese cultural values, comparing these with the existing Western understandings. It can be seen that this study uses part of the critical theory paradigm to establish the rationale and then adopts the interpretivism paradigm to interpret sustainable tourism in terms of Chinese cultural values.

Critical theory and interpretivism are not in conflict with each other. From the ontological perspective, interpretivism believes in relativism whilst critical theory believes in historical realism. The only difference is that historical realism emphasises the relationship between reality and power. It makes sense, therefore, to adopt both of them in one study. In fact, even conflicting philosophies can be used in one study. Although Guba (1990) claims that an accommodation between paradigms is impossible, the recent prevalence of mixed methods research, which combines quantitative methods (with a positivist philosophy) with qualitative methods (with a constructivist and interpretivist philosophy) disputes his statement. Indeed, epistemological and methodological pluralism is promoted as a means of conducting more effective research (Johnson and Onwuegbuzie, 2004). Gioia and Pitre (1990) demonstrate how to bridge across multi-paradigmatic approaches as a means of establishing correspondence between paradigms and theory-construction efforts. Unlike interpretivism, critical theory takes a sceptical attitude towards the accounts of the researched as representing the truth of the world, or, in other words, critical theory attempts to promote other forms of power rather than only offer a voice to the researched as interpretivism does (Tribe, 2007). The principle of critical theory is to uncover the operation of ideologies and thus to encourage changes to the current situation. Of course, the influence of gatekeepers in tourism research will not be changed solely by the effort of this study, but what this study can do is to offer an alternative voice as to how sustainable tourism can be interpreted in terms of Chinese cultural values following the principles of interpretivism.

Since, from an interpretative perspective, the relationship between the researcher and the researched is subjective, it is necessary to reflect upon the subjective positioning of the researcher. The issues of subjectivity in research are referred to by the term ‘reflexivity’, which is depicted as the capacity of researchers to reflect upon their experiences and values during research projects (Feighery, 2006). Reflexivity encourages researchers to
acknowledge the role that their personal experiences and world views play in their research projects (Ateljevic et al., 2005). Westwood, Morgan and Pritchard (2006) consider the self-awareness and cultural consciousness of the researcher to be an indispensable part of the research process. The personal experience, world views and cultural values of the researcher can influence the selection of research questions, the adoption of research approaches, the generation of findings, and the means of interpretation. Statements in respect to the ontological positions, and previous experiences and values of the researchers can help readers make sense of who the researchers are and how the knowledge that they report was generated (Ateljevic et al., 2005).

Reflexivity, however, is often absent in research. This may be attributed to the misunderstanding that reflexivity is ‘unscientific’ or pretentious and evasive (Feighery, 2006). Hall (2004) points out that some students hesitate to include reflexive statements in their dissertations due to a concern about upsetting examiners who do not support its inclusion. As discussed above, however, for this author reflexivity is important and it is therefore implemented in the thesis. Furthermore, self-reflexivity has been outlined as one of the key tenets for hopeful tourism (Pritchard, Morgan and Ateljevic, 2011) and a requirement of the critical turn (Ateljevic et al., 2005). As stated in Chapter One, this study complies with the critical turn in tourism studies, and therefore reflexivity should be included as an essential part of the thesis. Some critical researchers like Cohen (2013) and Westwood, Morgan and Pritchard (2006) explain how reflexivity should be approached by giving examples of reflections on their own studies.

In fact, the above paragraphs explaining why and how the study was developed could be defined as an aspect of reflexivity. As claimed in Chapter One, conceptual research is identified as the object of this study as a response to the methodological turn, while Confucianism and Taoism is focused on as a response to the cultural turn. The reason for selecting sustainable tourism as the illustrative example of conceptual research is the dominant Western interpretation of that concept. Hall (2004) argues that the fact that little alternative potential for Others has been demonstrated in studies on sustainable tourism may be due to a lack of reflexivity among the researchers. Chambers and Buzinde (2015) figure out that there is no obvious evidence that non-Western people and epistemologies have engaged in the creation of tourism knowledge. In summary, therefore, the tendency for researchers in China simply to accept the tourism knowledge produced by Western
colleagues (Xiao and Smith, 2006b) should be challenged in order to contribute to the creation of tourism knowledge with Chinese cultural values.

The author was born and grew up in the hometown of Confucius (Qufu) where Confucian culture is highly emphasised and therefore acts as an important influence in the formation of the researcher’s world views and values. Furthermore, the author is interested in traditional Chinese culture (including Confucianism, Taoism, Chinese Buddhism, art, literature and so on) and has spent lots of time in learning about this from a young age. This study therefore represents a combination of academic and life interests. As claimed in previous sections, the aim of Study Two is to offer an alternative understanding of sustainable tourism in the light of Chinese cultural values as distinct from Western ones. It complies with the interpretive paradigm which believes in multiple truths among different individuals and value systems. Although the findings and interpretations are generated based on the content analysis of the literature on Confucianism, Taoism and sustainable tourism, the author recognises his subjective positioning. While the author’s personal experience is propitious to the research, it may also influence the questions asked, the literature selected, and the discussion and interpretation produced. This reflexivity helps to produce more trustworthy knowledge rather than abate it.

2.4 Searching for possible research methods for Study Two

Tourism knowledge could be produced with the application of a variety of research methods (Dann, Nash and Pearce, 2006) and there are considerable discussions on the methodological issues in the tourism field (Echtner and Jamal, 1997). Netto (2009) argues that there is no best way or method for the creation of tourism knowledge. Researchers therefore have to choose suitable strategies and methods to their own research projects (Saunders et al., 2009). The most important issue that needs to be considered by the researcher, apart from the research question and objectives, is how the research can be carried out. In other words, what research method can be used in order to achieve the research objectives? Given that Study Two is an unusual research, focusing on concepts and reconceptualisation, the author has to evaluate existing methods to find out whether they can be applied in Study Two or not. In short, the research methods often used in different paradigms need to be interrogated and evaluated in respect to their suitability for this study.
2.4.1 Methods used in different paradigms

According to Corbetta (2003), an important function of a paradigm is to establish acceptable research methods in a discipline. Different paradigms therefore tend to comprise of different research methods. It is essential for the researchers to choose the right paradigm and consequently the research methods for data collection. Although many scholars have presented the research paradigms in terms of ontology, epistemology and methodology, what methods are used by different paradigms is also an important issue that needs to be explored. A combined relationship between the four basic research paradigms and the philosophical items can be shown as Table 2.1.

2.4.2 Evaluation of the unfitness of common research methods for Study Two

Which research method can be used in this study? In other words, how can the data be gathered and analysed? Since this study adopts the interpretivism paradigm, research methods often used by interpretivism (observation, interview or focus group, ethnography, case study and grounded theory) need to be evaluated first. Popular research methods used by other paradigms (questionnaires and experiments) are also evaluated.

2.4.2.1 Observation

Observations are mostly associated with the term “participant observation”. In contrast, the other type observation, structured observation, is often omitted from discussions of research methods. In the book Research Methods for Business Students (Saunders et al., 2009), however, it is illustrated together with participant observation. Structured observation focuses on the frequency of those actions being observed. Good examples of its usage are in the studies of the work of senior managers and the fast food retailer. Gray (2009) claims that there are three advantages of structured observation: the data is more reliable because the results can be replicated either by others or a different time; the data is collected at the same time as it occurs, and data that participants may ignore can be gathered. There is the potential to widen the scope of structured observation with the proliferation of the Internet (Saunders et al., 2009).
<table>
<thead>
<tr>
<th>Item</th>
<th>Positivism</th>
<th>Postpositivism</th>
<th>Interpretivism</th>
<th>Critical Theory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ontology</td>
<td>Naive realism: “reality” is real and universal</td>
<td>Critical realism: “reality” is real and universal but knowable only in an imperfect and probabilistic manner</td>
<td>Relativism: “reality” is multiple and varies among individuals, groups, and cultures</td>
<td>Historical realism: “reality” is shaped by social, political, cultural, economic, ethnic and gender values</td>
</tr>
<tr>
<td>Epistemology</td>
<td>Dualist/objectivist; True results; Experimental science in search of laws</td>
<td>Modified Dualist/objectivist; Probabilistically true results; Experimental science in search of laws with multiple theories</td>
<td>Non-dualism/subjectivist; researcher and the object of study are interdependent; Interpretive science in search of meaning</td>
<td>Subjectivist and objectivist unless postpositivist critical theory is objectivist; Value-mediated findings</td>
</tr>
<tr>
<td>Methodology</td>
<td>Experimental-manipulative; Quantitative techniques</td>
<td>Modified experimental-manipulative; Quantitative techniques with some qualitative</td>
<td>Empathetic interaction; Qualitative techniques</td>
<td>Dialogic/dialectical; Qualitative techniques with some quantitative</td>
</tr>
<tr>
<td>Methods</td>
<td>Experiment, Quasi-experiment, Observation, Questionnaire, Structured Interview, etc.</td>
<td>Experiment, Quasi-experiment, Observation, Questionnaire, Structured Interview, etc.</td>
<td>Participant Observation, Semi-/Unstructured interview, Case studies, Focus Groups, Ethnography, Grounded Theory, etc.</td>
<td>Participant Observation, Unstructured interview, Focus Groups, Delphic Panels, Appreciative Inquiry, etc.</td>
</tr>
</tbody>
</table>

**Source:** This table was developed from the works presented in Guba and Lincoln (1994), Corbetta (2003), Jennings (2001), Jennings (2009), Gray (2009), Jamal and Everett (2007), Bryman, (2008).
Participant observation is a method in which the researcher participates in the group being studied, acting as a member of the group concurrently with playing a role of observer. The participant observer can play the role as a complete participant, complete observer, observer as participant or participant as observer (Gill and Johnson, 2002). The first two roles require the researcher to conceal his/her identity and therefore belong to covert observation. On the contrary, the observer as participant and participant as observer are both exposed to the other members of the group being studied. They are attributed to overt observation. According to Jennings (2001), the advantages of participant observation include: the ability to examine interactions and behaviours in real-world settings; that it is helpful in understanding how participants construct and describe their world; that it tends to refer to the behaviours or ideas that the participants may not discuss, and so on. Nevertheless, participant observation does not work in large groups and lacks temporal comparability. It is also argued to be associated with observer bias in both observations and interpretations.

Can observation be used as the research method for Study Two? The answer is no. Study Two aims to reinterpret sustainable tourism in the light of Chinese cultural values and this cannot be achieved through the observation of behaviours and actions of a group of people. Even if one were to observe Chinese people in the sustainable tourism industry one could not acquire valid information because the topic of Study Two is too conceptual and philosophical.

2.4.2.2 Interviews

An interview is a way of gathering data by a conversation between a researcher and the people who act as participants in the research. Interviews are useful for the examination of people’s feelings or attitudes by talking to the participants rather than filling in questionnaires (Gray, 2009). Interviews may be structured, semi-structured or unstructured (in-depth). Structured interviews use pre-prepared questionnaires and standardised questions. They are utilised in surveys and are often used as a precursor for more open-ended discussions. Semi-structured interviews are often used in qualitative research with non-standardised questions, some of which may be omitted or added according to the different responses of interviewees. They are therefore suitable for exploring questions for which respondents may wish to expand on their opinions (Gray, 2009). Unstructured interviews or in-depth interviews are more like a conversation in that there is no predetermined list of questions and thus minimal control by the interviewer. They are good for exploring a general area in depth and, in
combination with participant observation, for discovering distortions and discrepancies (Jennings, 2001). Semi-structured interviews and unstructured interviews differ from structured interviews because they are underpinned by ontological beliefs in multiple realities and a subjective epistemology. The researchers choose one of these three approaches depending on their research objectives and the characteristics of the phenomenon being studied (Corbetta, 2003). There is another type of interview, called a focused interview or focus groups, which is mostly semi-structured. This involves several people and focuses on a specific topic or issue. It is time saving but requires the participants who are interested in discussing a certain issue with the other group members. The conversation may however be dominated by strong personalities and digress from the focus of attention.

Study Two seeks to explore how sustainable tourism may be understood in terms of Chinese cultural values and thus, at first glance, it might be thought possible to realise it by interviewing some Chinese people. In practice, however, there is a dearth of qualified interviewees; i.e. individuals who are both familiar with sustainable tourism and who know Chinese culture very well. Such individuals are only likely to be found among Chinese scholars of tourism, who are also experts on Chinese culture. This is an unusual combination and implies a very small pool. What is more, as indicated in Chapter One, Chinese tourism scholars are still at the stage of believing and directly accepting the knowledge and approaches produced by Western people (Xiao and Smith, 2006b) which means few of them have considered the relationship between sustainable tourism and Chinese cultural values. Even if the author were able to find enough interviewees, therefore, they might not be able to offer sufficient useful ideas on the topic. Interviews were therefore rejected as a suitable method for Study Two.

2.4.2.3 Ethnography

Ethnography is often used in order to describe and interpret the social world it aims to study. In order to realise this purpose, the researcher is required to immerse herself or himself as far as possible in the context to be researched (Saunders et al., 2009). Ethnography concentrates on the close observation of social practices and interactions. It is not surprising that sometimes ethnography is confused with participant observation because both of them involve the researcher being immersed in a group for a period of time, and entail behaviour observation, a record of conversations and the discussion of questions (Bryman, 2008).
Ethnography denotes not only a research process but also the written outcome of the research. It is best for research with the purpose of exploring cultural phenomena.

Ethnography is not suitable for used as the research method for Study Two for the following reasons. Although ethnography is good for studies aiming to understand the culture and behaviour of a group, the aim of this study is not only to understand Chinese culture but more importantly to combine this understanding with sustainable tourism. Even though the author could immerse himself in the Chinese sustainable tourism industry, ineffective and insufficiently profound ideas on the topic would be gained, for the same reasons as participant observation above.

2.4.2.4 Case studies

The case study is defined by Yin (2003, p.13) as “an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident”. It is used to examine a phenomenon in a certain context and the relationship between them (Gray, 2009). This relationship is not clear, in contrast to the experimental method where the research is undertaken within a highly controlled context. Compared to surveys, case studies are able to achieve a better understanding of the context (Saunders et al., 2009). Case studies are different from ethnography and participant observation, although they may use them as part of the method for gathering data (Jennings, 2001). These differences are presented in Table 2.2 by Gary (2009), adopted from COSMOS Corporation in Yin’s (2003) work.

Table 2.2 Selection Criteria for Different Research Strategies

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Form Of Research Question</th>
<th>Requires Control Over Behavioural Events?</th>
<th>Focuses On Contemporary Events?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Experiment</td>
<td>How, why</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Survey</td>
<td>Who, what, where, how many, how much</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Case study</td>
<td>How, why</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>


Case studies are often classified into four types depending on how many cases are involved and the scope: single/holistic case, single/embedded case, multiple/holistic case and multiple/embedded case (Yin, 2003). Holistic means the case is examined at a holistic and
comprehensive level rather than individual elements within it. If a number of different units of analysis are selected, it is embedded. Case studies are also sometimes associated with the terms exploratory, descriptive and explanatory (Yin, 1994) or intrinsic, instrumental and collective (Stake, 1995). The process of a case study is divided into seven steps: Developing a theoretical stance, Selecting cases, Designing and piloting research tools, protocols and field procedures, Conducting a case study or multiple studies, Creating a case study database (optional), Drawing cross-case conclusions and Writing the case study report (Gray, 2009). Similar to the other methods, case studies have pros and cons. The advantages include the fact that in-depth data can be collected on a single case or multiple cases; the data can be checked for accuracy and palatability; evidence is grounded in the social setting; and member checking may remove research bias (Jennings, 2001). It is also criticised for the fact that the focus of the case study emerges during the study rather than being clearly stated at the outlet; the process is subjective, and evidence may not be reproducible due to the use of member checking (Jennings, 2001).

Although case studies can achieve a richer and deeper understanding of the context of the research, it is not a suitable research method for Study Two. The aim of Study Two is not to understand the circumstances of sustainable tourism in China, but to analyse the existing Western concept of sustainable tourism, as well as Chinese cultural values, and then to find out their compatibility. This aim cannot be realised through the analysis of one or several cases of sustainable tourism in China. In addition, the tourism industry in China is still in the initial stage of development, or in other words the stage which is only concerned with economic benefits and which thus gives little consideration to sustainable development. Therefore, it is difficult to find mature sustainable tourism destinations in China.

2.4.2.5 Grounded theory

Grounded theory is a method that produces theory based on the interaction between data collection and analysis (Strauss and Corbin, 1994). It is not only a strategy for research but a way of analysing data (Punch, 2005). It is helpful in predicting and explaining behaviour, and developing and building theory (Goulding, 2002). The most striking difference between grounded theory and other methods is that the data is collected before the creation of a theoretical framework (Saunders et al, 2009). Rather than testing the theory through data collection and analysis, grounded theory develops the theory from the data. Data is explored using the ideas of researchers through early analytic writing, and is thus seen in fresh ways.
The basic grounded theory is undertaken in the process of reading (and re-reading) a textual database and identifying variables as well as their interrelationships. Charmaz (2006) claims that grounded theory is used to construct a theory “ground” in the data itself through the analysis of qualitative data, and he indicates that grounded theory should begin with a research question and data collection. Then, the data is separated, sorted and synthesised through qualitative coding. Memos about the codes are generated from the preliminary analytical notes and they are then compared, at which point some other relative ideas about the data may occur to the researchers. The following work is sorting and writing. This sorting is the conceptual sorting of memos according to the relationships between concepts. It often generates more memos and sometimes may require the collection of more data. Then the process is repeated. The last work of grounded theory is the literature review which analyses and integrates relevant existing literature into the theory generated by the researcher.

Grounded theory is predicated to qualitative data and informed by the interpretive or constructivist paradigm (Jennings and Junek, 2007). Charmaz (2006) indicates that the grounded theory method should be viewed as a set of principles and practices, rather than prescriptions or packages. Grounded theory is considered to be a useful research method for theory production rather than re-conceptualisation. Grounded theory enables the data collection prior to the theoretical framework and thus literature is reviewed after data collection. But for Study Two the literature which refers to the principles of sustainable tourism and Chinese cultural values are in fact the source of data, and thus the literature review and data collection are undertaken simultaneously. Furthermore, the aim of Study Two is to reinterpret sustainable tourism in the light of Chinese cultural values, rather than construct a theory. Both the aim and process are thus different.

2.4.2.6 Questionnaires

The questionnaire is a widely used research method, especially with surveys. Questionnaires are a data collection method in which the relevant participants are asked to respond to the same set of questions. Questionnaires are divided into self-administered (self-completion) questionnaires in which the participants complete the questionnaires on their own (using the Internet or intranet, mail, or are delivered by the researchers face-to-face) and interviewer-administered questionnaires, which are carried out face-to-face (structured interview) or by telephone (telephone questionnaire). Structured interviews are recorded by the interviewer so that the respondents do not need to write anything. The response rates are
higher than telephone interviews and this type of interview is effective for asking open questions. Also, face-to-face interaction can use cards and visual images and observations can be done at the same time. They are more expensive and time consuming, however. Respondents may be directed to the answers that the interviewer expects or feel inhibited from expressing their real opinions (Jennings, 2001).

The reason why questionnaires are an unsuitable method for this research is the same as for the rejection of interviews; i.e. the lack of sufficient respondents. In addition, questionnaires are not suitable for collecting the deep understandings or ideas of people on a complicated topic like that of Study Two.

2.4.2.7 Experimental and quasi-experimental methods

Experimental and quasi-experimental methods are often used to understand natural and social phenomena. An experiment is defined as “a form of experience of natural facts that occurs following deliberate human intervention to produce change; as such it distinguishes itself from the form of experience involving the observation of facts in their natural settings” (Corbetta, 2003, p. 94). The purpose of an experiment is to find out the links between two or more dependent or independent variables (Hakim, 2000). In a classic experiment, there are at least two groups, an experimental group within which there is some form of planned intervention, and a control group without the intervention. Some research, however, is carried out based on only one group, aiming to observe people’s reactions before and after a certain intervention. A quasi-experimental method is used in research that takes existing groups (ones that experience the treatment in their own natural settings) rather than drawing on random samples (Gray, 2009). The behaviour of the natural group is compared with a similar group without the investigated experience.

The purpose of Study Two is to reinterpret sustainable tourism rather than to find out the links between two or more dependent or independent variables; it is therefore not an experiment but conceptual research. The objectives cannot be achieved by observing an experimental group or contrasting different groups. This means that experimental and quasi-experimental methods cannot be used as the research method for Study Two.
2.4.3 Evaluation of possible methods for Study Two

After rejecting the above common research methods, the author has to think carefully about what kind of research method is needed for Study Two. The research method suitable for one study depends on the characteristics of the aim and data needed for the study. In order to achieve the aim of Study Two, the principles of sustainable tourism and Chinese cultural values need to be collected as data. As discussed above, it is unrealistic to get the data through respondents. There is quite a lot of published literature on sustainable tourism and Chinese culture, however, and the principles underpinning this work can be extracted from these studies. The method required for Study Two, therefore, has to be related to literature. Given the above interrogation of possible research methods, a systematic literature review and content analysis are selected as the most possible methods for Study Two.

2.4.3.1 Systematic literature review

A systematic literature review is a process of the identification, selection, evaluation and synthesis of the available research with regard to a particular research question (Kitchenham, 2004). Aveyard (2010) defines systematic review as “a review of a clearly formulated question that uses systematic and explicit methods to identify, select, and critically appraise relevant research, and to collect and analyse data from the studies that are included in the review” (p.4). It summarises the methods used and the findings of the relevant research, as well as evaluates their differences, and the limitations of current knowledge (Cook, Mulrow and Haynes, 1997). A critical consideration of studies is an integral part of the reviewing process. This would include an appropriate critique of methodological issues relating to the work reviewed, although these are discussed mainly with regard to the area of inquiry in general (Fink, 2010). The process is the most important element of a systematic review, compared to the methods that are used to analyse and interpret data. According to Pai, McCulloch, Enanoria and Colford (2004), the process of systematic review can be divided into five steps: “formulating the review questions, search and inclusion of literatures, quality assessment, data analysis, and synthesis and interpretation” (p.16).

Systematic reviews are characterised by being objective, systematic, transparent and replicable. They involve a systematic search process to locate studies which address a particular research question, as well as a systematic presentation and synthesis of the characteristics and findings of the results of this search. The criteria for inclusion and exclusion in the review are objective, explicitly stated and consistently implemented such that
the decision to include or exclude particular studies is clear to readers and another researcher using the same criteria would likely make the same decision. This explicit approach aims to minimise bias. Systematic reviews can be undertaken either quantitatively or qualitatively. A quantitative systematic review focuses on a body of quantitative literature and is normally used to answer a very tightly-focused question. Qualitative systematic reviews, meanwhile, focus on a research question that is compatible with an interpretative approach and involves producing novel and integrative interpretations of a body of qualitative literature. Systematic reviews have been used as a research method in tourism studies in recent years, for example on methods of sports tourism research (Weed, 2006), on outbound tourism from China (Keating and Kriz, 2008), and on geographical contributions to the study of tourism (Hall and Page, 2009).

Study Two requires identifying, selecting, evaluating and synthesising literature relevant to sustainable tourism and Chinese cultural values and is therefore a suitable study for a systematic review. Details of how the systematic review method is adopted in Study Two will be presented in Chapter Four. As indicated above, however, the process is the most important element of systematic review comparing to the methods that are used to analyse and interpret data. This means that a systematic review is very effective for data identification and collection but weak in analysing that data. It is necessary to find another data analysis method to enhance the reliability and validity of the study. Content analysis is considered for this.

2.4.3.2 Content analysis

Generally speaking, content analysis, or textual analysis, is a research method that examines words or phrases. Content analysis is viewed as a product of the electronic age since its origins are associated with communications (Palmquist, 1980). According to Berelson (1952, p.18), “Content analysis is a research technique for the objective, systematic, and quantitative description of the manifest content of communications”. This indicates that content analysis, through the use of rules to produce quantitative accounts of the raw data in categories, is rooted in the quantitative research strategy (Bryman, 2008). A broader definition was proposed by Holsti (1969, p.14) as "any technique for making inferences by objectively and systematically identifying specified characteristics of messages". It was extended to other areas in social science rather than restricted to the domain of communications. It is currently used in almost all the fields in social science, and across a broad range of texts such as books, essays, journal articles, interviews, photographs, the
content of newspapers, historical documents, speeches, advertisements and so on (Palmquist, 1980; Smith, 2010).

Two commonly agreed features of content analysis are objectivity and being systematic. Content analysis is considered to be objective because the procedures for assigning and categorising the raw materials are transparent, thereby reducing the researchers’ biases to a quite low level. Since content analysis has very clear rules of categorisation, which is thus performed in a consistent manner, it is a systematic method. This means that content analysis is replicable and can be undertaken by anyone who employs the rules to, hopefully, come up with the same results. It is such a flexible method that sometimes it is not considered to be a research method but an approach to the analysis of documents and texts instead of a means of generating data (Bryman, 2008).

The first work to do when undertaking a content analysis is to make clear the research questions. Six questions need to be answered with respect to content analysis (Krippendorff, 2004, p.34): “

- Which data are analysed?
- How are they defined?
- What is the population from which they are drawn?
- What is the context relative to which the data are analyzed?
- What are the boundaries of the analysis?
- What is the target of the inferences?”

After defining the research questions, it is time to consider what is to be counted, or in others word, what is the rule of categorisation. The rule is determined by the nature of the research questions. According to the rule, raw materials are separated into “units of analysis” or “coding units”. Krippendorff (2004) puts forward three kinds of units that are used in content analysis: sampling units (words, sentences, or paragraphs of different meanings), context units (physical limits on what kind of data is recorded) and recording units. Then, the analysis and interpretation can be undertaken according to the units. Content analysis is categorised into conceptual analysis, which concerns the existence and frequency of concepts, and relational analysis which focuses on the relationships between concepts (Palmquist, 1980). A comparisons of these two types is presented in Table 2.3.
Table 2.3 Comparison of Types of Content Analysis

<table>
<thead>
<tr>
<th>Types of Content Analysis</th>
<th>Main Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>conceptual analysis</td>
<td>a concept is chosen for examination and the number of its occurrences within the text recorded, define implicit terms before the beginning of the counting process, begins with identifying research questions and choosing a sample or samples, code data into categories, specialised dictionaries are used to limit the subjectivity in the definitions of concepts</td>
</tr>
<tr>
<td>relational analysis</td>
<td>builds on conceptual analysis by examining the relationships among concepts in a text, initial choices with regard to what is being studied and/or coded for often determine the possibilities of that particular study, from 1 to 500 concept categories, many techniques available and researchers can devise their own procedures according to the nature of their project, time consuming even though has achieved a high degree of computer automation</td>
</tr>
</tbody>
</table>

Source: adapted from Palmquist (1980, p.23)

According to Stemler (2001), content analysis is particularly meaningful for relying on the coding and categorising of the data. It is commonly regarded as word-frequency counting, i.e. the words that reflect the greatest concerns. Sometimes, however, the aim of content analysis is to identify the importance or potential interest using simple word frequency counts. It can be concluded that conceptual analysis mainly involves quantifying and tallying the presence of a concept or word which is chosen for examination, and that relational analysis goes further by exploring the relationships between the concepts identified. Another outstanding feature of content analysis is its usefulness for examining trends and patterns (Stemler, 2001). Since it is easy to divide the raw materials into categories by time period, content analysis is able to answer questions like “how far does the amount of coverage of the issue change over time” (Bryman, 2008, p.128). As with the other research methods, whilst content analysis has a lot of advantages, both theoretical and procedural disadvantages exist.
These are illustrated in Table 2.4. Researchers who use content analysis have to be aware of these and try to maximise the advantages and minimise the disadvantages.

The objectives of Study Two can only be achieved based on the analysis of a series of relevant literature. As an approach to the analysis of texts, content analysis is therefore perfectly suitable for the data analysis method of Study Two. The literature to be analysed is the books and journal articles relevant to the topics under consideration, and this format of data falls within the range of texts suitable for content analysis. In summary, the systematic review enables the literature to be systematically identified and selected, and content analysis enables the analysis of that literature to be systematic and objective. The concepts of sustainable tourism, Confucianism and Taoism, as well as their principles, can be abstracted from conceptual analysis. Furthermore, the relationship between sustainable tourism and Chinese cultural values can be examined through relational analysis. The detailed process of how content analysis is used in Study Two will be demonstrated in Chapter Four.
<table>
<thead>
<tr>
<th>Advantages of Content Analysis</th>
<th>Disadvantages of Content Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Longitudinal analysis can provide valuable insights over time/trend</td>
<td>can be extremely time consuming</td>
</tr>
<tr>
<td>can be used to interpret texts for purposes such as the development of expert systems (since knowledge and rules can both be coded in terms of explicit statements about the relationships among concepts)</td>
<td>is subject to increased error, particularly when relational analysis is used to attain a higher level of interpretation</td>
</tr>
<tr>
<td>provides insight into complex models of human thought and language use</td>
<td>is devoid of theoretical base, or attempts to liberally draw meaningful inferences about the relationships and impacts implied in a study</td>
</tr>
<tr>
<td>is transparent so that replications and follow-up studies are feasible</td>
<td>is inherently reductive, particularly when dealing with complex texts</td>
</tr>
<tr>
<td>is an unobtrusive means of analyzing interactions</td>
<td>tends too often to simply consist of word counts</td>
</tr>
<tr>
<td>is highly flexible to be applied to a variety of unstructured information</td>
<td>often disregards the context that produced the text, as well as the state of things after the text is produced</td>
</tr>
<tr>
<td>can allow information to be generated about social groups to which it is difficult to gain access</td>
<td>can be difficult to automate or computerize</td>
</tr>
<tr>
<td>can allow for both quantitative and qualitative operations</td>
<td>can only be as good as the documents on which the practitioner works</td>
</tr>
<tr>
<td>allows a closeness to text which can alternate between specific categories and relationships and also statistically analyses the coded form of the text</td>
<td>is difficult to ascertain the answers to “why” questions</td>
</tr>
<tr>
<td>is considered as a relatively &quot;exact&quot; research method when done well</td>
<td>synonyms may be used for stylistic reasons throughout a document and thus may lead the researchers to underestimate the importance of a concept</td>
</tr>
</tbody>
</table>

**Source:** adapted from (Palmquist, 1980; Weber, 1990; Bryman, 2008; Smith, 2010)

### 2.5 Searching for a research strategy for Study Two

Since the possible research methods of Study Two have been identified, the author has to return to the former basic question: what kind of research is Study Two? In order to determine the nature of Study Two, it is necessary to consider the existing research strategies and evaluate whether Study Two can be categorised into them or not. Seven research strategies have been identified including experiment, survey, case study, action research,
grounded theory, ethnography, and archival research (Saunders et al., 2009). Experiment, case study, grounded theory and ethnography have already been discounted as suitable research strategies for Study Two in the above sections. Now is the time to discuss the questions of whether Study Two is a survey, action research or archival research.

2.5.1 Survey

A survey is “a technique of gathering data by questioning, those individual who are the object of the research, belonging to a representative sample, through a standardised questioning procedure, with the aim of studying the relationships among the variables” (Corbetta, 2003, p. 117). Whether questionnaire, structured interview or observation methods are used, a survey is a systematic data collection technique. According to the objectives, surveys can be classified as descriptive, explanatory (analytical), predictive or evaluative (Babbie, 1990). Descriptive surveys describe the population in order to find out “who”, “what” and “how”. National censuses are good examples of descriptive surveys. Explanatory surveys are suitable for hypothesis testing. Predictive and evaluative surveys are most used in the business field to help managers evaluate performance or formulate strategy for the future (Jennings, 2001). The advantages of surveys are that they are able to collect data quickly, maintain an objective epistemological position, are less expensive but have a wider geographical distribution than semi-structured or in-depth interviews (Sarantakos, 1998). Also surveys are criticised for their restrict answers, failure to gather in-depth data, for being an intrusive form of data collection and for a lack of reciprocity (Sarantakos, 1998; Killion, 1998). For this research, the objectives of Study Two are concepts rather than a certain group of individuals. It aims to reinterpret sustainable tourism in the light of Confucianism and Taoism rather than to find out “who”, “what” and “how”, to test hypotheses or to make decisions regarding future trends or evaluate the performance or strategy. Study Two is therefore not a survey.

2.5.2 Action research

Action research is not only concerned with analysing the world but also changing it (Gray, 2009). It is used to instigate changes in an organisation and then gain some improvement. The action and research are undertaken simultaneously since the researcher is involved in the research process as a change agent with the purpose of studying and improving the organisation (Coghlan and Brannick, 2004). Another feature of action research is that the data is generated from the direct experiences of research participants. Cooperative
inquiry, participatory action research and action inquiry are the approaches often used (Reason, 1994). Action research is applauded for its participatory nature in real-world contexts, and the vested interest of participants in the research process outcomes. Another advantage of action research is its focus on improving organisational practices, conditions and processes, since it is concerned with finding solutions to problems. The disadvantages, however, are that the outcomes are too organisation specific, time consuming, and the use of the deficit model (Jennings, 2001). Study Two does not refer to any organisation or any participant and thus it is not action research.

2.5.3 Archival research

Archival research is research that uses administrative records and documents as the data source (Saunders et al., 2009). The records and documents can be recent or historical (Bryman, 2008). An archival research strategy is suitable for research questions that concentrate upon the past and changes over time. The disadvantages of archival research are the risk of missing the data suitable for the research objectives and failure to get access to the data (Saunders et al., 2009). Although the source of data for Study Two is the existing books and journal articles on sustainable tourism and Chinese cultural values, they are not administrative records and documents. In addition, the research question does not focus on the past and changes over time; therefore Study Two cannot be categorised as archival research.

2.6 Conceptual research—a research strategy overlooked in methodological studies

Although so many attempts have been undertaken, the methodological position of Study Two is still opaque. What is the nature of Study Two? In order to answer this question, a more basic question that needs to be clarified is: What is research? Walliman (2005) argues that the term “research” is sometimes used incorrectly. He claims that for a work to be research there must be a clear purpose and systematically collected data with interpretation. Saunders et al. (2009) define research as “something that people undertake in order to find out things in a systematic way, thereby increasing their knowledge” (p.5). According to the Frascati definition (OECD, 1993): “Research comprises creative work undertaken on a systematic basis in order to increase the stock of knowledge, including knowledge of man, culture and society, and the use of this stock of knowledge to devise new applications”. Research can be separated into types according to different perspectives.
Study Two has a clear purpose of reinterpreting sustainable tourism in the light of Chinese cultural values. The data will be collected systematically with interpretation and the stock of knowledge of sustainable tourism, Confucianism and Taoism will be increased. It is no doubt a piece of research according to the definitions. Since Study Two does not fit the scope of the existing research strategies, what is it? Note that the objects of Study Two are concepts, and the research question cannot be answered in a traditional empirical way, using quantitative or qualitative methods. This indicates that Study Two applies a research strategy that has been overlooked in methodological studies—that of conceptual research.

2.6.1 The overlooking of conceptual research

Whilst people who are doing research are all familiar with expedient, survey, case study, action research, etc., research that concentrates on concept(s) -conceptual research- is relatively beyond many people’s knowledge. What is conceptual research, therefore? What is its relationship with empirical research and other research? What methods are commonly used for this kind of research? What are its benefits and limitations? Although the term is used sometimes by scholars in books or journal articles, there is no clear definition of the term in methodological studies. People may have difficulties in understanding the term “conceptual research” and thus have confusions about the relationships between conceptual research and other research. These questions will be clarified in the following parts.

2.6.2 What is a concept?

Before engaging in defining conceptual research, it is necessary to make clear what a concept is. According to Cambridge Dictionaries Online (n.d.) a concept is simply “a principle or idea”. But for Locke (1847) a concept is more than an idea. It is a general idea. It is formed through abstraction and the discarding of uncommon characteristics from individual ideas and collecting those ideas with common characteristics. Nietzsche (1954, p. 46) helps clarify this by explaining how concepts originate “through our equating what is unequal. No leaf ever wholly equals another, and the concept 'leaf' is formed through an arbitrary abstraction from these individual differences, through forgetting the distinctions". We could say the same about the concept of a tourist. Kant (1974 (orig. 1800)) adds that concept formation is enabled through the processes of comparison, reflection and abstraction and also stressed the importance of finding similarities in constituent cases that comprise an overarching concept. Whilst these authors address the issue of concept construction from the
micro to the macro, Beaney (2003) demonstrates a more deconstructionist approach explaining that conceptual analysis can involve breaking down concepts into their constituent parts in order to improve the understanding of them.

The way a term is used can also help to understand meaning. So for example in tourism Butler (1980, p. 1) writes about the “concept of a tourism area life cycle evolution”, Cazes (1989, p. 1) reflects on “an ambiguous” concept of alternative tourism and Olsen (2002, p. 1) discusses “authenticity as a concept in tourism research”. Locating similar terms can offer further triangulation of meaning and a thesaurus search against “concept” generates words such as notion, thought, model, analysis and belief. Similarly distinguishing a term from competing terms can lead to greater clarity. A close cousin to “concept” is “theory”. But theory seems to do different work to that of concept. A theory is more about cause and effect and offers more predictive power. Hence we have the theory of gravity, the theory of the firm. Theories explain how things behave. Concepts describe and help us understand complex ideas (e.g. responsibility) and propose novel juxtapositions of ideas (e.g. responsible tourism).

2.6.3 Research on conceptual research

A search of multiple databases reveals a dearth of research on conceptual research although a limited literature exists in fields and disciplines outside of tourism studies. For example part of Meredith’s (1993) research in Operations and Production Management defines terms relevant to conceptual research methods and describes different conceptual classification schemes. Dreher (2000) devotes a book to conceptual research in psychoanalysis clarifying the term and explaining the importance of key Freudian clinical concepts such as transference, resistance and interpretation. She explores the mutuality of the relationship between empirical and conceptual research and offers two case studies on the procedures used in conceptual research and suggestions for further improvements. However the literature also reveals some confusion and inadequacies. For example, even though conceptual research appears to be more common in psychoanalysis, Leuzinger-Bohleber and Fischmann (2006) note that few authors have characterised their papers as conceptual research. Elsewhere, whilst conceptual research is found to be one of the three most used research methods in Information System Studies, researchers in that field report a lack of codified principles and procedures on how to carry out conceptual research (Mora, Gelman, Paradice and Cervantes, 2008). Furthermore, Leuzinger-Bohleber and Fischmann (2006) indicate that the quality criteria for conceptual research have not been clearly defined.
Similarly, Squires, Estabrooks, Newburn-Cook and Gierl (2011) point to a lack of survey instruments that can measure reliability and validity in the utilisation of conceptual research. Apart from these several literatures, conceptual research tends to be a research gap in methodological studies.

2.7 Rationale of conceptual research

The insufficient attention paid to conceptual research does not mean that it is unnecessary or not valuable to do. The most important rationale of conceptual research is attributed to the limitations of empirical research.

2.7.1 Limitations of empirical research

Empirical research is defined as “research that obtains knowledge from first-hand observations or experimentation as well as re-examination of data collected by others” (Simon, 1969, p. 6). It is often used for the exploration of specific questions or the testing of hypotheses. The knowledge is gained from actual experience (observations or experimentation). Great importance is attached to empirical research in almost all research realms. “It is impossible to gain an insight about the real world and its laws by mere reflection and without empirical control”, claimed by Stegmuller (1978, p. 346). While empirical research is attributed to many advantages, it has its limitations.

From the view of resources, empirical research is criticised in terms of costing time, manpower, materials and money. It may also entail the risk of failure in getting access to the firms and data necessary for the studies. What is more, the practitioners may lack the required skills (Gagnon, 1982). Weibelzahl and Weber (2002) indicate that empirical research has at least two limitations: the inherent limitations of empirical research in general, and errors and pitfalls that are directly related to the layered evaluation approach. The aim of positivist empirical research is generally to test a hypothesis. Thus, there are three possibilities, the hypothesis is modified, supported or rejected. Uncertainty is often expressed in a statistical probability value. They further point out that whilst empirical research is very good at identifying design errors and wrong assumptions it fails in suggesting new theories or approaches directly, which means theoretical grounds or conceptual research is the basis of empirical research, which have to be combined in order to yield useful results. Empirical researchers often neglect that suitable procedures are essential not only when testing hypotheses empirically, but also examination of logical form (Dreher, 2000). The
examination of logical or philosophical issues are objectives which go beyond the scope of empirical research. This is to say that empirical research alone is not enough for the development of science, whether natural or social.

To summarise, empirical research is constrained by focusing on “what is” rather than “what could be” and may be blind to the invisibility of the obvious (Kenway and Fahey, 2009). When it comes to the outcomes of empirical research, several questions need to be considered. Are its results universal or only valid for a small group of people? Do they make sense in other settings, especially for people holding different cultural values? Do they challenge existing concepts, or enrich and renew them? Is empirical research reflexive? Although empirical research that is informed by hermeneutic or constructivist approaches and which use some qualitative methods may be able to answer some of the questions, it is not enough. In other words, it can be non-reflective and less creative.

2.7.2 Need and value of conceptual research

Although empirical research involving observation and hypotheses testing is common, not all research is empirical (Schwab, 1999). Dreher (2000) figures out theories are not the supreme objective of science, and also data-accumulating empirical research is not the only road to scientific progress. Conceptual reflections and empirical evidence all contribute to scientific change during the development process of sciences. Therefore, conceptual research is valuable and necessary to do.

According to Dreher (2000), empirical research and conceptual research are mutually interdependent. New findings of empirical research may suggest conceptual differentiation and modification of old concepts, while new concepts may enable researchers to explore new empirical evidence (Leuzinger-Bohleber, 2004). Leuzinger-Bohleber and Fischmann (2006) state that the concepts on which the research questions and hypotheses are based are so important that they influence the quality of empirical research. Conceptual research not only attempts to widen the narrow framework of a clarification of concepts solely determined by logic, but is also closely related to the (philosophical) analysis of the use of a concept. It is able to support the integration of the experiences of practitioners into knowledge in a systematic way. It can capture the direction of a conceptual change at an early stage and also enable researchers to present their suggestions for conceptual change. Thus, conceptual research is an essential research mode and is important for the development of science.
Furthermore, conceptual research has certain significant advantages, and fewer disadvantages, compared with empirically based research, such as time and cost saving, convenience, etc. (Gagnon, 1982). What is more, conceptual research is not only something that is, in effect, practised by many reflective analysts, but rather a form of research that is essential to the analysis process, and even inherent to it (Leuzinger-Bohleber, 2004). Conceptual research is the attempt formally and systematically to reason about analytical statements, even though the degree to which conceptual research is formal and systematic may vary. Conceptual research clarifies the analytical assumptions and thus brings to the fore the contrasts and oppositions between different analytical perspectives and their fundamental differences with non-analytical ones. Also, conceptual research is concerned about ideology or value systems in order to be critical and objective. By exploring how the ideas have carried multiple meanings in different value systems and have changed over time, conceptual research can integrate science, society and ideology together (Young, 1995).

To summarise, the most outstanding contribution of conceptual research is that it offsets the shortcomings of empirical research. For example, conceptual analysis can help to answer big, holistic questions that are not amenable to empirical analysis, since the latter necessitates the creation of small researchable packets, meaning that the broad spirit of the inquiry can get lost. Similarly Mayr (1997, p. 26) notes that “the strong empiricism of the Scientific Revolution led to a heavy emphasis on the discovery of new facts, while curiously little reference was made to the important role that the development of new concepts plays in the advancement of science”. Dreher (2000, p. 3) makes a similar point that “scientific progress depends on the expansion of empirical findings and on new or altered concepts”. From the view of resources, empirical research is sometimes criticised in terms of time, manpower, and cost. Also it may not be possible to gain access to data needed for its studies. Empirical research is often less good at suggesting new approaches. Empirical researchers often focus on suitable procedures for testing hypotheses empirically, but can neglect any examination of logical form (Dreher, 2000) or philosophical issues. Further, empirical research can be constrained by focusing on “what is” rather than “what could be” and may be blind to the “invisibility of the obvious” (Kenway and Fahey, 2009). In contrast, conceptual research can provide those imaginative, creative and innovative leaps that give research its life (Gray, Williamson and Karp, 2007).
2.8 Conceptual research vs. other research

Conceptual research is sometimes mentioned with empirical research, but “conceptual research” has not yet been well defined and its relationship with empirical research is also controversial. Whilst some scholars consider conceptual research as an opposite concept to empirical research (Gagnon, 1982; Schwab, 1999; Weibelzahl and Weber, 2002), others may have different opinions (Dreher, 2000, 2003; Leuzinger-Bohleber, 2004; Leuzinger-Bohleber and Fischmann, 2006). The reason for the dissidence owes to different understandings or interpretations of the word “conceptual”. Whilst there is no argument to call the research which based on empirical activities “empirical research”, ambiguity arises when naming the research based on conceptual activities or understandings “conceptual research”. There are two interpretations of “conceptual research”. One is broader comparing to another. The narrow one interprets “conceptual research” as the research relates to or based on concepts whilst the broad one tends to depict it as “non-empirical research”, an opposite term with “empirical research”.

Is all the non-empirical research conceptual research? The answer is no. Since conceptual research is often discussed in juxtaposition to empirical research, they tend to be deemed as two opposite terms. For example Mehmetoglu (2004) classifies articles into either conceptual or empirical by applying the above test suggested by Bowen and Sparks (1998). He indicates that 40% of published papers examined can be classified as conceptual research whilst the rest are empirical research. Same classification is utilised by Carnevalli and Miguel (2008) who consider all the research that develops theoretical–concepts work, reviews of the literature, simulations or theoretical modelling as conceptual research. However, non-empirical research is broader than just conceptual research and can include literary research (as in the case of Marsh above), historical research, and philosophical research and so on.

Conceptual research is also sometimes confounded with historical research. Historical research makes use of historical sources to study events or ideas of the past, including the ideas of persons and groups in past times (Kothari, 2008). Since historical research often reviews past social ideas, attitudes, beliefs, or understandings of a particular issue and analyses how these have changed over time, it is sometimes classified as conceptual research. But although historical research may overlap with exploring the origin, development and current use of concepts as in conceptual research, they are not the same. Conceptual research
not only attempts to review historical issues of concept(s), but seeks to undertake a logical clarification of concepts and analysis of the use of a concept. So historical research may sometimes have a conceptual element but at other times be non-conceptual. The relationship between philosophical research and conceptual research though, is much closer particularly in the analytic tradition where the major focus is on the analysis of concepts.

Can research be both conceptual research and empirical research? The answer is yes. Interestingly, Study One is a good example of research being both conceptual and empirical. It is an empirical work because it uses published journal articles as data and content analysis as part of the method. At the same time, it concentrates on the definition, classification and clarification of a certain concept “conceptual research”. Therefore, it is also conceptual research. Empirical and conceptual research can be interdependent and interwoven.

2.9 The Concept of Conceptual research

What kind of research falls under the term “conceptual research”? Conceptual research is a form of research that is essential to the analytical process, and even inherent to it (Leuzinger-Bohleber, 2004). It is the attempt to formally and systematically reason about analytic statements regarding reality as well as the analytic practice and the practical ideas that have emerged from it. Yong (1995) draws a conclusion that the kind of research he does which helps to clarify concepts and advance the understanding of mind-brain relations is conceptual research. It proposes that an important defining parameter of conceptual research is the attempt to systematically clarify the concepts. Conceptual research focuses on the investigation of the meanings and uses of concepts (Dreher, 2003). It is generally used by philosophers and thinkers to develop new concepts or to reinterpret existing ones (Leuzinger-Bohleber and Fischmann, 2006; Kothari, 2008). That means conceptual research makes the concepts themselves the objects of the research, investigating the origin, meaning and use of the concept as well as its evolution from time or other contexts (Wallerstein, 2009).

Dreher (2000, pp. 3-4) offers a comprehensive understanding of the meaning of conceptual research in psychoanalysis as “a class of activities, the focus of which lies in the systematic clarification of [psychological] concepts ... research is both about the history of concepts, so as to trace a concept’s origin and development, and equally about the current use of a concept, its clarification and its differentiation”. Dreher (2003) also puts forward a working definition of conceptual research in psychology: “Conceptual research is concerned
with the systematic investigation of the meanings and uses of [psychoanalytic] concepts, including their changes” (p. 110). It can be further noted that those scholars who give a relatively clear definition of “conceptual research” tend to adopt the narrow interpretation of the term. On the other hand, those who prefer a broad interpretation fail in proposing a common agreed definition of it. Therefore, this study will use Dreher’s definition as the initial working definition of conceptual research and will develop a comprehensive one after the empirical study of conceptual research in Chapter Three.

Based on the discussions above, conceptual research is neither the same as historical research nor a branch of qualitative research. It is neither an opposite term to empirical research nor synonymous with non-empirical research. The framework of conceptual research can be demonstrated in Figure 2.1. Figure 2.2 shows how conceptual research may be informed by empirical research (flow a) or philosophical analysis (flow b) or a combination of the two. It may provide a point of reference for further philosophical analysis (flow c) or empirical research (flow d). The flow b to d is illustrated by the paper of Kim, Wang and Mattila (2010) which proposes a conceptual framework of consumers’ complaint handing processes for hospitality institutions. It clearly indicates that the model needs to be tested by systematic empirical research. A circular flow around b and c is illustrated by Tribe’s (1997) paper on the indiscipline of tourism, Leiper’s (2000) critical commentary and Tribe’s (2000) subsequent rejoinder. Conceptual research can further be classified into two types: pure conceptual research and partial conceptual research. Pure conceptual research is research that only involves the discussion of concept(s) presented in the above definition of conceptual research.
Figure 2.1 Framework of Conceptual Research

- History
- Origin
- Development
- Definition
- Clarification
- Classification
- Application
- Current Use

Figure 2.2 Conceptual Research

- Empirical
- Conceptual
- Philosophical

Arrows:
- a
- b
- c
- d
2.10 Classification of conceptual research

In the light of the discussion above, work that is considered as conceptual research can be classified into two types: pure conceptual research and partial conceptual research.

Pure conceptual research is research that only involves the discussion of concept(s) presented in the above definition of conceptual research. A good example is the article *Case Study Method in Tourism Research* by Ahmad, Alhilal and Azizi (2008). This defines the idea of a case study, identifies the different categories of case studies, and discusses their significance, and application as well as limitations in tourism research. This is pure conceptual research for the whole paper concentrates on issues of one concept “case study”, the definition, the categorisation and the clarification of the concept. Another example is *The concept of ecotourism: evolution and trends* (Diamantis, 1999). This argues that the scope and criteria used in defining the concept of ecotourism are insufficient based on a review of ecotourism's definitions. It then focuses on the three common concepts within ecotourism: natural-based, educational, and sustainable. The article centres on issues of one concept - ecotourism and therefore can be classified as pure conceptual research. However pure conceptual research does not necessarily involve the exclusion of empirical issues. As discussed above, research can be both conceptual and empirical. As long as the aim of the empirical component is to help to understand concept(s), it can be considered as pure conceptual research. The Chapter Three is a good example of this kind of pure conceptual research since the aim of analysing published journal articles (the empirical component) is to gain a better understanding of the concept –conceptual research.

Partial conceptual research focuses not only on concepts but also considers other issues. These issues might be empirical or conceptual and the aim of analysing these issues is not to understand the concept itself. An example of partial conceptual research can be found in Saxena and Ilbery’s (2008) paper which discusses the concepts of integration, networks and tourism actors in order to introduce the notion of integrated rural tourism. Then the concepts of embeddedness, dis-embeddedness, endogeneity, and empowerment are used as framing concepts to help conceptualise the concept of “integrated rural tourism”. This part is conceptual research. The second part is an empirical work done in the English-Welsh borders by semi structured interviews with 51 business owners/managers and 20 resource controllers.
The aim of this part is to investigate the characteristics of rural networks operating among small businesses and resource controllers and offer suggestions for better operation of integrated rural tourism, rather than the understanding of the concept itself. This part is not conceptual research according to the definition proposed above. Therefore partial conceptual research is where only part of the effort is associated with the understanding of concept(s).

2.11 Limitations of conceptual research

Same as other research, conceptual research has its limitations. First of all, there are no clear criteria to evaluate the quality of conceptual research (Leuzinger-Bohleber and Fischmann, 2006). Although Dreher (2003) puts forward the defining parameters of conceptual research, she figures out there is no standardised procedure (p. 109). Thus, it is difficult to evaluate how good or bad one conceptual research is. Another problem that needs to be addressed is that deviations may occur in translating or transforming the insights gained by conceptual reflections to the empirical situation. It is argued by questions like: “How is one to reconcile the various usages of the concept of ‘transference’ in such diversity of contexts? (Dreher, 2003, p. 104) ” What is more, whilst some conceptual research can contribute to the social science knowledge base directly, some need to be testified by further empirical research. On the other hand, conceptual researchers should not forget that, for the use that is made of them, analytical concepts do not fall within a precise coding but remain uncertain and vague intellectual tools. This is the price of their creative value in the very progress of psychoanalysis (Leuzinger-Bohleber, 2004).

2.12 Positioning conceptual research in research

Further to the definition of conceptual research offered above, a further question that arises is: what is the position of conceptual research in research? Or, in other words, what is the relationship between conceptual research and the existing research categories? Here, therefore, the position of conceptual research will be explored within the three popular classifications of research.

2.12.1 Conceptual research: basic research or applied research?

Research can be classified into basic research and applied research according to their purpose and context. Basic research is defined by the National Science Foundation (NSF) as “original investigation for the advancement of scientific knowledge ... which does not have immediate commercial objectives” (1959, p.124). Basic research is also called fundamental or pure research which “seeks an understanding of the laws of nature without regard to the
ultimate applicability of the results” (Seaborg, 1994, p.66). It is therefore undertaken mainly in universities and as the result of an academic agenda with little consideration of practical applications (Saunders et al., 2009). In contrast to basic research, applied research aims to solve practical problems for organisation(s) rather than to acquire knowledge for knowledge’s sake. The purpose and context of basic research and applied research can be presented in Figure 2.3.

Is conceptual research basic research or applied research? According to the discussions above, conceptual research aims to expand the understandings of concepts or conceptual level issues and the findings contribute to the knowledge value to society in general, rather than to solve practical problems for organisations. Conceptual research is usually undertaken by people based in universities. It is the researchers who determine the topic and objectives without the involvement of organisations. The time scales of conceptual research are flexible. All of these characteristics suggest that conceptual research belongs to basic research. For this study, the objectives are designed to expand the understandings of sustainable tourism which is valuable to social science. The author is a doctoral student based in a university who chose the topic and objectives. The time scale for this study is relative flexible. Consequently, this study or this conceptual research is basic research.

**Figure 2.3 Basic and applied research**

![Basic research vs Applied research diagram](source: Saunders et al. (2009, p.9))
2.12.2 Conceptual research: exploratory research, descriptive research or explanatory research?

Research is also classified into exploratory, descriptive and explanatory according to the purpose of research. Exploratory research is undertaken to seek for new insights or explore questions and phenomena in a new light (Robson, 2005), while descriptive research aims to provide accurate descriptions of the characteristics of the variables (Sekaran, 2006). The purpose of explanatory research is to construct causal relationships between variables (Saunders et al, 2009) or, in other words, to answer why things happen the way they do (Neuman, 2000). Conceptual research often seeks to explore new insights regarding concepts or to expand new understandings of conceptual issues; therefore, it tends to be exploratory research. This study aims to explore how to reinterpret sustainable tourism in the light of Chinese cultural values so as to add some new insights on the understanding of sustainable tourism. This conceptual research is thus exploratory research. The fact that no variables are involved in this study indicates that it is not descriptive research or explanatory research.

2.12.3 Conceptual research: quantitative research or qualitative research?

The most common way of separating research is to classify it into quantitative research and qualitative research. Quantitative research is “the research aiming at gathering data with the purpose of testing hypotheses, as to follow the objective being examined and to measure the accuracies” (Saunders et al., 2009, p.256). Qualitative research is defined by Denzin and Lincoln (2000, p.3) as: “a situated activity that locates the observer in the world. It consists of a set of interpretive, material practises that makes the world visible. These practices turn the world into a series of representations including field notes, interviews, conversations, photographs, recordings and memos to the self.” It is concerned with the understanding of the beliefs, opinions, emotions, and so on. The differences between quantitative and qualitative data are set out in Table 2.5.
Table 2.5 Divisions between quantitative and qualitative

<table>
<thead>
<tr>
<th>Quantitative data</th>
<th>Qualitative data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Based on meanings resulting from numbers</td>
<td>Based on meanings expressed through words</td>
</tr>
<tr>
<td>Collection results in numerical and standardised data</td>
<td>Collection results in non-standardised data requiring classification into categorise</td>
</tr>
<tr>
<td>Analysis conducted through the use of diagrams and statistics</td>
<td>Analysis conducted through the use of conceptualisation</td>
</tr>
</tbody>
</table>

Source: Saunders et al., 2009, p.482

According to the characteristics of qualitative research, conceptual research seems to be one of its branches since conceptual research often aims to provide understandings of the beliefs, opinions, values, emotions, and so on. Taking Study Two as an example, the aim is to reconceptualise sustainable tourism in the light of Chinese cultural values or, in other words, to provide a different understanding of sustainable tourism in respect to people from different cultures. This accords with the characteristics of qualitative research. Nevertheless, is all conceptual research qualitative research? The answer is no. Conceptual research is often confounded with qualitative research since both of them concentrate on understandings of beliefs, opinions, emotions, and so on. As Thyer (2009) suggests, however, whether quantitative methods or qualitative methods or mixed methods are used in research, as long as the research involves the gathering of empirical data, it can be classified under the term of empirical research. Similarly, no matter what methods are used in research, as long as the research involves the discussion of understandings of concept(s), it is conceptual research. Conceptual research can be quantitative as well as qualitative or just a single-case research (Wallerstein, 2009), or neither of them.

2.13 Conclusion

This chapter is the first part of Study One with the aim to clarify what conceptual research is. It starts with the process of exploring possible research methods and strategies for Study Two. Following an overview of four major paradigms that structure research (positivism, postpositivism, critical theory and interpretivism), it demonstrates that Study Two uses the critical theory paradigm to establish the rationale and then adopts the interpretivism paradigm to interpret sustainable tourism. The common research methods used by interpretivism, however, (observation, interview or focus group, ethnography, case
study and grounded theory) are demonstrated not to be suitable for Study Two. In addition, research methods used by other paradigms (questionnaire and experiment) are also rejected. Considering the characteristics of the aim and data of Study Two, systematic review and content analysis are deemed as possible methods. On the other hand, Study Two cannot be categorised into any of the existing research strategies (experiment, survey, case study, action research, grounded theory, ethnography, and archival research). With regards to the characteristics of Study Two, which concentrates on concepts, conceptual research is proposed as the research strategy. Conceptual research is found to have been largely overlooked in methodological studies, however. In order to adopt conceptual research as a research strategy in this study, this chapter, therefore, embarks on a study of it.

It is argued that whilst empirical research has its limitations, conceptual research has value and needs to be paid more attention to. Conceptual research is not mutually complementary with empirical research: not all the non-empirical research is conceptual research for there are other research such as historical research and philosophical research. A research can be both empirical research and empirical research at the same time. Conceptual research is research that aims at understanding a concept(s), irrespective of the methods used. It can be classified into pure conceptual research and partial conceptual research. With regards to the classification of research, conceptual research tends to be basic research and exploratory research. Although most conceptual research is qualitative, it is not a branch of qualitative research. It can be quantitative or qualitative or neither of them.

The discussions on conceptual research in Chapter Two are insufficient for Study Two to be adopted successfully. The situation of conceptual research in tourism, a typology of frequent issues and approaches presented in conceptual research, as well as how conceptual research contributes to tourism studies will be discussed in Chapter Three by means of an empirical study analysing the published journal articles in tourism academia.
Chapter 3 Understanding Conceptual Research in Tourism

3.1 Introduction

As demonstrated in Chapter Two, the common research strategies are not suitable for Study Two. Since Study Two focuses on concepts and aims to reinterpret sustainable tourism in the light of Chinese cultural values, conceptual research is proposed to be the research strategy. Conceptual research, however, is found to be a research gap in methodological studies. In order to adopt this strategy in Study Two, therefore, it is necessary to make clear what conceptual research is and how it can be carried out. In this regard, Chapter Two clarified the value, definition, classification and limitations of conceptual research, as well as its position in research, but how conceptual research can be carried out is still uncertain, especially in the realm of tourism research. This chapter, therefore, further explores conceptual research, concentrating on tourism studies, thus forming the second part of Study One. Objective one of the study will be achieved with the completion of this chapter.

This chapter focuses on conceptual research in tourism. First of all, it takes an overview of tourism research and indicates that conceptual research in tourism is somewhat neglected and needs to be developed for tourism academics. Secondly, the method of this chapter is discussed, with content analysis being chosen. After explaining and assessing the method, the population of data is presented. In order to estimate the percentage of conceptual research in tourism, a sample is selected. The intended outcome of the quantitative content analysis is to discover the significance of, and trends in, conceptual research by interrogating 471 sample published articles. The aim of the qualitative content analysis is to present the key issues and approaches of conceptual research, along with a plausible typology. Furthermore, ten classic tourism conceptual research papers are mapped onto the typology and analysed in greater depth to illustrate conceptual research in tourism. Finally, the chapter concludes by summarising the benefits and quality issues of conceptual research.

3.2 Overview of tourism research

Before talking about tourism research, it is necessary to make clear what tourism is. As Smith (2010) points out that, all tourism research is fundamentally shaped by how the researcher defines tourism. This study is not going to list the different definitions of tourism,
nor the discipline or indiscipline of tourism, but to concentrate on the strategies of tourism research. Various research strategies have been undertaken within the social sciences which are discussed in Chapter Two. As a field in social science, tourism research is commonly labelled as quantitative, qualitative or mixed, based on the methodology used. Although, since World War II, research within the field of tourism was dominated by quantitative methods for a long time (Walle, 1997), qualitative research in tourism has been addressed and journals such as *Annals of Tourism Research* (ATR) have published qualitative articles consistently since their inception (Riley and Love, 2000). Also, it is not unusual to find exploratory tourism research, descriptive tourism research, comparative tourism research, predictive research, etc. (Jennings, 2001). A special classification of tourism research which is different from the common ones in social science was proposed by Jafari (1992). He concludes that tourism research can be divided into four platforms according to the relationship with tourism industry: the Advocacy platform (research to maximise the benefits of tourism), the Cautionary platform (research to minimise the costs of tourism), the Adaptancy platform (a synthesis of Advocacy platform and Cautionary platform), and the Science platform (research of tourism itself that is usually empirical and politically neutral).

Although the tourism industry has been growing significantly, it has only been relatively recently that tourism is being taken seriously as an academic discipline (Cukier, 2006), meaning that tourism as a research area, is now also growing rapidly. There has been an associated steady growth in the literature on research methods in tourism. After an initial concentration on quantitative methods, authors have increasingly turned their attention to qualitative approaches to research (e.g. Goodson and Philmore, 2004). Whilst tourism research has increased rapidly in the last two decades, it is criticised as being affected too much by management and business applications. Tribe (1997) indicates that tourism studies tend to adopt the business interdisciplinary approach, while Veijola (2007) argues that too much importance is attached to the advocacy platform at the expense of critical and reflexive research (Veijola, 2007).

Whilst researchers seem to have a ready sense of what is meant by the distinction between quantitative and qualitative research, the meaning and approaches of conceptual research are less well understood. With regard to the tourism realm, there is currently no work which offers a comprehensive understanding of conceptual research. That is not to say that no conceptual research has been carried out in tourism. Rather, there has been little in the
way of explication of this approach to research for tourism studies. To concentrate on conceptual research does not mean empirical research is not important, but to clarify and address conceptual research as an important form in tourism studies. As discussed in Chapter Two, empirical research is constrained by focusing on what is rather than what could be. Apart from the general limitations of empirical research listed in Chapter Two, empirical tourism research carries another key limitations: it cannot prove what is right but only what is wrong (whilst using the data collected to test the model, the research cannot make sure whether the model is accurate or a coincidence); since most of the empirical tourism research belongs to positivism or quantitative traditions, the meanings, values and the deeper nature of tourism experience cannot be probed (Smith, 2010). Conceptual research is therefore valuable in the developing process of tourism research.

3.3 Method used in this chapter

This chapter attempts to gain a better understanding of conceptual research in tourism, particularly how it is carried out. The question is how this can be realised. First of all, the conceptual research which has been done in tourism needs to be identified. Secondly, this must be analysed systematically and deeply. There are thousands of pieces of research that have been done in tourism, however, and it is clearly impractical to search them all to find the conceptual research ones. The approach adopted, therefore, is to focus on published tourism journal articles. Since the population of published tourism journal articles is still too big, it is necessary to sample it. This chapter, therefore, can be considered as a standalone empirical work which aims to understand conceptual research by analysing published tourism journal articles.

3.3.1 Method for this chapter

There are many research methods can be used to analyse documents; although some, such as thematic analysis and discourse analysis, seek patterns in the data, they take interviews or conversations as raw data and thus do not suit this chapter which uses journal articles as data. The most relevant methods are content analysis and grounded theory. Although this chapter, as an empirical work, is going to begin with data collection and then determine categories before analysing, this is not to produce a theory. Therefore, grounded theory is not fit for this work.
On the other hand, content analysis is fit not only from the perspective of the aim, but also that of the process. To understand conceptual research better, and probe the situation of conceptual research in the tourism realm, this chapter is going to use published tourism journal articles as the data for analysis. As Smith (2010) claimed, journal articles can be the sources of text and used as data in content analysis. Also, this chapter aims to find out the trend of conceptual research over different time periods, which matches the form of content analysis. In fact, content analysis has been used by many scholars in tourism research (Swain et al., 1998; Kim 1998; Xiao and Smith, 2006a). Tribe (2008) uses it to look for absences of a certain concept or topic (specifically of critical theory), taking the CABABS database as a method of data mining. This chapter aims to search not only for the presence of conceptual research in tourism studies but also its absence.

According to the two aims of this chapter, the method is divided into two parts: quantitative and qualitative. The quantitative part seeks to determine the frequency of conceptual terms in CABABS titles and abstracts, and a sample of 471 articles are selected in order to estimate the percentage and trend of conceptual research in tourism. The qualitative part seeks to develop a possible typology of the popular issues presented in conceptual research by analysing 46 pure conceptual research articles with a focus on ten key tourism concepts in classic conceptual tourism articles.

3.3.2 Research questions

Answers to the six research questions proposed need to be with respect to in doing content analysis by Krippendorff (2004) as follows:

- Which data are analyzed? This work is going to analyze the published tourism journal articles.
- How are they defined? They are published tourism journal articles gathered and can be accessed to by CABABS.
- What is the population from which they are drawn? All the tourism journal articles gathered by CABABS from 1981 to 2010.
- What is the context relative to which the data are analysed? The data may be used for other objectives but not for conceptual research clarification.
- What are the boundaries of the analysis? The articles are all categorized into tourism research and published between 1981 and 2010.
• What is the target of the inferences? Through content analysis, this work is to find out the percentage and the trend of conceptual research in tourism as well as deeper understanding of conceptual research including how it is carried out, the features, the results and the limitations.

3.3.3 Data collection

The data, which is used to present the extent of conceptual tourism research, is collected from the CABI (www.leisuratourism.com) abstracts database, CABABS. CABABS used in this work is a database of abstracts gathered from about 400 publications in tourism correlative research from 1974 to the present (Tribe, 2008). The process of data collection went as follows. First of all, the search code UU700 (the tourism and travel code) was applied to the database as a filter in order to narrow the search to the tourism realm only. Then a variety of different terms which might be used in conceptual research was used as key search words in CABABS to provide data from tourism entries. The result can be seen in Table 3.1.

### Table 3.1 Frequency of Conceptual Terms in CABABS Titles and Abstracts

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<tr>
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<tbody>
<tr>
<td>Concept*</td>
<td>1,464</td>
<td>3,288</td>
<td>4,752</td>
</tr>
<tr>
<td>Philosoph*</td>
<td>190</td>
<td>234</td>
<td>424</td>
</tr>
<tr>
<td>Refle*</td>
<td>510</td>
<td>1,175</td>
<td>1,685</td>
</tr>
<tr>
<td>Histor*</td>
<td>1,730</td>
<td>2,685</td>
<td>4,415</td>
</tr>
<tr>
<td>Review</td>
<td>2,026</td>
<td>3,895</td>
<td>5,921</td>
</tr>
<tr>
<td>Notion</td>
<td>115</td>
<td>420</td>
<td>535</td>
</tr>
<tr>
<td>Idea</td>
<td>372</td>
<td>638</td>
<td>1,010</td>
</tr>
<tr>
<td><strong>Total of above Terms</strong></td>
<td><strong>6,407</strong></td>
<td><strong>12,335</strong></td>
<td><strong>18,742</strong></td>
</tr>
<tr>
<td><strong>Total Articles</strong></td>
<td><strong>18,985</strong></td>
<td><strong>31,610</strong></td>
<td><strong>50,598</strong></td>
</tr>
</tbody>
</table>

*Note: the total may include double counting of some articles.

*denotes that the proxy term uses the “wild symbol” of an asterisk in the search in order to pick up various forms of the term. (Tribe, 2008)

The terms listed in the first column of Table 3.1 are selected as potential proxy terms that might indicate the presence of conceptual research. Concept* was selected as a proxy
term and the wild symbol “*” is used to capture the various forms of the term, such as concept, conceptual, conceptualise, and reconceptualise- all related terms that are central to conceptual research. Notion and idea were chosen for they have similar meanings with concept so that may be included in conceptual research articles. Conceptual research sometimes overlaps with philosophical research and historical research, therefore philosoph* (in order to pick up philosophy and philosophical) and histor* (in order to pick up history and historical) were selected as potential terms for conceptual research. Since conceptual research always inevitably refers to review of the definitions, development or opinions on a concept or some concepts, review was considered as a proxy term of conceptual research. In addition, conceptual research is often associated with reflectivity of the concept and question its applicability in new situation or other value system, refle* (in order to pick up reflect, reflection, reflective, reflexive and reflectivity) was used as a search term of conceptual research.

Two periods of equal length (1981-1995 and 1996-2010) were chosen to identify both the total situation of conceptual research in tourism and to probe the developing trend of it. This work divided the raw materials into two time periods (15 years each) to find out whether there had been any noticeable increase of conceptual tourism research over a recent period. The year 1981 was chosen because although the abstracts were first fully compiled in 1974 few articles were collected between 1974 and 1980.

3.3.4 Limitations of the method

Three limitations to this method were identified by Tribe (2006, 2008). First, some articles with the keywords in the main body of their texts may be missed because only titles, keywords and abstracts are interrogated. Second, a search under a particular word may miss some potential articles. Some articles which do not include these terms may also be conceptual research. Third, CABABS only abstracts literature classified in the tourism and travel domain while literatures classified under other social science disciplines were overlooked. Besides these three limitations, another three have to be pointed out. Fourth, non-English publications were excluded from the scope of analysis. Fifth, besides the limitations of missed articles due to the limited proxy terms used, the quantity cannot be accurate due to the following reasons:

- Total of the articles with these potential proxy terms is greater than the real because double counting of some articles may be included. Some articles may
contain more than one terms listed in the first column and thus be counted twice or more.

- Not all the articles searched out by the terms are conceptual research papers, a lot of noise exist in the population. “Noise” refers to those articles that contain the proxy terms but which are not genuine conceptual research papers. That is to say, the number of real conceptual research articles in tourism during the period 1981-2010 is much less than the total of these potential terms.

Sixth, the noise is difficult to clear away because of two reasons:

- There is too much noise there. Most of the 18,742 articles are noises so that it is very time consuming to pick them out.
- The database only includes the tiles and abstracts, and some articles require detailed reading of their main body to decide what types of research they are.

3.3.5 Sampling

As presented in Table 3.1, the number of total articles under the potential proxy terms is 18,742. As stated above, there is a lot of noise that exists among them. In order to get rid of the noise, all the titles and abstracts (some articles may require to go through the main body) would have to be checked to judge whether they are conceptual research or noise. However, this would be too time consuming. Since the quantitative objective of this chapter is to evaluate the situation of conceptual research in the tourism academy, it is not essential to know the exact number of conceptual research which has been down in the past. Rather it is sufficient to determine the approximate situation and the trend. Since 18,742 articles are too many to be analysed, it is necessary to select a sample. In order to reduce the number of articles, so stratified random sampling was used and the population was divided into seven strata proportionally according to the proxy terms. Four hundred and seventy one articles were selected which can be considered as a reasonable sample size for it is big enough to evaluate the population with an acceptable error value (5%) and it is small enough to make analysis feasible.

The objective of the qualitative analysis was to ascertain what kinds of issues and approaches are commonly presented in conceptual research. In order to realise this objective, another sample was used. The articles that were most purely conceptual (conforming to our earlier exposition and especially working definition by Dreher in Chapter Two) were included in this sample. Thematic analysis (Braun and Clarke, 2006) was deployed and the
articles were carefully read and re-read one by one and comprehensive notes were taken. The
notes detailed how conceptual research is carried out, common issues and approaches. The
notes were then coded and categorised into memos prompted by points raised from the
literature review, the working definition and new ideas emerging from the data. For example,
“…the systematic clarification of concepts…” (Dreher, 2000, pp.3-4) in the initial working
definition formed the basis for one memo. This process was repeated until no more new facts
were uncovered – or in other words until theoretical saturation of the data was achieved. The
memos were synthesised and ordered into themes and the themes were reviewed and refined
by the researcher. As a result forty six pure conceptual research articles were analysed in
detail and twelve themes emerged.

3.4 Quantitative aspects: volume and trends

The findings shown in Table 3.1 demonstrate the extent of conceptual research in
tourism. Although 18,742 articles emerged by searching for the proxy terms, not all are
genuine conceptual research because of noise. But many articles demonstrated genuine
conceptual tourism research. A good example is WACC as the touchstone performance indicator: The use of financial ratios as performance indicator – from operations to capital investments authored by Jung (2008). This is conceptual research as it discusses the domain and application of a particular concept, stretching the idea of economic value and proposing a conceptual framework for practitioners who find themselves in unique business situations. Similarly Wang and Wang’s (2009) article discusses the origins of the "eco-agricultural tourism" concept, establishes differences from similar concepts and proposes a unified concept.

To deal with the ambiguity presented in the wide population of potential conceptual
research, the percentage of actual conceptual research articles in the sample of 471 articles
was determined in order to estimate the situation for the whole population. Based on the
understanding of conceptual research outlined previously, a careful inspection was made of
the 471 articles one by one to judge whether they were conceptual research articles or noise.
If an article was found to be conceptual research, it was further judged as to whether it was
pure or partial. The process proceeded as follows. Each article was scrutinised to first
determine whether its title suggested conceptual research and if so the abstract was examined
followed by the full paper. The first article scrutinised was titled Chasing a myth? Searching for 'self' through lifestyle travel by Cohen (2010). Its title hints at conceptual research since it
refers to the concepts of “self” and “lifestyle travel”. So the abstract was examined. The first sentence of the abstract: “This paper problematizes the concept of searching for self in the context of lifestyle travellers……” drops a hint that this is conceptual research. A full reading of the paper found that it clarified the meaning of the concept of searching for self in a particular context—lifestyle travellers.

The next step was to establish whether it is a pure or partial conceptual research. Cohen did qualitative empirical work involving 25 in-depth semi-structured interviews with lifestyle travellers in northern India and southern Thailand. The aim of this empirical work is not to clarify the concept but to test his assumption that lifestyle travellers seek a core or “true inner self”. Therefore, this is not pure conceptual research but partial. The same process was taken for the second article How can organizational leaders genuinely lead and serve at the same time by Wildes (2008). This conceptualises the components that should be included in the concept of Corporate Social Responsibility with regards to managers of hospitality services. So it is conceptual research. It was considered as pure conceptual research for it just analysed the literature on the concept from beginning to end. The third article, ICT - an innovative approach to sustainable tourism development by Ali and Frew (2010) was about how Information and Communication Technology (ICT) can be applied to sustainable tourism development. It does not analyse the issues of concept(s) and only occasionally mentions the word “conceptual” as in the sentence “This paper discusses and presents a conceptual version of……” Therefore, it is deemed as noise.

All the 471 articles were interrogated in this way and the results are presented in Table 3.2:
Table 3.2 Frequency of Conceptual Research in Selected Articles

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<tbody>
<tr>
<td>Pure conceptual research (x)</td>
<td>4</td>
<td>15</td>
<td>19</td>
</tr>
<tr>
<td>Partial conceptual research (y)</td>
<td>11</td>
<td>23</td>
<td>34</td>
</tr>
<tr>
<td>Conceptual research (a=x+y)</td>
<td>15</td>
<td>38</td>
<td>53</td>
</tr>
<tr>
<td>Total selected sample (b)</td>
<td>163</td>
<td>308</td>
<td>471</td>
</tr>
<tr>
<td>Percentage of conceptual research (a/b)</td>
<td>9.20%</td>
<td>12.34%</td>
<td>11.25%</td>
</tr>
</tbody>
</table>

Notes:

- \(x\) = frequency of pure conceptual research in the sample
- \(y\) = frequency of partial conceptual research in the sample
- \(a\) = frequency of conceptual research in the sample
- \(b\) = the total number of papers in the sample

It was found that genuine conceptual research accounts for only 11.25% of the sampled works. The estimate of total number of conceptual papers is therefore approximately 2,109 (18,742*11.25%) between 1981 and 2010. Since there are a total of 50,598 articles under the code UU700 Tourism and Travel, conceptual research only accounts for 4.17% (2,109/50598) of this total thus illustrating that conceptual research is found to be somewhat overlooked in the tourism research academy. From the results presented in Tables 3.1 and 3.2, it can be deduced that approximately 590 (6,407*9.20%) conceptual research articles were recorded during the period 1981-1995. During the later period, 1996-2010, there were 1,523 such articles (12,335*12.34%). This suggests that more conceptual research was done in the recent 15 year period than the earlier one. In fact whilst the total number of tourism articles increased from 18,985 to 31,610 the percentage of conceptual increased from 3.11% (590/18,589) during the period 1981 to 1995 to 4.82% (1,523/31,610) during the period 1996 to 2010. It can therefore be seen that conceptual research became more common in the recent period.

3.5 Qualitative aspects

3.5.1 Typology of issues in conceptual research

This section discusses the themes that capture the main elements of conceptual research and constitute a twelve part typology. Since there is sometimes overlap between the themes it should be considered as a fuzzy typology.
i. **Defining concepts:** The most common issue discussed in conceptual research is the definition of a particular concept or concepts. For example some conceptual research lists different definitions of a concept followed by critique, evaluation and synthesis. Ahmad, Hussein and Abdul (2010) provide a good illustration of this. Starting from an observation that an existing “definition is not useful from the marketing perspective …” (p. 151), they list several definitions of non-urban tourism and then discuss their differences as well as issues of context.

ii. **Comparing concepts:** After a definition is proposed, conceptual research often proceeds with the distinction of concepts, sometimes the comparison of similar concepts and sometimes the contrast of quite different ones. This can be found in Tribe’s (2008) article which clarifies the concept of critical theory by distinguishing it from positivism, interpretivism and constructionism. Other articles compare the definitions of a concept from different perspectives. Elsewhere Tribe (1997) critically distinguishes the concept of tourism from three different perspectives: the phenomenon perspective, the study perspective and the education and training perspective.

iii. **Historical analysis of concepts:** In order to understand a concept better and propose an adequate or new definition, a review of the origins, development, and evolution of a concept or several concepts can be helpful. For example Zehrer and Raich (2010) carried out a literature review of the development and evolution of the term “network” by showing the four main clusters of theoretical traditions relating to networks and using this as a basis for defining “networks”. Similarly in the article *Sustainable tourism: an overview of the concept and its position in relation to conceptualisations of tourism*, Hardy, Beeton and Pearson (2003) analyse the context within which sustainable tourism originated and assess its development.

iv. **Constructing conceptual typologies:** Sometimes a concept can be divided into several categories. A typology can be helpful in understanding this situation as well as the criteria to be used in any categorisation. An example is the work of Ahmad et al. (2008) who discuss the fact that case studies can be categorised in a number of different ways. The criteria for categorisation can be their primary disciplinary base, their theoretical orientation or the purpose of the study.

v. **Mapping the scope of concepts:** Conceptual research sometimes entails understanding the scope of a concept. This entails what is associated with the
concept, what is included in the concept, the range of the concept, what is excluded and consideration of any fixed or fuzzy boundaries. This memo is illustrated by an article of Sherlock (2001) which contrasts the two concepts of hosts and guests. After evaluating and discussing the definitions and debates surrounding the concepts, the distinction between and scope of the terms host and guest is offered.

vi. Exploring the purposes of concepts: Some conceptual research explores the purpose of the concept driven by the question “why” to find out “how” to make it better. For example, Strickland-Munro, Allison and Moore (2010) explore the purpose of resilience concepts and demonstrate that they can be utilised in investigating the impacts of protected area tourism on communities.

vii. Deconstructing concepts: Some conceptual research critiques a concept by examination of its cultural context or the influence of hidden value systems. An aim here may be to explain the cultural or philosophical bias of a concept or even to propose a more universal concept. For example, Wearing and Wearing (1996) critique the male bias in the conceptualisation of the tourist as “flaneur” and the tourist destination as “image” in the tourist gaze, drawing on ideas from interactionist and post structural feminist theories.

viii. Although conceptual research concentrates on conceptual issues, it can also suggest implications for practice. Jung (2008), in his paper, offers recommendations on how to apply the concept of the Du Pont ratio for operators with the purpose of understanding the true value drivers along with the use of the weighted average cost of capital (WACC) as a benchmark for performance.

ix. Synthesising concepts: Conceptual research can be about integrating or synthesising existing knowledge typically by use of a literature review. Kim, Wang and Mattila (2010) provide a synthesis of the separate literatures related to customer complaint behaviour and service recovery. They propose a conceptual model which integrates the two concepts under a single framework. Conceptual research may bring ideas together in new ways that have never previously been linked to each other. An example can be found in the article of Zehrer and Raich (2010). Here network research is linked to the destination life cycle concept to assist tourism organisations to cope with operational challenges.

x. Translating concepts to new contexts: This may involve stretching a concept to a new context of application. For example, Jung (2008) stretches the concept of
economic value into two new tiers of business organisation—operations and top management. It is also possible to find conceptual research that transforms existing knowledge to a new context that might be a new realm, a new industry, a new cultural society or a new field or discipline. For example Cooper (2006) noticed that knowledge management had attracted researchers’ interests since 1990s but had not been linked to tourism. He bridged this gap by adopting the knowledge management approach to provide an appropriate model for tourism. Similarly, Baggio and Cooper (2010) transfer epidemic diffusion models to destination networks and illustrate how they can be optimised using policy intervention to deliver innovative and competitive destinations.

xi. Finding conceptual gaps: Often idea gaps are found through a reflexive and creative review of relevant literatures. For example, Laing and Frost (2010) reviewed the literature and found that there was a lack of academic research focused on green events. Therefore, they directed their research to this topic in order to explore the meaning, challenges and opportunities of green events.

xii. Proposing new concept /Reconceptualisation: Conceptual research may seek to revise a concept or propose a new one. For example Russo and Segre (2009) compare property regimes in an analytic framework using two destination models based on a different allocation of property rights. They then propose a novel third model resulting from the comparison. Similarly Reisinger and Steiner (2006) argue for the reconceptualisation of the concept of interpretation by adopting the philosophy of Martin Heidegger and promoting the underlying ideas of authenticity and the tourism experiences.

3.5.2 Ten exemplar concepts in tourism

A study on conceptual research in tourism would be incomplete if it failed to fully illustrate its point or ignored discussion of major concepts from the canon of tourism knowledge. Therefore a further part of the qualitative enquiry offers more in-depth examination of ten examples of concepts developed in tourism to provide more holistic illustrations of the processes and products of conceptual research, linking them to the typology and previous discussions. It is evident that each of these papers encompasses multiple themes emphasising the fuzzy nature of the typology. The ten articles were agreed between three researchers as those that made significant contributions to the conceptual
development of tourism study. This section also helps to demonstrate the application of typology developed above.

i. Tourist Area Life Cycle (TALC): This is one of the most famous concepts in tourism research proposed by Butler (1980) in his article titled *The concept of a Tourist Area Cycle of Evolution: Implications for Management of Resources*. This starts from the observation that tourist areas evolve and change over time. Butler critically reviews the previous research (theme three) on this process with respect to different types of tourists and areas which provides the evidence that underpins the concept. By reference to the Product Life Cycle concept, he systematically proposed a hypothetical cycle of area evolution, which transformed an existing concept (Product Life Cycle) to a new context (tourism) (theme ten).

The concept is then unpacked in detail and the stages of evolution - Exploration, Involvement, Development, Consolidation and Stagnation - are explained along with their causes. After Stagnation, he proposes the two possibilities of Decline or Rejuvenation. Butler thus defines the concept of a Tourist Area Life Cycle (theme one), maps the scope of it (theme five) and also considers the implications for practitioners (theme eight). Differences between different areas experiencing the stages of the cycle are critically emphasised to illustrate that the concept should be applied according to circumstances. Butler makes suggestions for tourist area planners and managers on how to protect and preserve tourist attractions in consideration of finite resources and the life cycle, and more importantly suggests different strategies in different stages in order to extend the life cycle as much as possible.

ii. Embodiment in Tourism: This concept was adapted within the context of tourism studies to address a conceptual gap (theme eleven) in Urry’s original (1990) thesis on the tourist gaze. This gap concerned the occularcentric nature of the tourist gaze which failed to recognise the role of the body in the tourist experience. Embodiment was seen as a concept that could be used to fill this gap. Embodiment, according to Crouch (2000, p.63) (theme one), ‘denotes the ways in which the individual grasps the world around her/him and makes sense of it in ways that engage both mind and body.’ Indeed, embodiment disrupted the traditional Cartesian binary opposition between mind and body where the mind was endowed with supremacy over the body.
Veijola and Jokinen’s (1994) paper ‘The Body in Tourism’ focusing on the centrality of the body, represented an engaging critical reflection on Urry’s original (1990) concept of the tourist gaze. Veijola and Jokinen collapse the distinction between mind and body in the tourism experience (theme nine) and claim that in tourism ‘it is our conscious bodies that are temporarily united in an utterly physical ritual’ (p. 133) (our emphasis). They go on to argue for the ‘sexing’ of the tourist body in recognition of the distinctive nature of the female body within tourism and query whether the gaze can be seen as distinct from the eye, ‘the eye from the body, the body from the situation?’ (p. 136). This use of embodiment has spawned several subsequent reconceptualisations (theme twelve) of the tourist experience. According to Rakic and Chambers (2012) ‘embodiment has been used as a critical approach to problematize the objectification of the body within tourism and leisure, including the female body, the homosexual body and the disabled body’ (p.1617).

iii. Sustainable Tourism Development: Sustainable Tourism Development has been a popular concept in tourism research since it was developed from the generic concept of sustainable development in the late 1980s (WCED, 1987). Hunter (1995) argued the need to re-conceptualise the concept which in his view had become overly tourism-centric and parochial (theme twelve). A review of the relevant literature found that the principles and practice of the established paradigm of Sustainable Tourism Development concentrated too much on environment and economic development (theme three). Two alternative conceptual models of sustainable tourism development are presented to show an alternative paradigm which accounts for the intersectoral context of tourism development (theme four). Sustainable tourism development was also re-conceptualized encompassing its relationship with its parent concept, that of sustainable development.

iv. The Philosphic Practitioner: In this paper Tribe (2002) initially deconstructs (theme seven) the term curriculum which:

“…may demonstrate such a narrow conception that the problem of ideology emerges. Indeed some key curriculum terms … demonstrate the operation of an ideology [including] operationalist (Barnett 1994), technicist (Apple 1990), vocationalist (Tapper and Salter 1978), idealist and liberalist” (p.345).
“…the curriculum world differs from Popper’s (1959, 1975) scientific world of naturally occurring phenomena, making any solely scientific-empirical method inappropriate. A model curriculum cannot be defined just by testing and measuring because it exists in the social rather than natural world, where curricula, as Young noted, “are no less social inventions than political parties or new towns” (1971, p.24). Ontologically speaking, a curriculum is not a natural phenomenon which exists independently of human thought, just waiting to be discovered like a new planet or star. Thus developing one is not just a matter of applying good observational skills or of devising the right instruments for its detection” (p.339).

The paper does not mobilise direct empirical evidence (see epistemology discussion) but a curriculum for mere vocational action is exposed as an excessively narrow framing. Philosophic Practice is offered as a more comprehensive frame, building on a critique of Schön’s (1983) idea of the Reflective Practitioner. Schön stressed the importance of adding reflection in and on action to professional education so as to develop what he termed professional artistry. Tribe argued that Schön’s framing was incomplete (theme eleven) and did not challenge the curriculum to engage with the wider world in which professionals practice. So whilst Reflective Practice focuses on effective vocational action informed by continual reflection, Philosophic Practice adds the new dimensions of liberal reflection and liberal action. Liberal reflection encourages professionals to be sceptical about given truths, sensitive to hidden ideology and power, and to reflect about what constitutes “the good life” in the wider world affected by their work. Liberal action is putting the ideas of liberal reflection into practice. Philosophic Practitioners are conceptualised as (theme twelve) those who not only demonstrate professional competence in their careers in tourism but are also able take responsibility for stewardship and the ethical and aesthetic development of the wider world of tourism.

v. Authenticity: The concept of authenticity is germane to tourism studies and there have been several efforts to clarify and to reconceptualise it. For example Wang’s (1999) paper ‘Rethinking authenticity in tourist experiences’ sought to reconceptualise (theme twelve) the concept of authenticity by recognising the subjective and constructed nature of the term, thus rejecting objectivist accounts of the concept which saw authenticity as capable of being objectively measured and determined. Borrowing from Berger (1973) Wang explains that
existential authenticity in the context of tourism (theme ten) ‘denotes a special state of Being in which one is true to oneself and acts as a counterdose to the loss of “true self” in public roles and publicity spheres in modern Western society’ (p. 358). For Wang, this existential authenticity is manifested in the activities of tourists and as such he sought to create a conceptual typology (theme four) of authenticity by dividing it into two broad categories each of which is subdivided into smaller categories. The two broad categories are intra personal authenticity and inter personal authenticity. Intra personal authenticity is subdivided into bodily feelings and self-making. The former involves several dimensions including relaxation, rehabilitation, and sensual pleasures. In the latter, tourists seek to achieve a sort of self-actualisation previously unobtainable in everyday mundane life. Inter personal authenticity is subdivided into family ties (which seeks to strengthen family bonds) and touristic communitas (experienced through interaction with other tourists and the resultant community spirit created). This re-conceptualisation (theme twelve) of authenticity reflects a constructivist perspective (see earlier epistemological section) as it claims that existential authenticity is divorced from any inherent quality of the toured objects or cultures, a point which had been made previously by Bruner (1994) who claimed that authenticity should no longer be seen as a ‘property inherent in an object’ (p. 408). Wang’s reconceptualisation of authenticity has spawned a plethora of further debate and reconceptualisations of the concept including that by Reisinger and Steiner (2006) who argue that for many tourists authenticity is irrelevant as they do not value it, are suspicious of it, or are ‘complicit in its cynical construction for commercial purposes’ (p.66).

vi. Pro-poor Tourism: Pro-poor tourism is a concept proposed to address tourism’s potential contribution to poverty elimination. Ashley, Boyd and Goodwin (2000) advocate the concept in their paper Pro-poor tourism: Putting poverty at the heart of the tourism agenda. They firstly indicate that poverty within the tourism agenda is overlooked (theme eleven) and then discuss the advantages of tourism that is pro-poor. They note that the poor are influenced by tourism in many aspects. Their level of participation in tourism is attributed variously to the type of tourism, planning regulations, land tenure, the market context, and access to capital and training. Pro-poor tourism is conceptualised as that which brings maximum benefits for the poor while minimising negative impacts (theme one). After demonstrating the potential of pro-poor tourism, the authors propose several policy implications to make tourism more pro-poor (theme eight).
vii. Tourism Performance: Tourism performance, according to Edensor (2001), is a concept that considers tourism as “a form of performance, as a set of activities, imbricated with the everyday, whereby conventions are reinforced and broken” (p.2). Edensor firstly discusses the notions of performance, the everyday and reflexivity (theme one). The concept of the everyday is re-interpreted by reviewing different opinions and tourism is viewed as part of everyday life (theme twelve). Then various tourist performances which disrupt the habitual are identified according to different roles that are played out. Tourists are seen to be performers on different stages which are produced, regulated and maintained by suppliers. The author gives explanations of how and why different stages are produced. Along with the idea of tourists as performers, a classification is made comprising directed performances, identity-oriented performances and non-conformist tourist performances (theme four).

viii. Tourism Mobilities: The editorial introduction to the journal Mobilities (Hannam, Sheller and Urry, 2006) offers a definition of this concept (theme one) describing mobilities as “encompassing both the large-scale movements of people, objects, capital and information across the world, as well as the more local processes of daily transportation, movement through public space and the travel of material things within everyday life” (p. 1). Multiple mobilities are then listed (theme four) including illicit ones and their security risks to demonstrate the importance of the concept. The authors also review how mobilities have evolved (theme three) with the development of a ‘networked’ patterning of economic and social life. Further, they explain how changes in mobilities affect nature, families, communities and even the nation (theme six). Recent developments in transformation and communications leading to new technological, social and cultural practices of mobility are deemed as ‘new mobilities’ or the ‘mobility turn’ (theme three).

The authors also define the scope of mobilities (theme five) in relation to spatial, infrastructural and institutional moorings, power geometries and Internet and mobile telephony. They propose alternative issues and approaches for studies of mobilities including finding conceptual gaps (theme eleven). The paper uses airport and city disasters as practical examples to build an intuitive interpretation of mobilities (theme eight). The section An Agenda for Mobilities Research is a mix of themes four and five. This indication of what is associated with and included in mobilities represents a mapping of the scope of the concept. The foremost issue is the relationship between mobilities and tourism. Whilst tourism has always included the important aspect of mobility that involves movement of people between
places, this approach situates it within the wider concept of mobilities. Therefore the concept of tourism mobilities can be understood as including all those mobilities that are generated by the actions of tourists (theme twelve).

**ix. Critical Tourism:** Critical tourism is identified as research and practice gap by Tribe (2008) in his paper: *Tourism: A critical business*. In order to make clear the concept of critical tourism, the meanings of the term *critical* are first clarified (theme one). Giving examples of everyday usage of the term “critical” in tourism Tribe indicates the lack of precise usage of the concept (theme eleven). The origin of the parent concept of critical theory is reviewed (theme three) and comparisons with the positivist paradigm, the interpretive paradigm and constructionism are undertaken (theme two). Then eleven domains are discussed to illustrate the major concerns and associated objectives of critical theory (theme six). Along with the clarification of the concept, the relationships between critical tourism, management and governance are discussed. The remaining part of the paper can be considered as empirical research analysing data to understand the extent of critical tourism research. It is demonstrated that critical tourism research is relatively limited with research on ideology, discourse, and exclusion being its research hot points. Finally, critical tourism is discussed as a means for understanding, being and emancipation.

**x. Hopeful Tourism:** This is a relatively new concept advocated by Pritchard, Morgan and Atelejevic (2011) in their paper: *Hopeful tourism: A new transformative perspective*. The authors first define the values of Hopeful Tourism thereby making a contribution to the philosophy and ontology of tourism. Their review of the literature finds recent tourism research to be more reflexive and critical suggesting the beginnings of a paradigm shift (theme three). Tourism research which is dominated by conventions and orthodoxies such as Western thought is exposed and explorations of new paradigms for tourism knowledge production are advocated (theme six). As a result, the concept of the Academy of Hope is proposed (theme twelve). Five key principles of Hopeful Tourism are presented followed by an unpacking of the details of its tenets (theme four). Hopeful Tourism is also compared with rational tourism enquiry. Finally an agenda of Hopeful Tourism is suggested for developing syncretic understanding of multiple tourism worlds.

The ten above papers are also analysed by way of a grid in Table 3.3 which illustrates the different approaches to conceptual research that each has taken. It can be noted that the
comparing of concepts, the deconstruction of concepts and the synthesis of concepts are less popular approaches, whilst defining, historical review, identification of conceptual gaps and new concept discovery are commonly used in conceptual research.

Table 3.3 Approaches to Conceptual Research

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3.6 Reflection on conceptual research

This section is a reflection on conceptual research in terms of its meaning, epistemological underpinnings, quality issues, benefits and methods used. A clarification of these issues helps to understand better how Study Two (the practice of conceptual research, reinterpret sustainable tourism in the light of Chinese cultural values) can be carried out.

3.6.1 Definition of conceptual research

In Chapter Two, the section 2.8 discussed the concept of conceptual research. It indicated that conceptual research makes the concepts as the objects of the research with the attempt to clarify the concepts, investigating the origin, meaning, use and evolution. Dreher (2003) suggests that conceptual research encourages systematic review of relevant knowledge and explains conceptual research in psychoanalysis as:

‘a class of activities, the focus of which lies in the systematic clarification of [psychological] concepts … research is both about the history of concepts, so as to trace a concept’s origin and development, and equally about the current use of
a concept, its clarification and its differentiation’ (2000, pp. 3-4) (brackets added by author).

This was used as an initial working definition of conceptual research in Chapter Three as a criterion to judge the conceptual research articles. Through the analysis of conceptual research in tourism, it can be found that the scope of conceptual research is wider than what suggested in the working definition. Theme iv Constructing conceptual typologies, v Mapping the scope of concepts, vii Deconstructing concepts, viii Applying concepts to practice and xi Finding conceptual gaps suggest conceptual research may also refer to the controversies, applications, characteristics and idiosyncrasies, discourse and ideological analysis and deconstruction. Revising Dreher’s (2003) working definition, conceptual research in tourism is conceived as:

“a set of activities that focus on the systematic analysis and profound understanding of tourism concepts. Research can cover the antecedents, origin, history and development of the concept as well as its current use, facets, controversies, applications, characteristics and idiosyncrasies, points of differentiation, discourse and ideological analysis and deconstruction. Its major outcomes include the clarification of a concept, the proposing of a new concept, the modification of an existing one (reconceptualisation) or ideological or other critique.”

It is deemed to be research rather than just scholarship since it complies with the Frascati definition (OECD, 1993) where:

“Research…comprise[s] creative work undertaken on a systematic basis in order to increase the stock of knowledge, including knowledge of man, culture and society …”

The difference between conceptual research and historic research is that conceptual research not only attempts to review historical issues of concept(s), but seeks to undertake a logical clarification of concepts and analysis of the use of a concept. The relationship between philosophical research and conceptual research though, is much closer particularly in the analytic tradition where the major focus is on the analysis of concepts. The distinction between conceptual research and critical (systematic) literature review is that conceptual research does not just review what has been done
but results in something new (the proposing of a new concept, the modification of an existing one or re-conceptualisation) and also it refers to a lot ideological critiques.

3.6.2 Epistemological issues of conceptual research

At the outset it should be noted that all research involves concepts and that these are developed more or less explicitly. But this study wishes to identify a special category of conceptual research so it is necessary to examine the relationship between conceptual and empirical research. Of course concepts are central to each of the four major research paradigms - positivism, post-positivism, interpretivism and criticalism but for brevity this section will clarify the epistemological and ontological issues of conceptual research in relation to the two main traditions of objectivism and subjectivism.

Objectivists believe that “experience is the foundation of all knowledge” (Bryant, 1985:1) so that we can only have knowledge of phenomena that are available to our senses. Objectivists thus assert that metaphysical phenomena have no validity as ‘knowledge’. Further, the “truth or falsity of scientific theories depends exclusively upon their logical relationships to the empirical data provided through observation” (Keat, 1981:2). Stegmuller (1978) asserts that “it is impossible to gain an insight about the real world and its laws by mere reflection and without empirical control” (p.346). In this view, conceptual research can only lead to valid knowledge if it is supported by empirical observation. Objectivism and its associated empiricism do not perceive conceptual work as autonomous research. Instead conceptual research is:

‘accorded no more than a heuristic meaning or preparatory role in the research process, if they are recognised at all. “Proper” research is said to concern itself with the collection, evaluation and interpretation of data, not with concepts’ (Dreher, 2000: 4).

Here conceptual research is not sui-generis but is rather often a preliminary stage in a wider research process, used to clarify research questions and hypotheses and as a reference point for interpreting empirical data. For objectivists, conceptual research and empirical research are thus inextricably intertwined in the creation of knowledge. Although Kuhn (1970) destabilised the objectivist/positivist project and its focus on empiricism through his conceptualisation of paradigms, he nevertheless described science as a “two-directional process determined by the interaction of empirical observation and a priori ‘paradigmatic’
frameworks” (Alexander, 1982: 24). Kuhn also did not envisage that conceptualisation could be independent of empiricism in the creation of knowledge. Consequently under objectivism conceptualisation is seen as a tool for gaining knowledge about a subject rather than a concept being the subject of the research itself (Leuzinger-Bohleber and Fischmann, 2006).

In contrast a subjectivist approach traces its history to the Kantian model of human rationality in which the process of knowing and the emergence of knowledge are based upon an epistemology which transcends “the limits of empirical inquiry” (Hamilton, 1994:63). Kant departed from the traditional Cartesian objectivism by arguing that:

‘human knowledge is ultimately based on understanding, an intellectual state that is more than just a consequence of experience. Thus for Kant, human claims about nature cannot be independent of inside-the-head processes of the knowing subject’ (Hamilton, 1994:63).

Subjectivists do not believe that there is an objective truth lying dormant waiting to be discovered. Meaning is not discovered, but is constructed. This suggests that different people may construct meaning in different ways even with regard to the same phenomenon (Crotty, 1998). The subject and the object of investigation are inextricably linked in the creation of knowledge thus collapsing the conventional distinction between epistemology and ontology (Guba and Lincoln, 1994). According to Schwandt (1994), the concern here is with issues of knowing and being rather than with issues of method. In this sense conceptual research is “not defined by a method but by a topic” according to Leuzinger-Bohleber and Fischmann (2006, p.1375). Alexander’s argument for “theoretical methodology” further supports the case for conceptual research:

‘There is a logic at work in the scientific process that has been ignored by spokesmen for the positivist persuasion in social science. Science proceeds as surely by a generalizing or “theoretical logic” as it does by the empirical logic of experiment and the positivist decision to focus on the latter alone must ultimately prove as self-defeating … If the nature of social science is to be properly understood … the careful attention to methodological rules for induction from empirical observation must be matched by an effort to create a ‘theoretical methodology.’(1982:33).
Against the background of a subjectivist epistemology, it is axiomatic that there is a distinct form of research that can be deemed to be conceptual research which, while it may involve some empirical elements, is not limited by, or dependent upon empiricism. At this juncture it is important to reiterate why the word ‘concept’ is being used instead of ‘theory’ since according to Dreher (2000), the word theory conjures up thoughts of systems of scientific statements which are legitimated based on experience and this mirrors the objectivist approach.

So this study positions conceptual research as a particular research strategy that sits mainly in the subjectivist / interpretivist paradigm (with possibilities for critical engagement). As such it does not purport to offer hypotheses testing or theory development. But yet it is quite different from other interpretivist strategies such as ethnography, interviews and focus groups since these depend largely on qualitative empirical data for their development and validation. Of course conceptual research cannot always escape some element of empirical engagement. This might be through prior observations of the researcher that were not originally driven by the research project in hand but are now recalled to forge new connections. Similarly conceptual research may build upon previous concepts that are themselves generated from empirical data collection. But a key characteristic of conceptual research is that it can progress without the need for immediate or specific empirical data to support its knowledge claim. Its outcomes are relativist. It allows for multiple mental constructions and these depend mainly on the persons that create them for their form.

3.6.3 Quality issues of conceptual research

According to Chapter Two, the quality criteria for conceptual research have not been defined very clearly until now (Leuzinger-Bohleber and Fischmann, 2006) which makes it difficult to evaluate how good or bad one conceptual research is. The subjectivist epistemology does not mean that anything goes in conceptual research. Of course the results of conceptual research cannot be proven or disproven by an appeal to empirical data. They are non-falsifiable (Popper, 1959) and so for adherents to strict objectivism/ scientism they have no worth. But it was Albert Einstein who exposed the limitations of such a view by commenting that not everything that can be counted counts and not everything that counts can be counted. If conceptual research that counts cannot be validated by counting it is at least possible to discuss its grounds for warranted knowing.
Quality control is predicated on a number of protocols. The first is good scholarship and this entails the ability to execute a comprehensive and rigorous literature review and to weigh and sift evidence. Second, is the need for what might be termed soft falsification or concept scepticism. This requires that counter evidence should be sought and systematically evaluated as well as supporting evidence in an attempt to refine a concept. This draws an important distinction between conceptual research and polemic since the latter represents a firmly committed, sometimes dogmatic belief and a much more one-sided attempt to establish its position by the refutation, even ridicule, of counter beliefs. The two important traditions of Socratic method and dialectics are also significant. Socratic method entails a persistent desire to refine a proposition by sceptical questioning. Dialectics is a related process by which a thesis gives rise to a contradictory anti-thesis with a view to achieving acceptable synthesis.

Third, rhetoric is crucial and this requires attention to structure, logic and plausibility of the argument presented. Fourth, triangulation and proximity require that the conceptual contribution relates to and maps against established neighbouring concepts. Fifth, validity here means that the results are consistent with the problem that initiated the research. Sixth, transparency requires that the process by which the results were obtained is clear and carefully documented. Seventh, usefulness means that the results add to human understanding. Eighth, the requirements of additionality and revelation demand that the results of conceptual research make something visible that was previously not so. Ninth, given the subjectivist nature of conceptual research, an element of reflexivity, to understand the influence of the self on knowledge construction, is necessary. These protocols can be summed up as a commitment to academic openness, good scholarship and judgement.

3.6.4 Benefits of conceptual research

Based on the data analysis especially the qualitative aspect, it can be seen that conceptual research has lots of benefits. Gray, Williamson and Karp (2007) claim conceptual research can provide those imaginative, creative and innovative leaps that give research its life. Tribe’s (2002) conceptual article on the Philosophic Practitioner makes this point clearly:

“… the method adopted consciously avoids the empirical on the grounds that it may restrict the field of vision to only what already exists. Rather this article seeks to discover what might be” (p. 340).

i. Imaginative
First, conceptual research is imaginative. It is claimed that science is a blueprint for research, and imagination gives research its life (Gray et al., 2007). Since research has the invisibility of the obvious and thus resists conscious scrutiny observes (Kenway and Fahey, 2009), it is important for the researchers to be imaginative. Conceptual research, aiming to new understanding of an existing concept or ideas of a new concept, is imaginative. Both theme ten “Translating concepts to new contexts” and theme eight “Applying concepts to practice” can indicate the imaginative of conceptual research.

ii. Creative and Innovative

Second, conceptual research is creative. Innovation is considered as the heart of knowledge and the process of applying new forms of knowledge (Hall and Williams, 2008). Creativity is a necessary factor enabling innovation (Carayannis and Gonzalez, 2003) as well as a process of developing and expressing novel ideas (Harvard Business Essentials, 2003). Conceptual research often can be creative and original research on concepts or enhancement of concepts with innovative minds. Also it tends to add new insights into traditional problems or new ways to evaluate the process of conceptual development. It may also result in the proposal of new concepts or reconceptualisation. Therefore, it is creative. This can be demonstrated in theme ten “Translating concepts to new contexts”, theme eleven “Finding conceptual gaps” and theme twelve “Proposing new concept/Reconceptualisation”.

iii. Systematic review of the knowledge

Third, conceptual research is systematic. Conceptual research aims to find as much as possible, research relevant to the particular concept, to capture the direction of a conceptual change at an early stage and to present suggestions for conceptual change. It is concerned with the systematic investigation of the meanings and uses of the concepts as well as their change (Dreher, 2003). Therefore, it encourages systematic review of relevant knowledge. It may also support the integration of the experiences of practitioners into knowledge in a systematic way. This can be reflected in theme one “Definition concepts”, theme two “Comparing concepts”, and theme three “Historical analysis of concepts”.

iv. Philosophical

Fourth, conceptual research is philosophical. Conceptual research sometimes refers to philosophical analysis and is often used by philosophers to develop new concepts or reinterpret existing ones (Kothari, 2008). It is often linked to philosophy of science and sociological considerations which originate in a specific context (Leuzinger-Bohleber and Fischmann, 2006). Also, conceptual research can be concerned about ideology or value systems when exploring the different understandings of a concept by different cultures. Thus,
conceptual research is often philosophical. Theme six “Exploring the purpose of a certain concept” and theme seven “Deconstructing concepts” can demonstrate the philosophical benefits of conceptual research.

3.6.5 Methods used by conceptual research

3.6.5.1 General methods shared with other research

Based on the analysis of the conceptual research that has been done in tourism, some research methods are found to be used. Since conceptual research refers to the origin, development and classification of a specific concept or concepts, systematic (literature) review is the most popular method used. The relevant literature are always interrogated to explore the origin, development and different definitions or classifications of the concepts. For example, Ahmad et al. (2010) reviewed the past literature that defines non-urban tourism and rural tourism. After analysing and contrasting the different definitions, they put forward the main determinants of rural tourism. Many researchers tend to claim that they are using is a literature review, such as “A careful literature review is performed to …… (Kim et al, 2010)”, “The paper undertakes a thorough review of the relevant literature …… (Zehrer and Raich, 2010)”. Some articles even consider the literature review as the main purpose, such as Ryan’s (2010) paper, which clearly indicates that its purpose is to offer a review of the relative literature on the concept of the tourist experience.

Another important method used in conceptual research is the case study. The case is used to illustrate the issues of one or more concepts vividly and directly. Birger et al. (2009) analyse the criteria for defining the boundaries of destinations by looking at the case of the Swiss canton of Grisons. This is a single case study that the conceptual paper is based on. Similarly, Greiner et al. (2009) use the Gulf of Carpentaria in northern Australia as a case to clarify the concepts of ecosystem services and environmental services.

There are also other research methods used in conceptual research besides systematic/literature reviews and case studies. For example, Nicholls (2011) analyses consultations with CCI experts and cross-cultural management experts. Zehrer and Raich (2010) take a hermeneutical approach in their conceptual paper, which, after a review of the literature relevant to their key concept—tourism networks—elaborates a series of propositions.
3.6.5.2 Conceptual research approaches

Although systemic literature reviews and case studies are the two most popular research methods used by conceptual research, they cannot indicate clearly how conceptual research can be carried out, or what the differences are between conceptual research and other studies using the same method. Apart from the general methods, there are some specific approaches that are used to carry out conceptual research. According to section 3.4.3, the typology of frequent issues in conceptual research, the twelve themes, can demonstrate how conceptual research can be carried out better. For example theme ii Comparing concepts can refer to the approach of compare and contrast analysis. The analysis of the ten key conceptual research articles in tourism demonstrates that often three or more (at least one) themes are adopted by a piece of conceptual research according to its research question and characteristics. The twelve themes can therefore be considered as specific approaches for conceptual research.

3.7. Conclusion

In conclusion, this chapter opens up the horizon for the study of conceptual research as an important research effort in tourism. It adds a deeper understanding of conceptual research in tourism. The overview of tourism research shows that conceptual research as a term is rare in the literature on tourism. This does not mean, however, that no conceptual research has been done in tourism. In order to find out these examples of conceptual research in tourism and analyse them, CABABS is used for data mining, and content analysis is chosen as the data analysis method. The quantitative analysis demonstrates that conceptual research does exist in tourism research but that it accounts for a very low percentage (4.17%) of the total research that has been done on tourism. This indicates the important contribution of this study to tourism studies.

The qualitative analysis develops a typology of popular issues and approaches presented in conceptual research. Twelve themes were drawn to illustrate what conceptual research is about and how it is carried out. An in-depth analysis of ten classic tourism conceptual research papers demonstrated the feasibility and the emergent probability of twelve themes. Whilst some themes are very frequent in conceptual research, some are relatively rare. Systematic literature reviews and case studies are the two research methods most used by conceptual research.
Overall, therefore, in Study One, Chapter Two clarified what conceptual research is in terms of its rationale, definition, classification, limitations and its position in research, and Chapter Three investigated how conceptual research is carried out in tourism in terms of the popular issues and approaches presented in conceptual research as well as the popular methods used by conceptual research. Objective one of Study One (to clarify what conceptual research is and how it is carried out) has thus been achieved. In the next chapter, the research design with the framework of the study will be presented along with the details of the research methods used for Study Two (objectives 2a, 2b and 2c) or, in other words, an illustration of how Study Two can be carried out in detail.
Chapter 4 Research Design of the Study and Methods for Study Two

4.1 Introduction

As discussed in Chapter Two, conceptual research is less well understood in terms of what exactly it is and how it can be carried out, due to the dearth of the studies on it. In this thesis, Study Two, with the aim to reinterpret sustainable tourism in the light of Chinese cultural values, is different from the common examples of research (experiment, survey, case study, action research, grounded theory, ethnography or archival research) but can be defined as conceptual research. In order to adopt conceptual research strategy in Study Two, Study One (Chapter Two and Chapter Three) concentrated on the theory of conceptual research. At this point, objective one of the thesis was achieved. Chapter Four is a chapter transferring conceptual research theory to conceptual research practice. The main task is to explain in detail how to adopt the conceptual research method to interrogate sustainable tourism using Confucian and Taoist values.

As a methodology chapter, the main task is to explain the way in which research is undertaken (Saunders et al., 2009). This chapter begins with the conceptual framework and then the illustration of the method adopted by Study Two. The process of Study Two is presented in a systematic review undertaken in five steps. The advantages and limitations are then discussed. The research design is explained in detail including data identification, data collection, sampling and data analysis. Qualitative content analysis is adopted as the method for data analysis (step four of systematic review). The process of data analysis is explained, including the identification of data, coding and synthesis. The twelve conceptual research approaches are discussed within steps four and five of the systematic review. Finally, the quality and ethical issues associated with Study Two are discussed.

4.2 Conceptual framework of the study

A conceptual framework demonstrates the main issues (factors, constructs or variables) to be studied, as well as the relationships between them (Miles and Huberman, 1994). The conceptual framework should be developed based on the research question, and thus demonstrates how the research is carried out. The first research question of this study (Study
One) is to clarify what conceptual research is and how it is carried out. The data, conceptual research articles published in tourism journals, has been collected in Chapter Three. The second research question (Study Two) aims to discover the different understandings of sustainable tourism within Chinese cultural value systems as opposed to Western ones. Whilst data set one (the principles of sustainable tourism) can be directly summarised from the existing literature, data set two (key Confucian and Taoist values) needs to be extracted from both the classic works and the history of engagement with these by their followers. In respect to the key Confucian and Taoist values and principles that are relevant to sustainable tourism, comparisons are undertaken to find out which of them fit together and which do not. Then, these key Chinese cultural values are analysed to judge whether they can contribute new insights to sustainable tourism distinct from the existing understandings. Finally, a synthesis and reinterpretation will be conducted. The conceptual framework is presented in Figure 4.1.

It should be noted that, although the research is divided into Study One and Study Two, the relationship between these two parts is not collateral. According to the title of the thesis The Theory and Practice of Conceptual Research in Tourism, this research is a methodological study about conceptual research rather than about sustainable tourism itself. Study One deals with the theory of conceptual research and offers the theoretical underpinnings for conceptual research. Study Two is a practical application of conceptual research, testing the theory developed in Study One. Sustainable tourism, therefore, acts as an illustrative example of conceptual research. The data of selected literatures of Study Two are conceptual research. The conceptual research approaches proposed in Study Two are adopted in each chapter. In other words, Study Two is undertaken as a way of exploring how conceptual research can be carried out; it demonstrates the validity and practicability of the proposed conceptual research approaches, and the benefits and contribution of conceptual research.
Study One: Theory of Conceptual Research

- Scoping for Conceptual Research
  - Definition
  - Classification
  - Value
  - Limitation
- Empirical Analysis of Conceptual Research in Tourism
- Published Conceptual Research Articles in Tourism Journals
  - Volume and Trend
  - Typology of approaches
  - Key Concepts in Tourism
- Research Method Used in Study Two
- Knowledge, Culture and Values

Study Two: Practice of Conceptual Research

- Confucianism
  - ideas
  - values
- Key Chinese Cultural Values
- Taoism
  - ideas
  - values
- Principles of Sustainable Tourism (mainly based on Western values)
- Sustainable Tourism Chinese & Western
- Synthesis and Reinterpretation
4.3 Research methods for use in Study Two

The aim of Study Two is to reinterpret sustainable tourism in the light of Chinese cultural values, and the relevant data is identified as the principles of sustainable tourism and Confucian and Taoist values. It is more appropriate to extract this data from the relevant literature than from respondents. Given the characteristics of the aim, and data needed for the study, systematic (literature) review and content analysis are selected as the most possible methods for Study Two. Systematic review stresses the process while content analysis contributes to the data analysis. In addition, conceptual research approaches (twelve themes) are adopted for data interpretation.

As stated in Chapter Three, systematic literature reviews are the most popular method used in conceptual research. This approach is selected as the method for Study Two because it is a good means of identifying, selecting, evaluating and synthesising all the available relevant literature to a particular research question (Kitchenham, 2004). For Study Two, the relevant literature includes books and journal articles on sustainable tourism that centre on the understanding of the concept and the principles; and the classic works of Confucianism and Taoism as well as the books and articles that explore these concepts and their values. Study Two will follow the process of systematic review (Pai et al., 2004) through five steps: formulating the review questions, search and inclusion of data (literature), quality assessment, data extraction and analysis, synthesis and interpretation. Two review questions are formulated in step one, while the data is identified and the sampling carried out in step two.

As indicated in Chapter Two, systematic reviews are more valuable in respect to their process rather than in actually analysing and interpreting data. In other words, they are very effective for the data identification and collection but weak in data analysis. Consequently, qualitative content analysis is adopted for data analysis in step four. The raw materials identified in step two are separated into “units of analysis” or “coding units”. Coding in this study refers to the process of synthesising the twelve themes of conceptual research, and the process for summarising and abstracting the principles of sustainable tourism, the Confucian values and the Taoist values. Since the qualitative research method is used in the process of systematic review, the evaluation of qualitative research (reliability, validity and trustworthiness) is adopted for the quality assessment in step three. The details of the five steps will be present in the next section.
On the other hand, as a piece of conceptual research, Study Two adopts the twelve conceptual research approaches (twelve themes) that were created in Chapter Three. The twelve conceptual research approaches explain well what conceptual research is about and how it is carried out, indicating the process of doing conceptual research. This coincides with step five of the systematic review. In other words, the synthesis and interpretation are produced through the twelve themes, for example Defining sustainable tourism, Historical analysis of the concept of sustainable tourism, and so on. The details of the twelve themes adopted in each chapter of Study Two will be presented in the next section.

4.4 Research process of Study Two

Research design involves a series of decisions on how the research question(s) will be answered (Saunders et al., 2009), or explains in detail how the data is going to be collected and analysed (Bryman, 2008). Since Study Two is different from the norm in doctoral studies, it is extremely important to explain the research process in order to be understood better. As discussed in Chapter Two, and the above section, the research process of Study Two follows the five steps of systematic review. An introduction to systematic reviews has been presented in Chapter Two, while this section focuses on the process undertaken in the systematic review. The distinguishing characteristic of the systematic literature review in Study Two is the application of conceptual research approaches (the twelve themes) during the process.

Study Two seeks to identify key Chinese cultural values (in Confucianism and Taoism) and the principles of sustainable tourism that are reflected in the existing literature. Thus, the systematic review is divided into two parts: the literature on sustainable tourism and the literature on Confucianism and Taoism. It is undertaken through five steps following the framework for systematic reviews suggested by Pai et al. (2004). The details of the five steps are as follows.

4.4.1 Step one: Formulating the review questions

The first step of a systematic review is to formulate the review questions. One crucial job for the systematic reviewer to do, however, is to ensure that the proposed review has not been done by others previously. As stated in Chapter One, little attention has been paid to the relationship between Chinese cultural values and tourism besides the topics on tourist behaviours and tourism marketing. No research has been done on interpreting sustainable
tourism using Chinese cultural values. The research review question is determined by the research question: Can Chinese cultural values offer a different understanding of sustainable tourism compared to existing ones? Sustainable tourism is currently basically a Western concept that has been created and interpreted based on Western cultural values. Aim two of the study is to reinterpret sustainable tourism in the light of Chinese cultural values. In order to achieve the aim, the existing understandings of sustainable tourism and key Chinese cultural values need to be reviewed, extracted and analysed.

Therefore, the review has two key objectives:

- To examine the understandings of the concept of sustainable tourism and its principles as reflected in the existing literature
- To extract key Chinese cultural values with regards to Confucianism and Taoism

4.4.2 Step two: Search and inclusion of data (literatures)

One distinct advantage of systematic reviews is their ability to identify and analyse as much of the literature relevant to the review questions as possible. For Study Two, there are two aspects of relevant literature: work centred on the concept of sustainable tourism and its principles, and work with regard to Confucianism and Taoism and their values. The books and journals that are relevant to the review questions are the source of data (literature). In respect to the review question seeking to extract key Chinese cultural values with regards to Confucianism and Taoism, both the relevant literature in English and in Chinese (including the classic works and critiques of Confucianism and Taoism) are included. In order to identify different understandings between Chinese and Western scholars, the Chinese literature on sustainable tourism is also taken into consideration.

4.4.2.1 Data for Study Two

When it comes to the data for the research, these are always grouped into two categories: quantitative data and qualitative data. Quantitative data refers to information that can be counted whilst qualitative data is non-numeric and has not been quantified (Saunders et al., 2009). Since Study Two is to analyse the concepts of sustainable tourism and Chinese cultural values and then find how well they fit together, the data for Study Two is defined to be the principles of sustainable tourism (data set one) and Chinese cultural values (data set two). This data is not ready-made but embedded in the relevant literature or documents. Among these documents, this study focuses on published books and journal articles. As
claimed by Rapley (2007), academic publications are a massive source of documents for research which can be either historical or contemporary. Both the historical and contemporary publications will be interrogated in Study Two. It has to be noted that all the literature selected are examples of conceptual research, since Study Two is a practice of conceptual research aiming to reinterpret the concept of sustainable tourism in the light of Confucianism and Taoism.

4.4.2.2 Sampling

The need to sample arises due to the impracticability of the researcher surveying the entire population due to budget, time or other resource constraints (Saunders et al., 2009). Sampling in qualitative research has long been undervalued as qualitative researchers have often claimed that it is not necessary for qualitative research (Gobo, 2007). In contrast, it is argued that sampling in qualitative research serves to increase the scope of data so that the research question can be illuminated better (Kuzel, 1992), although it is essential to define sampling units clearly in order to avoid messy and shallow research. Given the nature of social or cultural objects, the lack of a population list, and the phenomenon of non-response and so on, probability samples are rarely used in social science research. In other words, non-probability sampling methods, such as purposive sampling, quota sampling, the emblematic case and snowball sampling are most commonly used sampling procedures in qualitative research (Gobo, 2007). Two actions that are essential for effective sampling in qualitative research are to set boundaries within the limits of time and means, and to create a frame to help qualify the basic processes (Miles and Huberman, 1994).

Purposive sampling is effective in select cases with certain characteristics or extreme situations (Gobo, 2007). The researcher is able to select the cases which best meet the research question(s) and objectives (Saunders et al., 2009). This approach is useful in gathering sufficient of the required data efficiently. Patton (2002) suggests identifying the diverse characteristics (sample selection criteria) prior to selecting the sample. The sampling parameters depend on the framework and research question (Miles and Huberman, 1994).

In this research, for Study Two, there are thousands of published studies on sustainable tourism and Chinese culture respectively. In other words the population is too big even if one were to focus on the studies that fall into the category of conceptual research. Considering the limitations of time and resource, sampling is therefore needed. Purposive sampling is selected
as the sampling method because it best enables the researcher to meet the objectives of abstracting the principles of sustainable tourism and Confucian and Taoist values. Following Saunders et al. (2009), two types of purposive sampling are adopted: typical case sampling (to provide an illustrative profile using a representative case) and critical case sampling (to select critical cases on the basis that they can make a point dramatically).

The sample selection criteria for the required data set one are the literature that includes the most elements of, or consists of critical comments on, sustainable tourism. A typical case sample of data set one can be a review book, journal article or report of the development of sustainable tourism, such as the research report by Miller et al. (2007): *Public understanding of sustainable leisure and tourism: A report to the Department for Environment*. This focuses on the public’s understanding of, and views about, sustainable leisure and tourism, with the purpose of offering suggestions for government in respect to the supply of sustainable leisure/tourism opportunities. This literature is considered as a typical case because it presents the Western understanding of sustainable tourism which can be contrasted with Chinese understandings.

Another example of a typical case is the journal paper *Sustainable tourism: A state-of-the-art review* by Butler (1999). This reviews the development of sustainable tourism terms and discusses the conflicting definitions of the concept. Butler indicates that the principles of sustainable tourism should be distinguished and developed from those applied to sustainable development. This paper is considered as a typical case because it fits with the objective of Study Two: to analyse the concept of sustainable tourism. An example of a critical case for data set one can be found in Hunter’s (1995) article: *On the need to re-conceptualise sustainable tourism development*. It criticises the dominant paradigm of sustainable tourism development as being too tourism-centric and thus pays insufficient attention to the scope and geographical scale of tourism’s resource base and the intersectoral context of tourism development. It is a critical case in terms of challenging the dominant paradigm of sustainable tourism and re-conceptualising it with regard to its contribution to sustainable development.

The sample selection criterion for data set two is the literature that consists of most elements of Chinese cultural values. Since cultural values are indispensably linked to philosophy, a typical case can be a book on Chinese philosophy such as *An outline history of
Chinese philosophy by Xiao and Li (2008). This reviews the historical development of Chinese philosophy, reflecting the changing cognition of the general laws of nature, society and ideological trends. It surveys Chinese cultural values from traditional Confucianism and Taoism to contemporary materialism and idealism. Another example is a journal article by Fan (2000): A classification of Chinese culture, which identifies and classifies a list of 71 Chinese Cultural Values (CCVs). It is useful for abstracting the values based on Confucianism and Taoism. An example of a critical case is the journal article Rethinking Confucian culture by Li and Shi (2011). This critically discusses what Confucian culture really is with regards to its development, evolvement and innovation.

According to Saunders et al. (2009), there are no certain rules for defining the sample size of qualitative research due to the inherent ambiguity of non-probability sampling techniques. Since qualitative research aims to modify or confirm the existing theory or understanding in the selected certain context (Kuzel, 1992), the generalisations are not made to a population but the theory. Thus the sample size is dependent on the research question(s) and objectives. In other words, how many samples are needed is dependent on the usefulness and credibility within available resources (Patton, 2002). In Study Two, the sample size will be determined by data saturation. To be specific, more than enough samples will be collected to ensure that all the essentials of Chinese cultural values and sustainable tourism can be achieved. The data collection will be continued until no more essential information can be found or extracted. The sampling size and details of selection will be illustrated in the next relevant sections.

For data set one, 80 conceptual pieces of research on sustainable tourism were selected and analysed, including 56 journal articles and 24 books. Fifty-nine of these are typical cases, 18 are critical cases and three are both typical cases and critical cases due to the features of different chapters of the books. The details of these works, including the author(s), book or journal article, title, year published, conceptual research approaches used, main points and typical or critical case can be found in Table 8.1 in Chapter Eight.

Data set two, meanwhile, is divided into two parts: Confucianism and Taoism. According to Table 6.1, 52 works were selected to extract the ideas and values of Confucianism, within which 30 were journal articles and 22 books. Forty-four of these are typical cases, five are critical cases and three are both typical cases and critical cases. Since
Confucianism originated and developed in China, 15 of the selected studies are in Chinese since they are critiquing classic Chinese literature. A similar approach is followed in respect to Taoism in Chapter Seven. The sample size for Taoism is 29, comprising 14 journal articles and 15 books. Twenty-five of these are typical cases, two are critical cases and two are categorised as both typical cases and critical cases. Eight of these studies are in Chinese. To summarise, the sample size for Study Two is 161 (100 journal articles and 61 books), out of which 128 are typical cases, 25 are critical cases and eight are both typical cases and critical cases. The details of the sampled literature will be presented in sections 6.2, 7.2 and 8.2.

4.4.3 Step three: Quality assessment

Quality assessment is the process of evaluating the reliability, validity and trustworthiness of the research according to the research criteria. As stated in Chapter Two, quality criteria for conceptual research have not been defined clearly, which makes it difficult to evaluate how ‘good’ or ‘bad’ any particular piece of conceptual research is. In respect to Study One, however, the quality issues of conceptual research were discussed, which ensures its value. Meanwhile conceptual research does not sit in contradiction to quantitative or qualitative research, as indicated in Chapter Three. Since qualitative data and qualitative analysis method is used in Study Two, the evaluation of qualitative research can be adopted.

4.4.3.1 Reliability and validity of the study

Common criteria for measuring research quality emphasise the reliability and validity of the research design. Reliability is used to evaluate the extent to which the data collection methods and analysis process ensures the repeatability and consistency of the findings, whilst validity refers to how well a test measures what it is purported to measure or how truthful the findings are (Saunders et al., 2009). Reliability and validity were first considered systematically within the quantitative research tradition but have subsequently come to be evaluated within qualitative research (Seale, 1999). The establishment of validity and reliability means somewhat different things between quantitative and qualitative research, however (LeCompte and Goetz, 1982). This variety is reflected in modified terms (catalytic validity, transgressive validity, interrogated validity, etc.) that capture the difficulties in creating commonly agreed quality criteria for qualitative research due to its emphasis on creativity, exploration, conceptual flexibility and a certain freedom of spirit (Seale, 1999). Reliability in qualitative research refers to legitimate means of data collection and analysis that enable the production of rich and meaningful descriptions of phenomena, rather than to
obtain exactly the same results, as in quantitative research: different results do not mean that qualitative research is unreliable but that different studies have uncovered slightly different aspects or interpretations of the same phenomenon (Collingridge and Gantt, 2008).

The reliability and validity of Study Two is assured by the distinctive characteristic of both the systematic review and content analysis. The coding units in Study Two were developed based on previous studies involving similar coding objects (sustainable tourism principles and Chinese cultural values). In order to ensure the reliability and validity of Study Two, at least two coders participated in both the coding of the principles of sustainable tourism (the author is named coder 1 and another Chinese doctoral student in tourism is named coder 2) and Confucian and Taoist values (coder 1, coder 2 and a Chinese who is majoring in traditional Chinese literature, named coder 3).

4.4.3.2 Trustworthiness of the study

Seale (2007) argues that the philosophical position adopted does not influence the quality of research. Evaluating the quality of research from different paradigms is a difficult task, however (Kuhn, 1996). Consequently, there is a need for different terms to judge the quality of qualitative research. As Healy and Perry (2000) asserted, the quality of research in different paradigms should be evaluated by their own paradigm’s terms. Reliability and validity are criticised to be terms more appropriate for quantitative research (in the positivist paradigm) and different terms have thus been created for qualitative research (in the post-positivist, interpretivist or constructivist paradigms). The most distinct and commonly agreed such term is ‘trustworthiness’ proposed by Lincoln and Guba (1985). They developed four criteria of trustworthiness that paralleled the quantitative criteria terms. The first criterion is credibility, a term corresponding with internal validity (truth value), which is concerned with how truthful the findings are. Secondly, transferability is conceptualised to replace external validity (applicability) to assess how applicable the research findings are to another context or group. Dependability is paralleled to reliability as a judgement of the consistence and reproducibility of the results. Conformability is a criterion designed to replace objectivity (neutrality) to evaluate whether the findings are neutral or a production of the researcher’s biases and prejudices.

Trustworthiness requires that research is able to “demonstrate truth value, provide the basis for applying it, and allow for external judgements to be made about the consistency of
its procedures and the neutrality of its findings or decisions” (Erlandson et al., 1993, p.29). Both) and the following researchers (Seale, 1999; Harrison, MacGibbon and Morton, 2001; Morrow, 2005; Rolfe, 2006) suggest how to ensure trustworthiness in qualitative research with regards to the four criteria. Particularly, Decrop (1999, 2004) focuses on trustworthiness in qualitative tourism research and how to achieve it. Credibility can be enhanced through prolonged engagement, persistent observation and referential adequacy (Decrop, 2004). This study does not refer to these issues and cannot adopt these techniques, however. Member checking is considered to be the most effective way to enhance credibility (Lincoln and Guba, 1985; Shenton, 2004; Decrop, 2004). Since Study Two does not involve participants (interviewees for example) no informants can be invited to check the accuracy of the transcripts of dialogues, but member checking can be is used in other ways (e.g. peer checking) such as member checking of coding (at least two coders) and data interpretation.

Transferability can be gained by using purposive or theoretical sampling (Decrop, 2004). As illustrated in the last section, Study Two uses purposive sampling (typical case sampling and critical case sampling) and various samples are selected to ensure the broadest range of information. The researcher is required to provide sufficient contextual information about the study to enable readers to make a transfer (Shenton, 2004). The detailed illustrations of rationale and research settings in Chapter One provide an explication of contexts and the researcher’s orientation. Dependability can be increased by having a research plan, through prolonged engagement and the use of an ‘auditor’ (Decrop, 2004). In this study, apart from a research plan, the supervisors act as auditors, providing a second opinion in respect to data interpretation or the research process. On the other hand, the research design and its implementation are explained in detail in the sections Philosophical Position of the Study (2.3.2), Searching for Possible Research Methods for Study Two (2.4), Method used in this chapter (3.3) and Research Process of Study Two (4.4). These efforts help to ensure that similar results would be obtained if the study were to be repeated. Auditors can also be used to enhance conformability. Supervisors and peers invited within different cultures and genders minimise the effect of the researcher’s biases and prejudices.

Apart from the above individual techniques, the most comprehensive way to achieve trustworthiness is triangulation (Shenton, 2004; Decrop, 1999, 2004). This is also adopted in Study Two. Triangulation is the combination in one study of two or more data sources, investigators, methods, theoretical perspectives (Thurmond, 2001). Data triangulation in this...
study refers to the variety of data sources (books and journal articles in English and Chinese). Method triangulation involves the use of multiple methods (systematic review, content analysis and conceptual research approaches) to enhance credibility and dependability. The involvement of supervisors and peers in this study represents the adoption of investigator triangulation. Theoretical triangulation pertains to the use of multiple perspectives to interpret the data (environmental perspective, social-cultural perspective and economical perspective in interpreting sustainable tourism; philosophical perspective, social-cultural perspective and psychological perspective to interpret cultural values). This can also be considered as interdisciplinary triangulation.

4.4.4 Step four: Data extraction and analysis

The aim of this step is to extract and analyse the data. Since Study Two uses books and journal articles as its data, according to the discussions in Chapter Two and the above section, content analysis is adopted as the method for data analysis. The details of the content analysis, and how it underpins the findings, will be presented in Chapters Six to Eight. Here, following Rapley (2007), seven steps and key points of content analysis for Study Two are listed as follows:

- Formulate the initial research questions. This has been done in step one of the systematic review process.

- Create a research diary. As for Study Two, a research diary has been started as soon as the study began.

- Find possible sources of material and begin to generate an archive. For Study Two, this step is consistent with the data collection process.

- Sceptically read and interrogate the text. All the selected books and journal articles are carefully interrogated with the intention of noticing the absent feature of the texts, and focusing on how the different elements of the text combine to consolidate or disrupt the meaning, and to arrange the debates that emerge in the texts into orders so as to trace their patterns and similarities, as well as to spot any disjuncture. Notes were taken during this process. Given that this is conceptual research, the critical and ideological critiques are addressed.
Coding. The purposes of coding are to transfer the raw data into a standard format and reduce it to a manageable size. In Study Two, the coding is divided into two different processes. As discussed in previous sections, the twelve themes (approaches indicating how conceptual research is carried out) proposed in Study One should be applied in the data analysis process for Study Two as a practice of conceptual research. The first coding process therefore adopts the twelve themes (Defining concepts, Comparing concepts, Historical analysis of concepts, Constructing conceptual typologies, Mapping the scope of concepts, Exploring the purposes of concepts, Deconstructing concepts, Applying concepts to practice, Synthesising concepts, Translating concepts to new contexts, Finding conceptual gaps, Proposing new concepts /Reconceptualisation) as the first category of coding units. Since these are ready-made coding units, the only thing required is to subdivide them into sub-coding units. For example, theme one ‘Defining concepts’, is subdivided into ‘Defining Confucianism’, ‘Defining Taoism’ and ‘Defining sustainable tourism’. This process was done by coder 1 only (the author) since it just requires the application of the twelve conceptual research approaches.

The second coding process is undertaken to summarise and abstract the principles of sustainable tourism, the Confucian values and the Taoist values. It is carried out by adopting theme nine Synthesising concepts. Confucian values are coded into eleven units which are 仁 ren (Benevolence/ Humanity), 义 yi (Righteousness/Justice), 礼 li (Propriety), 智 zhi (Wisdom) and 信 xin (Trustworthiness), 忿 shu (Empathy/Reciprocity), 忠 zhong (Loyalty), 孝 xiao (Filial Piety), 修己 xiuji (Self-cultivation), 长远观 changyuan guan (Long-term Orientation), and 和 he (Great Harmony). Taoist values are coded into three units which are 道 Tao/Dao (The Way), 无为 Wu Wei (Inaction/No-action), 阴阳 YinYang (Yin and Yang). This work was done by three coders: the
author (coder 1), another Chinese doctoral student in tourism (coder 2) and a Chinese who is majoring in traditional Chinese literature (coder 3). All three coders are familiar with Chinese culture. The coding units were first developed by the three coders individually and then amended after discussion. It should be noted that the process was repeated several times until agreement was reached.

The principles related to sustainable tourism are coded into seven units, which are: Meet the needs of present tourists; Meet the needs of future tourists; Long-term consideration of future tourism; Satisfy the demands of tourists, benefit the host communities, and maintain the quality of the environment which tourism depends on; Balance the environmental, economic and social impacts of tourism; Make good use of environmental resources and other resources through natural conservation and management; Involvement of and education among all the stakeholders. The author (coder 1) and another Chinese doctoral student in tourism (coder 2) generated the categories individually and then discussed them several times until agreement was reached.

- Analyse the data by examining regularity and variability in the data and forming tentative findings. Qualitative content analysis is used. The literature in the sample is carefully read and re-read one-by-one and comprehensive notes are taken according to the coding units.

- Check validity and rigour. Analysis and findings do not represent the end point of the research. It is essential to check the validity and rigour in order to ensure the quality of the research outcomes. Several peers, both within and outside of tourism academia (and with different cultural values) are invited to check the study including data selection, the data analysis process (especially for coding) and data interpretation, in order to enhance the research quality.
4.4.5 Step five: Synthesis and interpretation

During this final stage, the synthesised study results are interpreted. The outcomes include the clarification of Confucianism and Taoism and the synthesis of their values; the clarification, deconstruction, and reinterpretation of the concept of sustainable tourism. It consists of four chapters. Since Study Two is the practice of conceptual research, the findings are formed and interpreted by adopting the twelve themes of conceptual research approaches. The twelve themes, however, are a summary of all the approaches commonly presented in conceptual research. In other words, they might not all appear in one piece of research. Which of the themes can be used in this study needs to be discussed, therefore.

Theme one Defining concepts is the most common issue in conceptual research because it is the basic cornerstone underlying the analysis of concept(s). In Study Two, the core concepts of Confucianism, Taoism and Sustainable Tourism need to be defined before doing further analysis, which means theme one will be adopted in Chapter Six, Chapter Seven and Chapter Eight. Theme three, Historical analysis of concepts, will be presented in Chapter Six, Chapter Seven and Chapter Eight to review the origin, development and evolution of the concepts of Confucianism, Taoism, and Sustainable Tourism. The existing understandings of the concept of sustainable tourism are basically Western and thus need to be critiqued by examination of their cultural and philosophical bias. Theme seven, Deconstructing concepts, is therefore utilised in Chapter Eight to designate the rationale of interpreting sustainable tourism based on Chinese cultural values.

Since the Confucian and Taoist values, and the principles of sustainable tourism, are contested across the range of literature analysed, theme nine, Synthesising concepts, is adopted to synthesise and abstract them in Chapter Six, Chapter Seven and Chapter Eight. The aim of Study Two is to reinterpret sustainable tourism in the light of Confucian and Taoist values. In order to achieve this aim, the Confucian and Taoist values are translated to the context of sustainable tourism in Chapter Nine. This is the adoption of theme ten, Translating concepts to a new context. Based on these discussions, the concept of sustainable tourism is reconceptualised with regards to Confucian and Taoist values (theme twelve, Proposing new concept/Re-conceptualisation).
The adoption of the themes of conceptual research approaches in Study Two is outlined in Table 4.1. Study Two concentrates on the concepts of Confucianism, Taoism and sustainable tourism without the involvement of other concepts, so theme two Comparing concepts is rejected. Theme four, Constructing conceptual typologies, is not selected since no categories of concepts are referred to in Study Two. Since the core of the analysis of the concepts is concentrated on understanding and interpretation rather than their scope or boundaries, theme five Mapping the scope of concepts is excluded. There is no Exploring the purposes of concepts (theme six) involved in the chapters of Study Two. All the discussions of sustainable tourism are conceptual rather than focused on how to apply them in practice, which explains why theme eight Applying concepts to practice is rejected. Since the conceptual gaps in the existing knowledge of sustainable tourism is discussed in Chapter One when explaining the rationale of the study, theme eleven Finding conceptual gaps is not repeated in Study Two.

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4.5 Advantages and limitations of the method

The advantages (objective, systematic, transparent and replicable) and limitations of systematic reviews (inaccessible to decision-making, yielding different answers to the same question, not effective in data analysis) have been presented in Chapter Two. Study Two is designed to provide an alternative understanding of sustainable tourism. Bias (both of the researcher and of the selected publications) is minimised due to the broad range of relevant literature used. Since both the typical and the critical literatures on Confucianism, Taoism and sustainable tourism are included, objectivity is improved. Some limitations remain, however. The identified and selected literature is limited due to the restrictions of time and resources inherent in doctoral research. The systematic review is undertaken by the author himself rather than by teams, as is often the case. Since the review refers to some Chinese
literature, it cannot be duplicated unless by people who know Chinese well. Bias may exist when translating works into English.

4.6 Ethical Issues

Ethics are an essential component of the research process. Research ethics questions how the research topic is formulated and designed, how the researcher gains access, and how the data is collected and analysed (Saunders et al, 2009). In order to ensure the research is carried out in a proper way, ethical issues have to be taken into consideration throughout the research process (Neuman, 2000). Research ethics require that the research design should be methodologically sound and morally defensible to all those involved in it (Saunders et al, 2009). As a piece of research that uses literature as data and qualitative content analysis, there are no interactions with participants or authors of the books and articles in any form. These possible ethical issues are avoided, therefore. Since this research does not refer to any participants, all the ethical issues are concentrated on the conduct of the research itself. In this regard, the researcher tried his best to be rigorous throughout the whole process, from the objectives to method selection, and from the data selection to interpretation. To enhance the transparency of the study the researcher took cultural difference into account and tried his best to interpret it in a way that would be easy people not familiar with Chinese cultural values to understand.

4.7 Conclusions

This chapter has explained the design of the study and the methods used for Study Two from the research process perspective. The research is separated into Study One and Study Two according to the objectives. Study One, the theory of conceptual research, dealt with objective one of the study: to clarify what conceptual research is and how it is carried out. Utilising CABABS for data mining and content analysis as the method, objective one was achieved with the completion of Chapters Two and Three. Study Two is the practice of conceptual research. A systematic literature review is combined with content analysis and conceptual research approaches are selected as the method for Study Two due to the characteristics of the data.

Five steps are listed as encompassing the process of the systematic review. Books and journal articles on sustainable tourism and Confucianism and Taoism are considered as the data. Typical case sampling and critical case sampling are used to filter the data. Qualitative
content analysis is selected as the data analysis method. Coding is divided into two different processes: the twelve themes of conceptual research, and a coding process for summarising and abstracting the principles of sustainable tourism, the Confucian values and the Taoist values. The interpretation of findings is undertaken by adopting the twelve themes of conceptual research approaches. Seven of the twelve themes are adopted, with some of them appearing several times. The quality of this study depends on the fitness of the methods and the trustworthiness. Ethical issues are also taken into consideration during the process of the study.
Chapter 5 Knowledge, Culture and Values

5.1 Introduction

Since the rationale of this study arises from the trend of the “methodological turn” and the “cultural turn” of tourism knowledge creation, it is necessary to develop an understanding of knowledge in terms of nature and validity. In this regard, Study Two (the practice of conceptual research) is involved in the analysis and discussion of traditional Chinese cultural values. It is necessary to develop an understanding of culture and values in terms of meaning and characteristics. Chapter Five therefore aims to build a theoretical underpinning for Study Two. It firstly presents the nature of knowledge and the validity of social knowledge, followed by a discussion of the knowledge produced in this study. Then, by analysing the concept of culture, it is found that values are the core component of culture. So it goes further in discussing the concept and nature of values. Compared to the culture dimensions model, cultural values are considered to be a more effective way to analyse culture in detail, especially in respect to culture differences. The existing Chinese cultural values models are criticised as not suitable for Study Two, while Confucian values and Taoist values are selected. Finally, conclusions are drawn.

5.2 Knowledge

5.2.1 The nature of knowledge

The primary question encountered here is what knowledge is. According to Merriam Webster’s Collegiate Dictionary (2013), “knowledge is acquaintance with or understanding of a science, art, or technique”. Based on the verb forms used in defining knowledge by the Oxford English Dictionary, Davenport and Prusak (1998) define knowledge as “a fluid mix of framed experience, values, contextual information, and expert insight that provides a framework for evaluating and incorporating new experiences and information. It originates and is applied in the minds of knowers.” (p. 5) Knowledge sometimes has specific definitions in different fields, hence knowledge in social work refers to that which can be known through the techniques of empirical science (Imre, 1984). The sociology of knowledge is concerned with the analysis of how people construct reality in relation to society or, in other words, cultural context (Berger and Luckman, 1966).
According to Fenstermacher (1994), the nature of knowledge refers to these questions: the forms, the means of justification, the differences from relevant concepts (for example belief), and the way of figuring into different conceptions of science and human reasoning. The forms knowledge takes depend on human mental programming while the justification directs to the validity of knowledge. There are three levels of human mental programming: individual, collective and universal (Hofstede, 1980, see Figure 5.1). The individual level is the one that forms individual personality, while the collective level is shared with some but not all people, and the universal level is the most basic and is shared by all human beings. Correspondingly, knowledge can be classified into individual knowledge, collective knowledge and universal knowledge. Individual knowledge only makes sense for individuals and cannot be easily shared and studied (such as James knows his favourite food is grilled chicken but others are not aware of that). Collective knowledge is the cornerstone of social science (for example Confucianism is the knowledge for Chinese) whist universal knowledge is that of natural science (mathematics such as one plus one equals two). But this is not to say that social knowledge is exclusive of the universal level (common shared social knowledge exists). Berger and Luckman (1966) claim that human knowledge is given in society as a priori to individual experience, which means that individual knowledge is created based on the collective.

5.2.2 The validity of social scientific knowledge

When it comes to knowledge, there is always a debate as to its validity. Natural science and social science are deemed to be two categories of the constructs of human knowledge. Natural science, which deals with universal knowledge, is easily able to obtain consensus, while social science (often qualitative research) tends to be considered as subjective (Kvale, 1995). Social science is often criticised with respect to its validity (Enerstvedt, 1989). The Western world’s, particularly the Anglo-Saxon world’s, pursuit of knowledge resulted in the triumph of natural science while the classical social doctrines struggled due to the precondition with social affairs (Mannheim, 1979). The arguments for the validity of social science centre on the ‘objects of study’ which are humanly made. The one who observes is necessarily a participant and different methods of establishing evidence and interpretations are inevitable (Williams, 1958).
The Anglocentric meaning of objective is to be impartial, without preferences, prejudices or biases, presenting the facts without preconceived values (Mannheim, 1979). These benchmarks themselves, however, may mean different things for people from different cultural backgrounds. How to and who can judge what is prejudice and bias are esoteric questions. The relationships between cultural values and intellectual activities (the distorting influence if cultural values and interests on knowledge) means that social knowledge is inherently ‘subjective’. Objectivity is thought not to exist in the study of social reality so that the social scientists can only try to be “inter-subjective” through the integration of a variety of subjective views (Hofstede, 1980). What sociologists need to do is to consider different ‘subjectivities’ rather than propagating a dominant one.

Its subjective feature does not mean that social knowledge is invalid, however. According to Mannheim (1979), valid knowledge refers to the avoidance of prejudices and biases, formulating views with critically self-consciousness, and developing sound methods of observation and analysis. As long as the process of creation is following the proper methods, the knowledge is valid even though it is not universal.

5.2.3 Knowledge and epistemology, ideology
The understanding of knowledge varies between different epistemological systems (positivism, interpretivism, constructivism and so on). Schommer (1990) claims that
epistemological beliefs have effects on the comprehension and learning of knowledge. Epistemological beliefs are built on the background of culture, home and education. Imre (1984), therefore, indicates that epistemology, a branch of philosophy that deals with the theory of knowledge, is a very important issue in research. Two factors hinder the progress of social knowledge: the one allows dominant powers to legitimate the knowledge which is compatible with their interests; the world of science itself from the physical to social realm, resulting in confusion and misunderstanding (Mannheim, 1979). That is to say knowledge is not interest free but is contested, especially social knowledge.

The epistemological beliefs on nature and truth determine the forms and range of knowledge. Postmodern theory seeks to discover constant truths and universal principles of human nature (Kahn, 1999) and thus focuses on universal knowledge. In contrast, the deconstruction of postmodern theory deems universal values as impossible to achieve since there is no ultimate reality, since what is considered true, objective, logical, or rational in one culture or group may not be so elsewhere (Gibson, 1996); hence this approach deals with collective knowledge. Affirmative postmodern theory maintains that knowledge is neither objective nor subjective because knowledge is grounded in socially constituted relations, bounded by community (Kahn, 1999). The world is as rich and varied as human life itself and thus statements of ‘truth’ need to give way to multiple interpretations and differing value judgements. As has been claimed by Dann, Nash and Pearce (1998) and Urry (2002), Western ontologies and epistemologies are not the only ways of knowing and interpreting the world.

Ideology is used in the sociology of knowledge to analyse how knowledge and beliefs are determined within societies or cultural contexts (Edgar and Sedgwick, 2007). According to Ball and Dagger (1999), the word “ideology” is the familiar features of ideas and power that influence the values and beliefs of people, either as individuals or groups. The scepticism of the ideas advanced by opponents (i.e. the true recognition of the world which may not be in accord with their interests) is described as the particular meaning of ideology. The particular conception of ideology considers only a part of the opponent’s assertions as ideologies with a purely psychological level analysis (Mannheim, 1979). The total meaning of ideology is the ideology of an age or of a concrete historic-social group (the characteristics of their world-view or general perspective). This indicates that all human thought is inevitably influenced by the social context (Berger and Luckman, 1966).
Ideology is used in Marxism to explain that the dominant class determines the knowledge of the world (especially of the social world) according to their interests. Marx argues that people from different sections of society understand the world in different ways and thus there are various ideologies judging multiple truths. Each ideology has its own standards of truth depending on these different social contexts (Edgar and Sedgwick, 2007). As long as the conflicting classes live in and try to represent the same world, the contest was inconceivable (Mannheim, 1979). Moreover, ideology exists not only among social classes, but also genders, generations and nationalities. There is no right or wrong ideology, but various knowledge seeking to understand the world. What is more, while “knowledge” and “truth” are the major issues of concern for Western philosophers, Chinese philosophers emphasise “action” and “practice” (Hwang, 1995). “Action” and “practice” are also forms of knowledge according to the Western understanding. Researchers therefore need to avoid epistemological and ideological bias in knowledge creation and authentication.

5.2.4 Knowledge in this study

Tourism is undoubtedly a branch of social science and thus tourism knowledge belongs to social knowledge. Tourism knowledge creation was discussed in Chapter One in terms of epistemology, methodology and injustice. The validity and trustworthiness of the knowledge produced in this study was expounded in Chapter Four. Based on Lewin’s (1935) theory of force-fields, Tribe (2006) develops a knowledge force-field model (see Figure 5.2) to illustrate the relationship between tourism phenomena and tourism knowledge. All the five knowledge force-fields (person, rules, position, ends, and ideology) may lead tourism knowledge into different directions or interpretations. Based on the discussions in the above section, ideology seems to play a more important role in leading to multiple truths about tourism. As Tribe (2006) indicated, researchers need to consider the particular ideologies they operate within and open their minds to the knowledge beyond their own ideologies. Only when the multiple ideologies involved in tourism knowledge creation are revealed and understood can the canon of knowledge (circle 3) reflect a full range of tourism phenomena (circle 1).
Since ideology, as a belief system, is determined by societies, which are in turn distinguished by the cultures and values within them, various cultural values should be taken into account in the pursuit of truths about tourism. With the wide identification of the distinction of Chinese cultural values, new theoretical possibilities should be developed separate from the paradigm of Western cultural tradition (Lu, Gilmour and Kao, 2001). This should also be advocated in tourism. As indicated in Chapter One, tourism knowledge creation is dominated by Western cultural values while other values are overlooked. There has been a call to readjust the privileging of Western world views and epistemologies to (re)interpret tourism outside Western contexts (Jennings, 2009). Specifically, Chinese cultural values are overlooked in understanding the concept of sustainable tourism. This research seeks to extend the understandings of sustainable tourism through an exploration of Chinese cultural values. The existing cultural values reflected in sustainable tourism theories can be summarised through interrogation of plenty of existing studies (most of which are from Western perspectives). There will be some overlap, however, between Chinese cultural values and the cultural values reflected in existing sustainable tourism theories. The aim of Study Two is to figure out what Chinese cultural values fit with existing ideas of sustainable tourism in order to make a contribution to the knowledge of sustainable tourism.
5.3 Culture

5.3.1 The concept of culture

It is difficult to define ‘Culture’ because it can have different meanings in different contexts so that the studies of culture refer to several aspects in sociology, history, ethnography and literary criticism, and even socio-biology (Edgar and Sedgwick, 2007). The word ‘culture’ originates from its Latin meaning: the cultivation of soil. It was first used as a noun in the late eighteenth century (Williams, 1958). According to Edgar and Sedgwick (2007), the ability of human beings to construct and to use language are the two most important elements of culture. Although culture is used with the meaning of “a developed state of mind” (a cultured person) or “a process of the development” (cultural activities), the most common meaning is the means of these processes (human intellectual works), the anthropological and sociological way of life to distinguish people (Williams, 1958). A broader view of culture emphasises it as a general signifying system (Williams, 1958).

Tylor’s Primitive Culture (1871) defined culture as “that complex whole which includes knowledge, beliefs, art, morals, laws, customs and any other capabilities and habits acquired by man as a member of society” (p. 1). Hofstede (1980, p.21) considers culture as “the collective programming of the mind which distinguishes the members of one human group from another” or “the interactive aggregate of common characteristics that influence a human group’s response to its environment”. This programming is the result of living within a society and learning which ways of behaving are accepted and which may be unacceptable and lead to exclusion.

Culture is also treated as a symbolic system which is characterised in some general way and on which ideological principles are based (Geertz, 1973). The proposition that all cultural practice is ‘ideological’, however, means no more than that all practice is significant (Williams, 1958). Culture is one kind of human social knowledge and thus cultural studies is a branch of social science. Cognitive anthropology considers culture to be the psychological structures which are developed in certain societies to guide the behaviour of individuals (Geertz, 1973). Sometimes culture is even defined based on problem solving, such as “traditional problem solving through accepted responses that have met with success” (Ford, 1942 p.546) and “a group problem-solving tool that enables individuals to survive in a particular environment” (Moran and Stripp, 1991, p. 43).
From the above definitions, it can be concluded that culture is a complex concept that consists of preferences and behaviours in respect to beliefs and values, determining those within a certain group of people. In other words, culture is primarily a manifestation of core values.

5.3.2 Relationship between culture and values

As early as the 1950s, values were included as a core concept in the definitions of culture. Kluckholn (1951) describes culture as shared patterns of thinking based on values. He especially stressed the attached values in the definition. Hofstede (1980) is outstanding in this field because he attached so much importance to values within culture that he combined the two into cultural values and used it to measure culture.

Values are one of the components of culture apart from symbols, rituals, artefacts, and heroes (Morris and Schindehutte, 2005). According to Bryan (1954), values are one of the constituents of culture, which is as important as the other two (surface behaviour and perception). Surface behaviour refers to the most obvious physical manifestations of culture: exchanges of greetings, attitudes towards punctuality, expressions of emotion, and so on. Values are the principles held by a group of people in respect to what is important, good or bad. These values influence individuals’ cognitions, attitudes and behaviours. The approach to problem solving is also determined by values. The mental process of perception refers to how individuals, and the groups to which they belong, see the world around them and thus underpins values and surface behaviour (Hopkins, 2009). Pollay (1983) claimed that the characteristics of one culture can be reflected by its core values and their hierarchy, as well as the rules of dominance in their application. Specifically in the context of this research, even a detailed understanding of those surface behaviours is of little value to the understanding of sustainable tourism; and perception is too abstract and difficult to measure. To analyse the relevant values is therefore a good way to attain a deeper understanding of the concept of sustainable tourism. Each culture has its own distinctive value systems and orientations which are referred to as cultural values (Kluckholn and Strodtbeck, 1961). As Rarick (2008) claimed, it is necessary to explore the sources of the values in order to truly understand a culture, and this is especially true of Chinese culture. The following section is going to clarify what “values” are and the nature of values so that a deep analysis of values can be achieved.
5.4 Values

5.4.1 The concept of values

The term “value” or “values” is used variously in social science. It is defined as “a broad tendency to prefer certain states of affairs over others” (Hofstede, 1980, p.33). To value something means to ascribe worth to it, and in other words to consider it very important (Edgar and Sedgwick, 2007). A value is an “enduring belief that a specific mode of conduct or end-state of existence is personally or socially preferable to an opposite or converse mode of conduct or end-state of existence. A value system is an enduring organisation of beliefs concerning preferable modes of conduct or end-states of existence along a continuum of relative importance (Rokeach, 1972, p. 5)”. Values are the standards for people in defining what is good or bad, important or insignificant, and useful or not useful (Bryan, 1954).

Theory of Value or Axiology is a branch of philosophy that originated in the end of the 19th century and which studies judgements about value (Saunders et al., 2009). Values are argued to be the guiding reason of all human actions by Heron (1996). People acquire their values early in life, mainly through the society and context in which they grow up (family, school and other familiar people). The values gained from these experiences are fundamental values. The values are integrated into an organised system with a hierarchy once they are learned or adopted. Although the hierarchy is relatively stable in nature, it may change over time as experiences accumulate. Although different in terms of personal history, individuals are exposed to and affected by the same social events in the period during which values are being formed, and this creates a commonality among them (Massey, 1979). People, therefore, have different value systems as well as stability due to their unique experiences.

5.4.2 The nature of values

Gordon (1965) indicates that the basic difference between knowledge and values is that knowledge denotes the picture man has built up of the world and himself as it is, while values reflect what man prefers or would want to be. Just as knowledge is contested, people tend to struggle to sustain their own values against an assault from others. Kluckhohn (1951) produced a distinction between values as the desired and the desirable, as well as some associated distinctions (see Table 5.1). Hofstede (1980) interpreted the distinctions as follows. The nature of a value is divided into the desired (what people actually desire) and the desirable (what people think ought to be desired). Values have both intensity and direction.
Intensity refers to the extent of its relevance for people, and direction stands for the preference of choice such as “good” or “bad”, “more” or “less”. The desired norm of value is statistical and pragmatic which is held by the majority while the desirable norm tends to be absolute and ideological. There is a debate, however, as to whether absolute values exist, or only relative ones, since man is the source of values and meanwhile their instrument. Values are not equal to deeds because human behaviours are not only dependent on the person but also the situation.

**Table 5.1 Distinction between the Desired and the Desirable and Associated Distinctions**

<table>
<thead>
<tr>
<th>Nature of value</th>
<th>The desired</th>
<th>The desirable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimension of value</td>
<td>intensity</td>
<td>direction</td>
</tr>
<tr>
<td>Nature of corresponding norm of value</td>
<td>Statistical, phenomenological, pragmatic</td>
<td>Absolute, deontological, ideological</td>
</tr>
<tr>
<td>Corresponding behaviour</td>
<td>Choice and differential effort allocation</td>
<td>Approval or disapproval</td>
</tr>
<tr>
<td>Dominant outcome</td>
<td>Deeds and/or words</td>
<td>words</td>
</tr>
<tr>
<td>Terms used in measuring instrument</td>
<td>Important, successful, attractive, preferred</td>
<td>Good, right, agree, ought, should</td>
</tr>
<tr>
<td>Affective meaning of this term</td>
<td>Activity plus evaluation</td>
<td>Evaluation only</td>
</tr>
<tr>
<td>Person referred to in measuring instrument</td>
<td>Me, you</td>
<td>People in the general</td>
</tr>
</tbody>
</table>

*Source: Hofstede (1980, p.20)*

Values differ from practices because they are formed and adopted in early life and are relatively stable, while practices are learned later based on the value system and can be altered. Practices can be learned from others, symbols, heroes and rituals (Hofstede, 1991). Differences in values are the crucial element in clarifying national culture while differences in practices are subordinate (Hofstede, 1991). Similarly, Lachman (1983) claims that the values located on the top of the hierarchy of the value system are more central or important than others, and they can be called “core values”. They are formed in early life and then reinforced throughout life (Lachman, 1983). Similar to Hofstede, Lachman also asserts that the core values of people in a society represent the most important component of culture. According to Thio (1999), there are two dimensions of values. The first dimension is cultural values, which are shared by a group within society and relate to opinions as to what is good, desired and important, and individual values which are the special ones held by individuals. The second dimension is divided into traditional values, which are the important elements of
cultural meaning systems, formed hundreds of years ago and passed on through learning from one generation to another (Hyun, 2001), and modern values which are generated in recent years. In order to find out what Chinese culture can offer to the understanding of sustainable tourism, therefore, this study will focus on the traditional Chinese cultural core values rather than the individual values or modern values.

5.5 Cultural values in this study

A general question encountered by researchers who study culture is how culture can be measured. There are mainly two factions: Hofstede and his followers, and the ones using cultural values. In the study of work-related values, Hofstede (1979, 1980, 1982, and 1983) developed a famous theory on culture which is named as Hofstede's Culture Dimensions. Based on the study of 150,000 individuals from different social contexts, they developed four dimensions of culture: individualism/collectivism, power distance, uncertainty avoidance and masculinity/femininity. The first dimension, individualism/collectivism, distinguishes to what extent people in a country “prefer to act as individuals or as members of groups” (Hofstede, 1994, p. 6). If people tend to take care of themselves and their families, it is considered as individualism. In contrast, if people tend to characterise themselves as members of groups in which they can be looked after and with which they exchange their feelings and show loyalty to, it is collectivism (Hofstede, 1980).

Power distance refers to the extent to which subordinates respect their supervisors or the people in higher positions in the hierarchy (Hofstede, 1980). Uncertainty avoidance is the attempt to avoid uncertain and ambiguous situations with a preference of stability and formal rules (Hofstede, 1980). It is different from risk avoidance because it values clear rules and guidance rather than unwillingness to take or avoid risk (Hofstede, 2001). Masculinity and femininity argue for whether the dominant values in society are masculine or feminine (Hofstede, 2001). Based on a further study on the Chinese people, Hofstede and Bond (1988) proposed Confucian dynamism as a fifth dimension of culture which refers to a long-term orientation or a short-term orientation.

Although well accepted and widely promoted, the five dimensions in Hofstede's culture dimensions have been criticised as being too simplistic and for overlooking the substantial variations within cultures, as well as being inadequate in presenting the differences between cultures in detail (Lu, 1998). Schwartz (1990) argued that Hofstede’s culture dimensions fail
to recognise the interrelated nature of the terms in meeting universal goals and requirements such as survival and social interaction. The defined meanings and operation of Hofstede’s culture dimensions are considered as Western framework (Lu, 1998) because it was developed from a Western perspective that might be “culture bound” (Chinese Culture Connections, 1987). As Hofstede himself agreed, the weakness of his model lies in the use of research tools modelled according to Western values (Yin, 2003). Take the term “collectivism” as an example, the Chinese translation of it in mainland China is “jiti zhuyi”, which is a moral attribute and communist ideology, calling for a total devotion and sacrifice of self to the communities and the state. On the other hand, some specific cultural values cannot be effectively explained by Hofstede’s culture dimensions, such as protecting “face” (Mianzi in Chinese).

Another popular way to measure culture is using cultural values. As Lin (2001) claimed, identifying and locating the core values of a culture is particularly important for cultural studies. Although values are agreed to be a core component of culture, there are different opinions as to which values matter (Morris and Schindehutte, 2005) or what values should be measured (Pollay, 1983). Rokeach (1973) developed a well-known survey with the purpose of measuring the importance of 36 values (see Figure 5.3) that consist of 18 terminal values (desired end-states) and 18 instrumental values (desire modes of action) scored by respondents; this is widely referred to as the Rokeach Value Survey.
As Grant (1997) states, it is impossible to achieve universal values since there is no ultimate reality but language is also undeserving of our acceptance. Schwartz (1999) argues that theories of cultural values have failed to capture a full range of potentially relevant value dimensions, only focusing on limited aspects. There are arguments about the validity of the methodologies that have been used to develop the values, and whether or not they reflect a Western cultural bias (Hopkins, 2009). Some values are specific to a certain culture, e.g. the Unity of Yin and Yang only exists in Chinese culture. Some values considered as Chinese, however, such as filial piety, exist in other cultures, although they may be more significant in Chinese culture (Matthews, 2000). On the other hand, as the meaning of terms is always culturally specific, Chinese and Western scholars would necessarily have attached their own linguistic and cultural understanding to the respective values (Lu, 2010). A Chinese cultural values model should therefore be developed in order to analyse Chinese culture rather than applying the Western ones incondite to Chinese culture.
Different cultural values should be concentrated on according to the specific research questions and objectives. Those such as Hofstede’s Culture Dimensions (1980) and Schwartz’s (1999) model are designed to explore work related to cultural values; Kim, Atkinson and Umemot (2001) and Carter (1991) focus on certain cultural values and their implications for counselling; Nyambegera, Sparrow and Daniels (2000) use their model to explain how cultural value orientations affect human resource management preferences.

Study Two seeks to reinterpret sustainable tourism in the light of Chinese cultural values. The “culture” in Study Two refers to the national culture, excluding the organisational and professional ones. The discussions of Chinese cultural values in the study are not intended to ignore the differences between sub-cultures but rather to extract the common representative Chinese cultural values which that relate to sustainable tourism. As claimed by Xiao and Yang (2002), however, there is no clear definition or identification of Chinese cultural values. Nonetheless, an outstanding identification is the Forty Chinese cultural values (see Figure 5.4) which are developed by Chinese Culture Connection (1987) based on The Chinese Value Survey. These can basically reflect the beliefs and guidance of conduct for Chinese people.

Since so many Chinese cultural values have been identified, the questions emerging are “what Chinese cultural values need to be analysed in Study Two? Is this model of Chinese cultural values suitable for the analysis of the concept of sustainable tourism?” The forty Chinese cultural values are too general so that some of them have little relationship with sustainable tourism, for example Industry (Working hard), Humbleness and Protecting your “face”. On the other hand, some values such as 和 He (Great Harmony) in Confucianism and 无为 Wu Wei (Non-action) in Taoism, which are capable of offering insights for the understanding of sustainable tourism are excluded in the model. The model is not suitable for Study Two, therefore. What is more, the ethical orientation of Confucianism and environmental ethics of Taoism have a close relationship with the concept of sustainable tourism. Traditional Chinese cultural values underpinned by Confucianism and Taoism or, in other words, the Confucian values and Taoist values, are therefore selected for Study Two. Since there is no clear identification or classification of Confucian values and Taoist values, these will be abstracted (Chapter Six and Chapter Seven) and then translated into the context of sustainable tourism (Chapter Nine).

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5.6 Conclusion

Tourism knowledge as a branch of social knowledge is valid but the five forces in tourism knowledge creation, especially ideology, possibly lead to different understandings and interpretations of tourism phenomena. In order to achieve multiple truths about tourism, varies ideologies need to be taken account of. Ideologies are embedded in the societies they arise in and are reflected by those societies’ cultures and values. To achieve a comprehensive understanding of sustainable tourism, therefore, the Chinese cultural values should separately from the dominant Western interpretations. Confucian values and Taoist values are identified as being suitable for Study Two. Chapter Six and Chapter Seven will focus on the definition, and historical development of Confucianism and Taoism, as well as the synthesis of Confucian and Taoist values. Chapter Eight will interrogate the literature on sustainable
tourism to discuss the definition, historical development, clarification and principles of sustainable tourism. Chapter Nine will critique the principles of sustainable tourism in the light of Confucian and Taoist values in order to reinterpret them.
Chapter 6 Confucianism and its Values

6.1 Introduction

This chapter concentrates on Confucianism. Confucianism and those Confucian values materialised in social practices are deemed to be the cornerstone of the value system crystallised in traditional Chinese culture (Pan et al., 1994). One primary issue that needs to be declared from the start is the difficulty in translating and interpreting Confucianism (as with Taoism). This is mainly because these ancient texts and ideas were expressed by monosyllabic words since they were inscribed on bamboo slips (Yao, 2000). Moreover, the language differences between ancient Chinese and modern Chinese cause disagreements, debates and even misunderstandings. The situation becomes worse when translating into English. Yao (2000) indicates the gaps in grammar and the variability of the scope and connotation of a term in a given sentence. What is more, the interchangeable words and variants seem to be an insuperable barrier for non-Chinese researchers on Chinese traditional culture, not to say the cultural and ideological barriers. Therefore, in addition to the English-language literature on Confucianism, this study attaches high importance to classic Confucian works and the interpretations and critiques by the followers of Confucianism. To assist the reader of this thesis, a table has been created which presents the key Confucian terms with regards to Chinese characters, Chinese Pinyin pronunciations, pronunciations Western people are familiar with, and English words with similar meanings (see Appendix).

As explained in Chapter Four, this is the first chapter of the practice of conceptual research. It begins by briefly introducing the content analysis of Confucianism to illustrate how the findings are achieved. Three of the twelve themes of conceptual research that were developed in Chapter Three are covered in this chapter. Firstly, it covers theme one, Defining concepts, to define Confucianism from the perspective of what Confucianism is and what it is not. Then it presents an historical analysis of Confucianism in terms of its origin, development, evolution, rejection and renaissance with the application of theme three Historical analysis of concepts. Confucian values are complex and difficult to measure because to do so requires tracing their origin in classic works, their historical development and their influence (Bell, 2010). Traditional research methods used in philosophy and social science may not be fruitful in studying Confucianism: for example notions like “heaven” (天...
tian in Chinese) and “conscience” (良知 liangzhi in Chinese) cannot be studied by the empirically-minded social sciences (Bell, 2010). Through the interrogation of Confucian classical works and the literature analysing them, both in Chinese and English, eleven key Confucian values are identified and explained using theme nine, Synthesising concepts. Finally a conclusion is drawn, with a summary of Confucianism and an explanation of the relationship between this chapter and the subsequent ones.

6.2 The content analysis of Confucianism

The research process for Study Two has been generally presented in section 4.4, including the review questions, sampling, coding, synthesis and interpretation. In order to make clear how the findings are underpinned, however, it is necessary to explain the process of content analysis in terms of the literature selected and how they are used. As stated in Chapter Four, the books and journals that are relevant to Confucianism (i.e. in respect to its definition, clarification, development and critique) are the source of data (i.e. the literature). The first task is to identify the potential literature using a variety of means (library, Google Scholar, online databases). Purposive sampling was adopted to select the useful literature. Since the literature comprises conceptual research, each study is judged in terms of what conceptual research approaches have been used and whether they represent typical cases or critical cases. The details of the findings of the content analysis are presented in Table 6.1. This indicates the title of the selected literature, the authors, whether they are books or journal articles, the year published, whether they are typical cases or critical cases, the conceptual research approaches used and the main points made in the study. The sample size for Confucianism is 52, including 30 journal articles and 22 books. There are 44 typical cases, five critical cases and three that are both typical cases and critical cases due to the features of different chapters within the books.

The adoption and rejection of the twelve conceptual research approaches for Study Two has been discussed in section 4.4.5. This chapter adopts theme one to clarify the definition of Confucianism; theme three to gain a deeper understanding of Confucianism in terms of its origin, development and evolution; and theme nine to extract the Confucian values. It offers guidance on the process of content analysis. The selected literature is carefully read and re-read, during which notes are taken. The notes refer to all the useful information indicating the definition, the development of Confucianism and the Confucian values. Then the notes are organised, analysed, refined and categorised into sub-units. For example, the notes of the
definition of Confucianism are categorised into what Confucianism is and what Confucianism is not. The definition of Confucianism for this study is proposed based on these notes. It should be noted that, since there is no compelling paraphrase and categorisation of Confucian values, the author attaches great importance to the classical works of Confucianism.
## Table 6.1 Details of content analysis of Confucianism

<table>
<thead>
<tr>
<th>Author(s)</th>
<th>Book/Journal Article</th>
<th>Title</th>
<th>Year</th>
<th>Conceptual Research Approaches Used</th>
<th>Main Points</th>
<th>Typical Case (TC)/Critical Case (CC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arcodia, C.</td>
<td>Journal article</td>
<td>Confucian Values and Their Implications for the Tourism Industry</td>
<td>2003</td>
<td>Four, eight</td>
<td>Identify and classify Confucian values and present their implications for tourism industry especially for marketing</td>
<td>TC</td>
</tr>
<tr>
<td>Bell, A.D. and Chaibong, H.</td>
<td>Book</td>
<td>Confucianism for the Modern World</td>
<td>2003</td>
<td>One, three, five</td>
<td>Discuss the role Confucianism plays in modern world and the debates on this issue</td>
<td>CC</td>
</tr>
<tr>
<td>Bell, D. A.</td>
<td>Book</td>
<td>China's new Confucianism: Politics and everyday life in a changing society</td>
<td>2010</td>
<td>One, three, five, nine</td>
<td>Review the development of Confucianism in the past and discuss its situation in modern times</td>
<td>TC</td>
</tr>
<tr>
<td>Chang, Y. T., Chu, Y. H., &amp; Tsai, F.</td>
<td>Journal article</td>
<td>Confucianism and democratic values in three Chinese societies</td>
<td>2005</td>
<td>Two, eight</td>
<td>Discuss the relationship between Confucianism and democratic values as well as the role it plays in Chinese societies</td>
<td>TC</td>
</tr>
<tr>
<td>Cheng, H., &amp; Schweitzer, J. C.</td>
<td>Journal article</td>
<td>Cultural values reflected in Chinese and US television commercials</td>
<td>1996</td>
<td>Eight, nine</td>
<td>Synthesise Chinese cultural values and how they are reflected in television advertisements</td>
<td>TC</td>
</tr>
<tr>
<td>Confucius</td>
<td>Book (in Chinese)</td>
<td>The Analects of Confucius</td>
<td>Old times</td>
<td>One, two, five, nine</td>
<td>The most important work of Confucianism including the definitions, comparisons and synthesis of the core concepts and values</td>
<td>TC</td>
</tr>
<tr>
<td>Confucius</td>
<td>Book (in Chinese)</td>
<td>The Great Learning</td>
<td>Old times</td>
<td>One, five, eight</td>
<td>Introduce the idea of how to practice self-cultivation, family and governmental management</td>
<td>TC</td>
</tr>
<tr>
<td>Confucius</td>
<td>Book (in Chinese)</td>
<td>The Doctrine of Mean</td>
<td>Old times</td>
<td>One, eight</td>
<td>Introduce the Doctrine of Mean including its meaning and the way to practice</td>
<td>TC</td>
</tr>
<tr>
<td>Confucius</td>
<td>Book (in Chinese)</td>
<td>Spring and Autumn</td>
<td>Old times</td>
<td>three</td>
<td>Reveal the moral values which act as the guideline of human</td>
<td>TC</td>
</tr>
<tr>
<td>Author(s)</td>
<td>Source Type</td>
<td>Title</td>
<td>Year</td>
<td>Pages</td>
<td>Summary</td>
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<tr>
<td>Dirlik, A.</td>
<td>Journal article</td>
<td>Confucius in the Borderlands: Global Capitalism and the Reinvention of Confucianism</td>
<td>1995</td>
<td>Three, eight, ten</td>
<td>Explore how Confucianism is adopted and evolved in the modern times with regards to Capitalism. TC</td>
<td></td>
</tr>
<tr>
<td>Englehart, N.</td>
<td>Journal article</td>
<td>Rights and Culture in the Asian Values Argument: The Rise and fall of Confucian Ethics in Singapore</td>
<td>2000</td>
<td>One, three, eight</td>
<td>Review the rise and fall of Confucian values especially the ethics in Singapore and analyse the reasons of the changes. TC</td>
<td></td>
</tr>
<tr>
<td>Fan, R.</td>
<td>Book</td>
<td>The renaissance of Confucianism in contemporary China</td>
<td>2011</td>
<td>One, three, four</td>
<td>Examine what Confucianism is and its development in the past and modern China. TC</td>
<td></td>
</tr>
<tr>
<td>Fan, Y.</td>
<td>Journal article</td>
<td>A Classification of Chinese Culture</td>
<td>2000</td>
<td>Four, nine</td>
<td>Synthesise and make a classification of Chinese cultural values. TC</td>
<td></td>
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<tr>
<td>Goldin, P. R.</td>
<td>Book</td>
<td>Confucianism</td>
<td>2011</td>
<td>One, three</td>
<td>Review the development of Confucianism and discuss it from both the social and philosophical perspectives. TC</td>
<td></td>
</tr>
<tr>
<td>Han, A. G.</td>
<td>Journal article</td>
<td>Building a harmonious society and achieving individual harmony</td>
<td>2008</td>
<td>One, eight, ten</td>
<td>Analyse one important Confucian value ‘harmony’ and how it works in the modern Chinese society. TC</td>
<td></td>
</tr>
<tr>
<td>Hang, L.</td>
<td>Journal article</td>
<td>Traditional Confucianism and its Contemporary Relevance</td>
<td>2011</td>
<td>Three, seven</td>
<td>Discuss the importance of Confucian values and their revival in the modern time. TC</td>
<td></td>
</tr>
<tr>
<td>Huang, D. D. and Charter, R. A.</td>
<td>Journal article</td>
<td>The origin and formulation of Chinese character: an introduction to Confucianism and its influence on Chinese behaviour patterns</td>
<td>1996</td>
<td>One, three, eight</td>
<td>Review the origin, development and evolvement of Confucianism, and discuss how it works in influencing the behaviours of Chinese people. TC</td>
<td></td>
</tr>
<tr>
<td>Huang, G. H. &amp; Gove, M.</td>
<td>Journal article</td>
<td>Confucianism and Chinese families: Values and practices in education</td>
<td>2012</td>
<td>Eight, nine</td>
<td>Examine the Confucian values and their influence on the Chinese families’ educational practice. TC</td>
<td></td>
</tr>
<tr>
<td>Author(s)</td>
<td>Type</td>
<td>Title</td>
<td>Year</td>
<td>Pages</td>
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<tr>
<td>Huang, G. H. &amp; Gove, M.</td>
<td>Journal article</td>
<td>Confucianism and Chinese families: Values and practices in education</td>
<td>1996</td>
<td>One, eight</td>
<td>Explore Confucianism and its values and the impacts on education of Chinese families</td>
<td>TC</td>
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<tr>
<td>Jensen, L. M.</td>
<td>Book</td>
<td>Manufacturing Confucianism: Chinese Tradition and Universal Civilisation</td>
<td>1997</td>
<td>One, three, eleven</td>
<td>Discuss the problems in translating Confucianism to the Western in terms of inaccuracy in quotation, translation and interpretation</td>
<td>TC/CC</td>
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<tr>
<td>Li, C. and Shi, S.</td>
<td>Journal article (in Chinese)</td>
<td>Rethink Confucian culture</td>
<td>2011</td>
<td>One, three, twelve</td>
<td>Rethink what Confucian culture really is with regards to its development, evolvement and innovation</td>
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<tr>
<td>Lin, C. A.</td>
<td>Journal article</td>
<td>Cultural values reflected in Chinese and American television advertising</td>
<td>2001</td>
<td>Eight, nine</td>
<td>Examine the Chinese cultural values reflected in television advertisements and evaluate the values</td>
<td>TC</td>
</tr>
<tr>
<td>Mencius</td>
<td>Book (in Chinese)</td>
<td>Mencius Old times</td>
<td>1985</td>
<td>Two, three, four</td>
<td>Another representative work of Confucianism including the definitions, comparisons and synthesis of the core concepts and values</td>
<td>TC</td>
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<tr>
<td>Munro, D. J.</td>
<td>Book</td>
<td>Individualism and holism: Studies in Confucian and Taoist values</td>
<td>1985</td>
<td>Two, three, four</td>
<td>Explore the Confucian and Taoist values historically focusing on individualism and holism</td>
<td>TC</td>
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<tr>
<td>Qu, A.</td>
<td>Journal article (in Chinese)</td>
<td>Traditional Chinese environmental ethics and sustainable development</td>
<td>2008</td>
<td>Three, eight, ten</td>
<td>Explore the relationship between traditional Chinese environmental ethics and sustainable tourism</td>
<td>TC</td>
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<tr>
<td>Rarick, C. A.</td>
<td>Journal article</td>
<td>Confucius on management: Understanding Chinese cultural values and managerial practices</td>
<td>2007</td>
<td>Eight, ten</td>
<td>Examine the Confucian Chinese cultural values and its impacts on the beliefs and practice of Chinese management</td>
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<tr>
<td>Author(s)</td>
<td>Type of Publication</td>
<td>Title of the Work</td>
<td>Year</td>
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<td>Ren, X.</td>
<td>Journal article (in Chinese)</td>
<td>The implications of Confucianism for modern ecological problems</td>
<td>2002</td>
<td>Two, ten</td>
<td>Investigate the ethics and values of Confucianism and its contribution to solve modern ecological problems</td>
<td></td>
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<tr>
<td>Robertson, C. J. and Hoffman, J. J.</td>
<td>Journal article</td>
<td>How different are we? An investigation of Confucian values in the United States</td>
<td>2000</td>
<td>Two, four</td>
<td>Compare Confucian values with the Western values with regards to their impacts on beliefs and behaviours</td>
<td></td>
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<tr>
<td>Shun, K. L. and Wong, D. B.</td>
<td>Book</td>
<td>Confucian ethics: A comparative study of self, autonomy, and community</td>
<td>2004</td>
<td>One, two, eight</td>
<td>Investigate Confucian ethics with regards to the relationship with self, autonomy, and community</td>
<td></td>
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<tr>
<td>Smith, D. H.</td>
<td>Book</td>
<td>Confucius</td>
<td>1973</td>
<td>Three, nine</td>
<td>Introduce the life and thoughts of Confucius</td>
<td></td>
</tr>
<tr>
<td>Tamai, K., &amp; Lee, J.</td>
<td>Journal article</td>
<td>Confucianism as cultural constraint: A comparison of Confucian values of Japanese and Korean students</td>
<td>2002</td>
<td>Two, eight</td>
<td>Examine the differences of Confucian values between different countries and their impacts on the beliefs and behaviours</td>
<td></td>
</tr>
<tr>
<td>Tu, W.</td>
<td>Book</td>
<td>Confucianism in an historical perspective</td>
<td>1989</td>
<td>One, three</td>
<td>Historical analysis of Confucianism in terms of its origin, development, evolvement and arguments</td>
<td></td>
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<tr>
<td>Tu, W.</td>
<td>Book</td>
<td>Traditions in East Asian Modernity: Moral Education and Economic Culture</td>
<td>1996</td>
<td>Three, eight</td>
<td>Explore the role Confucianism plays in East Asian in the process of modernity with regards to moral education and economic culture</td>
<td></td>
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<tr>
<td>Author(s)</td>
<td>Source Type</td>
<td>Title</td>
<td>Year</td>
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<tr>
<td>Wang, J., Wang, G. G., Ruona, W. E., and Rojewski, J. W.</td>
<td>Journal article</td>
<td>Confucian values and the implications for international HRD</td>
<td>2005</td>
<td>Four, eight</td>
<td>Discuss the Confucian values and their impacts as well as the implications for human resource development</td>
<td></td>
</tr>
<tr>
<td>Weber, M.</td>
<td>Book</td>
<td>The Religion of China, Confucianism and Taoism</td>
<td>1951</td>
<td>One, two, three</td>
<td>Introduce Confucianism and Taoism and review their development historically</td>
<td></td>
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<tr>
<td>Xi, Y. and Lu, X.</td>
<td>Journal article</td>
<td>Harmony Concept and Harmony Comparison</td>
<td>1997</td>
<td>One, three, five</td>
<td>Explore the concept of ‘harmony’ in Confucianism and its applications in modern society</td>
<td></td>
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<tr>
<td>Xiao, J. and Li, J.</td>
<td>Book</td>
<td>An outline history of Chinese philosophy</td>
<td>2008</td>
<td>One, two, three, five</td>
<td>Review the historical development of Chinese philosophy in terms of man’s cognition of nature, society and ideological trends</td>
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<tr>
<td>Xiao, S. and Yang, D.</td>
<td>Journal article</td>
<td>The measurement of traditional Chinese culture: theoretic proposal</td>
<td>2002</td>
<td>Four, eight</td>
<td>Investigate traditional Chinese culture and propose a conceptual framework of its measurement</td>
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<tr>
<td>Yang, C. K.</td>
<td>Book</td>
<td>Religion in Chinese society: A study of contemporary social functions of religion and some of their historical factors</td>
<td>1961</td>
<td>Two, three, five</td>
<td>Historically review the Chinese religions including Confucianism, Taoism and Chinese Buddhism as well as their social functions</td>
<td></td>
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<tr>
<td>Yang, L. and Lai, B.</td>
<td>Journal article (in Chinese)</td>
<td>Confucianism and environmental ethics in ecotourism</td>
<td>2005</td>
<td>Two, ten</td>
<td>Explore the relationship between Confucianism and environmental ethics with regards to the values of Humanity and Propriety</td>
<td></td>
</tr>
<tr>
<td>Yao, X.</td>
<td>Journal article</td>
<td>Who is a Confucian Today? A Critical Reflection on the Issues</td>
<td>2001</td>
<td>One, three, ten</td>
<td>Discuss the definition of Confucianism and Confucian values and the challenges it come across in its modern transformation</td>
<td></td>
</tr>
<tr>
<td>Author</td>
<td>Type</td>
<td>Title</td>
<td>Year</td>
<td>Pages</td>
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<tr>
<td>Yao, X.</td>
<td>Book</td>
<td>An introduction to Confucianism</td>
<td>2000</td>
<td>One, two, three</td>
<td>Introduce Confucianism in terms of its background, development, evolvement, debates in detail</td>
<td>TC</td>
</tr>
<tr>
<td>Yao, X.</td>
<td>Journal article</td>
<td>Confucianism and its modern values: Confucian moral, educational and spiritual heritages</td>
<td>1999</td>
<td>One, four, nine</td>
<td>Discuss the Confucian values relating to moral, life, responsibilities, future, education and how they work in the modern times</td>
<td>TC</td>
</tr>
<tr>
<td>Yin, L. C.</td>
<td>Journal article</td>
<td>Do traditional values still exist in modern Chinese societies?</td>
<td>2003</td>
<td>One, ten</td>
<td>Identify traditional Chinese cultural values and evaluate them in modern Chinese society</td>
<td>CC</td>
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<tr>
<td>Yu, T.</td>
<td>Journal article</td>
<td>The revival of Confucianism in Chinese schools: a historical-political review</td>
<td>2008</td>
<td>One, three</td>
<td>Examine the revival of Confucianism in Chinese society and education with regards to the social and political background</td>
<td>TC</td>
</tr>
<tr>
<td>Zhang, M.</td>
<td>Journal article (in Chinese)</td>
<td>Illustration of consumer behaviour in terms of Confucian cultural values</td>
<td>2005</td>
<td>One, four, eight</td>
<td>Explore the relationship between consumer behaviour and Confucian values referring to definition, measurement and suggestions for marketing</td>
<td>TC</td>
</tr>
<tr>
<td>Zhang, Q.</td>
<td>Book</td>
<td>Traditional Chinese Culture</td>
<td>2007</td>
<td>One, two, three</td>
<td>A detail introduction of traditional Chinese culture including the philosophy, art, religion and so on.</td>
<td>TC</td>
</tr>
<tr>
<td>Zhang, X.</td>
<td>Journal article (in Chinese)</td>
<td>Spirit and cultural values of Confucianism</td>
<td>1998</td>
<td>One, four, nine</td>
<td>Discuss the spirit and cultural values of Confucianism with regards to ethics, self-cultivation and great harmony</td>
<td>TC</td>
</tr>
<tr>
<td>Zhou, WW.</td>
<td>Book (in Chinese)</td>
<td>I-Ching/Book of Changes</td>
<td>Old times</td>
<td>One, five, eight</td>
<td>The most important work of Chinese philosophy which act as the guideline of human thoughts and behaviours</td>
<td>TC</td>
</tr>
<tr>
<td>Zhu, Z.</td>
<td>Journal article</td>
<td>Confucianism in action: recent developments in oriental systems methodology</td>
<td>1998</td>
<td>Three, eight</td>
<td>Review the development of Confucianism in recent years and how it is practised</td>
<td>TC</td>
</tr>
</tbody>
</table>
6.3 Defining Confucianism (theme one Defining concepts)

According to theme one, Defining concepts, conceptual research critiques, evaluates or synthesises different definitions or understandings of a concept(s). This section discusses what Confucianism is and what Confucianism is not by analysing the definitions of Confucianism in order to clarify one which is suitable for this study.

6.3.1 What Confucianism is

The question of what Confucianism is one of the most popular debates in the history of the study of Confucianism. Generally speaking, Confucianism is the oldest and most revered philosophy of China (Goldin, 2011). Yan and Bramwell (2008) state that Confucianism is a set of philosophical beliefs and cultural values developed from the teachings of Confucius and his followers that have influenced the Chinese people significantly, both now and throughout history. It is sometimes referred to as Confucian culture (Bell and Chaibong, 2003). Smith (1973) regards Confucianism as an ethical-political system, a pervasive moral and spiritual teaching working through education and example. Tu (1989) deems it to be a form of philosophical anthropology that is laden with profound ethical-religious implications.

The simple categorisation of Confucianism as moral maxims by Western people can hardly explain the depth of the influence and prestige of Confucianism. Rather it is better to understand the Confucian ideas as a system (Yao, 2000). Confucianism aims at harmony through an ethical approach based on personal cultivation. This harmony is not limited within social or political order, however, but is a much broader one that includes human inter-relationships and the human-nature relationship.

6.3.2 What Confucianism is not

Although there are internal disagreements and debates in Confucianism, Confucius’s ideas are inherited and developed sincerely by his followers (Tu, 1996). Confucianism has been misinterpreted and misunderstood by people who are not Confucian scholars, however. What is deemed as Confucianism are in fact not Confucian ideas. Confucianism has sometimes been distorted for political or other purposes (Zhang, 2007). Feminist writers tend to attribute everything infringing women’s rights in China to Confucianism, such as foot binding. The original purpose of foot binding was to make women more attractive, which was then highly prized by women themselves (Goldin, 2011). But it does not mean foot binding
was Confucian. The practice of becoming more attractive for marriage was never a concern of Confucianism.

Another case is sociologists and social historians who often refer to the term “the Confucian family” which indicates that Confucianism prescribed a specific family structure. While Confucianism attaches importance to how people should behave within a family, however, it never proposes the ideal family structure (Goldin, 2011). Moreover, prescriptions like that forbidding women from remarrying were only a moral requirement of one Confucian faction 程朱理学 “Cheng Zhu Li Xue” (the so called ‘neo-Confucianism’) established in the Song dynasty. This cannot be interpreted as a widely accepted moral regulation of Confucianism. The critique of Confucianism should clarify this. In fact, Confucius did not affirm any universal principle but supported the contention that rightness and wrongness must be judged anew in every situation. In other words, the term “Confucianism” has been profligately deployed. For example, some scholars have loosely labelled any ethical norms of Chinese origin “Confucianism” (Rozman, 1991).

There is also a debate as to whether Confucianism is a religion or not. Weber (1951) in his book The religion of China: Confucianism and Taoism categorised Confucianism as a religion. Tu (1989) asserts that Confucianism is useful for understanding human religiousness in a global context. Although Confucianism prescribes ritual, it is not supposed to be described as worship in a formal sense (Fingarette, 1972). “To take what is due to the people as one’s duty, and to revere the ghosts and spirits, but keep them at a distance (Analects of Confucius, Chapter 6)” is considered as wisdom by Confucius. Confucius encourages people to do what they think is right rather than what they think the ghosts and spirits want them to do. As stated by Smith (1973), Confucius was neither the founder of a religion nor a religious genius.

The rituals advocated in Confucianism do not make it a religion. Confucianism is interested in the essential human relationships rather than in the world of spirits or in immortality (Yao, 2000). Many important questions that are regarded as of first importance have been of little concern in Confucianism. Confucianism lacks many elements vital to an institutionalised religion such as a specialised priesthood, or church organisation with rules and conditions of membership (Smith, 1973). Debate also focuses on whether it is possible to
have a satisfactory ethical code without a religion (Smith, 1973). Confucianism has never
linked ethics to religion as Christianity or Islam do, but is purely concerned with humanity
and human relationships without the philosophy of nature or of the cosmos. Confucianism is
therefore not a religion but a system of ethics or cultural values (Yan and Bramwell, 2008).

6.3.3 Definition of Confucianism

Goldin (2011) claims that it is crucial to arrive at a workable definition of Confucianism
since its boundaries have been drawn both too broadly and too narrowly in the past.
Confucianism can be understood roughly as largely "the stream of individuals, claiming
Confucius to be the Greatest Master" while it also means "the social group following moral,
political, and philosophical doctrine of what was considered, at a given time, as the orthodox
understanding of Confucius" (Fingarette, 1972, p.7). What is called Confucianism itself
contained enormous complexity historically (Dirlik, 1995). The concept of Confucianism was
created by European Jesuits as a translation of the Chinese term "儒家 Ru Jia" to portray
Chinese society to Europeans (Jensen, 1997). The term “儒 ru” has been translated as
“Confucian” and “家 jia” as “school”. The notion was then borrowed back by Chinese people
to introduce and spread their ideas. It is undeniable that “儒家 Ru Jia” is the term Chinese
people use to identify Confucius and his intellectual adherents (Glodin, 2011). In this
meaning, Confucianism can be defined as “any system of thinking that has, at its foundations,
the works that are regarded as the ‘Confucian classics’, which was the corpus used in the
imperial examination system” (Jensen, 1997, p.3). It has to be addressed that the term
Confucianism is often used loosely by Western people as synonymous with Chinese culture
(Rozman, 1991). This is an exaggeration of the boundary and extent of Confucianism,
overlooking its rivals like Taoism and Buddhism.

It is important to explain the term of Confucianism that is used in this specific research,
differentiating the perspectives that are focused on (Ornatowski, 1996). Glodin (2011, p.1)
defines Confucianism as referring to “the philosophy of Confucius, his disciples, and the
numerous later thinkers who regarded themselves as followers of his tradition”. This
definition is restrictive enough to distinguish Confucianism from the many other philosophies
and worldviews that flourished in traditional China, while still being able to take the diversity
of Confucianism into account (i.e., its internal disagreements and debates). This kind of
definition is also debatable, however, due to the variability of Confucianism in history. For
example, although concepts such as the Great Learning (大学 Da Xue in Chinese) and the Doctrine of the Mean (中庸 Zhong Yong/Chung-yung in Chinese) are excluded in Neo-Confucianism due to the similarity of these themes to Taoism and Buddhism (Jensen, 1997), these classic works are Confucian, irrespective of their relevance to other ideologies. In this study, therefore, Confucianism refers to the ideas, thought and values reflected in the classic works by Confucius and his followers as well as the understandings and interpretations of these works over the course of history, excluding exaggerations and biased interpretations and critiques of Confucian ideas and values.

6.4 Historical analysis of Confucianism (theme three Historical analysis of concepts)

According to theme three identified in Chapter 3, Historical analysis of concepts, conceptual research reviews the origins, development or evolution of a concept(s). To understand Confucianism as a Chinese traditional system of values, it is necessary to undertake an historical analysis of how it came into being and how it was transformed. Yin (2003) claims that it is important to identify the conflict and exchange between Confucianism and the extant value system. There are different ways to perform an historical analysis of Confucianism, the most popular of which is to divide it into periods in tandem with Chinese history: in other words, to make Confucianism part of a more complicated history of political, social, economic, religious and cultural life. The second approach was proposed by Fung (1953) who divided the history of Confucianism into two ages, the creative (the initial formulation of the early teaching into a cohesive tradition from Confucius to the Han dynasty) and the interpretative (the expansion of the tradition in line with social and political developments from the Han dynasty to the Qing dynasty).

The third way is to divide Confucianism into five stages: its formulation, its interaction with other schools such as Legalism and Moism, its transformation as a result of the challenges of Buddhism and Taoism, its introduction to other East Asian countries, and its renovation, during which it was further transformed and developed in the light of other world philosophies. In the context of this study, however, it is impractical and unnecessary to undertake a detailed historical analysis of each Chinese dynasty because it is not a study of Confucianism itself but an exercise to extract Confucian values. The historical analysis of
Confucianism is therefore approached with respect to its origin, development and evolution, and subsequent rejection and renaissance.

6.4.1 The origin of Confucianism

There is no doubt that Confucianism originated from Confucius who was born in 551 BC. It is doubtful, however, whether Confucius left behind any writings of his own or whether all the ideas and opinions attributed to him were gleaned from his disciples and followers (Glodin, 2011). Indeed, the earliest biographical sketch of Confucius was in *Historical Records* (史记 *Shi Ji* in Chinese) by Sima Qian, who lived about three hundred years after Confucius (Yao, 2000). These uncertainties are of less significance for this enquiry, however, because it is not the aim of this section to attempt a biography of Confucius, but to explore the origin of Confucianism and its initial situation. The assessment of the early stages of the development of Confucianism is challenging, however, since much of the original literature was condemned to be burnt before the Han dynasty. It is necessary to review the cultural background of the Zhou dynasty (1122-221 BC) that existed down to the time of Confucius in order to understand the origin of Confucianism. People in the Zhou dynasty recognised an obligation to observe an elaborate code of ritual and ceremonial (Smith, 1973). This is the source of propriety (礼 *li* in Chinese), moral requirements and great harmony (和 *he* in Chinese) theory of Confucianism.

Disappointed with contemporary political achievements, Confucius founded a school and devoted himself to teaching. Seventy-two disciples of Confucius were honoured as people of virtue by the people afterwards (Zhang, 2007). After the death of Confucius, his name and fame began to be spread (Bell and Chaibong, 2003). Mencius (孟子 *Mengzi* in Chinese) (390-305 BC), who was born a century after the death of Confucius, is considered to be the second greatest master of Confucianism. He took up the essential virtues of humanity (仁 *ren*), righteousness/justice (义 *yi*), propriety (礼 *li*), wisdom (智 *zhi*) and trustworthiness (信 *xin*), and claimed that these virtues are common to all men (Zhang, 2007). In the *Works of Mencius*, numerous examples and illustrations revealed the belief that a man ought to be in himself is *ren*, and act towards others in all human relationships with *yi* (Smith, 1973). Another outstanding Confucian master in the origin stage of Confucianism was Hsun-tzu (荀子 *Xunzi* in Chinese). While Mencius focused mainly on *ren* and *yi*, Hsun-tzu emphasised external authority and exalted *li*, or the rules of proper conduct, as the basis of
morality. During the origin stage, Confucianism gradually took shape in terms of theory, integrity and systematisation.

6.4.2 The development and evolution of Confucianism

Tu (2000) divides Confucian history into three stages: Classical Confucianism, Neo-Confucianism, and twentieth-century New Confucianism. A milestone in the development of Confucianism was its acceptance as a national orthodox doctrine during the Han dynasty (221 BC-AD 6). The emperor Han Wu (140-87 BC) highly praised Confucianism, establishing it as the official ideology for political government, and allowing it to triumph over its rival ideologies (Smith, 1973).

Neo-Confucianism was established in the Song dynasty (AD 960-1279) as an unassailable orthodoxy governing China irrespective of the preferences of individual emperors (Smith, 1973). The founder of the Song dynasty, Chao Kuang-yin (AD 960), recruited Confucian scholars to take the highest offices of state, which resulted in a great expansion in the cultural and intellectual activity of Confucianism. Its acceptance as the orthodox way of life among scholars and officials did not mean that Confucianism went unchallenged. Its rival ideologies, such as Taoism and Buddhism, also exercised great influence in the state (especially in the Tang dynasty). In order to improve its theories and minimise these challenges, therefore, extraneous sources were absorbed by Confucian followers (Zhang, 2007). For example, the philosophical ideas and interpretations of man’s nature and destiny expounded in Buddhism forced Confucian scholars to reinterpret their original ideas so as to provide answers to those questions (Smith, 1973). Apart from the strict code of morality, Neo-Confucianism succeeded to oppose the metaphysical speculations of the Buddhism and Taoism by turning to the Confucian classics, especially the Book of Changes (易经 Yi Jing/I-Ching). Human nature and cosmic order, the way to achieve human perfection and an ideal human society, the principle of government by moral example, and the cardinal importance of education, are the four headings summed up by Neo-Confucian scholars (Huang, 2007).
6.4.3 The rejection and renaissance of Confucianism in the modern times

Confucianism retained a preeminent position up until the advent of modernity in the latter half of the nineteenth century (Bell and Chaibong, 2003). The most serious crisis to face Confucianism was the May Fourth Movement in the early 1920s, during which Confucianism was criticised as being responsible for the most basic political and social problems of Chinese society (Dirlik, 1995). Another calamity for Confucianism was during the period 1966 to 1976, when Chairman Mao launched the Cultural Revolution with the purpose of reinvigorating the socialist revolution (Sofield and Li, 2011). The combination of a Eurocentric modernisationism, and the radical Marxist and liberal intellectuals in China, played a major role in discrediting Confucianism (Yan and Bramwell, 2008). It was not the content of Confucianism that changed overnight but the evaluation of that content with respect to the question of modernity (Dirlik, 1995).

As Smith (1973) indicated, it is foolish to criticise Confucianism for the absence of egalitarian, socialistic and democratic ideas that only emerged much later. In order to survive in the modern era, Confucianism was reinterpreted in the 19302 as an ethicospiritual system of values which could accommodate science and democracy; this was called New Confucianism (Dirlik, 1995). After the Open Door policy was launched in 1978, China’s government began to re-evaluate traditional cultural values. In this context, more importance has been attached to Confucianism by Chinese people in recent years, in what has been considered to be a Confucian renaissance (Dirlik, 1995; Tu, 1996). The government of China now promotes Confucian values as core Chinese values and has proposed the concepts of “Harmonious Society” and “Harmonious World” based on the great harmony theory of Confucianism (Han, 2008).

6.5 Key Confucian values (theme nine Synthesising concepts)

In general, the communication style exhibited within East Asian culture is thought to be infused with Confucian humanistic concerns and moral principles. Confucian values have played a significant role not only in the great achievements of ancient Chinese civilisation, but also in modern times. Han (2008) analyses one important Confucian value, ‘harmony’, and the role it plays in building a harmonious society in modern China. Rarick (2007) examines the Confucian Chinese cultural values and its impacts on the beliefs and practice of
Chinese management. The study of Confucian values can also contribute to the tourism industry; for example Arcodia (2003) investigates Confucian values and their implications for the tourism industry, especially for marketing.

There are many Confucian values or principles referring to almost all aspects of human life. Yin (2003) indicates that the study of Confucian values should not only centre at the “philosophical” level but also the “psychological” level. There is no consensus on the categorisation of Confucian values. Roetz (1993) categorises the values of filial piety (xiao), propriety (li), justice or righteousness (yi) and harmony (he) as conventional values and humanity (ren) as a post-conventional value. This category is criticised as failing to realise that post-conventional values, such as humanity, cannot be separate from conventional ones since the latter are the means by which the former are fulfilled. It has also been criticised for failing to appreciate the importance of reinforcing the conventional values so as to encourage individuals to a pattern of moral conduct rather than introducing a new moral paradigm (Cheng, 1997). Compared to commonly discussed values like “family solidarity” and “face”, the key Confucian values of propriety and righteousness have rarely been investigated (Cheng, 1997). Sometimes what are called Confucian values are only the biased understandings of Western scholars that either do not reflect the essence of Confucianism (Robertson and Hoffman, 2000) or loosely equate some general Chinese cultural characteristics to Confucian values (Wang, Wang, Ruona and Rojewski, 2005) such as Face (Mianzi 面子). It is crucial, therefore, to indicate the specific Confucian values used in different pieces of research.

Theme nine of the conceptual research approaches, Synthesising concepts, integrates or synthesises existing knowledge (the classic Confucian works and the interpretations of later scholars). In fact, Confucian values are used differently according to different research aims, for example four values (respect for learning, loyalty, filial piety and harmony) are identified in Ornatowski’s (1996) paper, which attempts to analyse the relationship between Confucian values and modern economic development. With respect to the purpose for which Confucianism is studied in this research—i.e. to analyse the possible relationship between Confucianism and sustainable tourism—eleven key Confucianism values are abstracted. It should be noted that some values that have little things to do with sustainable tourism, like political views, are excluded from this analysis. Confucianism advocates nine core values: 仁
ren (Humanity or Benevolence), 义 yi (Righteousness or Justice), 礼 li (Propriety), 智 zhi (Knowledge or Wisdom) and 信 xin (Trustworthiness), 恕 shu (Empathy), 忠 zhong (Loyalty), 孝 xiao (Filial Piety) and 长远观 changyuan guan (Long-term Orientation). These nine fundamental values are realised by the means of the tenth value 修己 xiuj (Self-cultivation). If all these values are present, the eleventh one, which is the ultimate value, 和 he (Great Harmony), can be achieved. It has to be claimed that these values are not independent from each other but are interrelated and interweave with each other. i.e. the interpretation and explanation of one value may have an effect on the others.

6.5.1 仁 Ren (Humanity or Benevolence)

Ren is deemed to be the highest attainable moral standard of external roles or conduct depending on the aspiration of the internal spirit (Huang and Charter, 1996). It is interpreted as the source of all the virtues that are embodied in the other values (Wang et al., 2005). There are numerous and divergent translations of ren, such as humanity, benevolence, humaneness, goodwill, nobility and human-heartedness. This diversity may due to the fact that Confucius never defined ren explicitly but talked about it so as it to spur his students and followers to come to their own understanding of it (Goldin, 2011). Another reason why Confucius did not really explain ren directly may be ascribed to the fact that such a big epistemological issue as the nature of life is too difficult to define.

The concept of ren originated before the time of Confucius with the meaning of “affection among people”. It was Confucius who developed ren into the highest attainable moral standard. In the Analects of Confucius, he is represented as using the term one hundred and nine times, and a study of these usages demonstrates what he meant by it. In the book of The Doctrine of the Mean (Chung Yong), Confucius indicates that “Ren is the humanity”. Ren is the nature of human beings which differs humans from other animals. Referring to the relationship between humans and nature, humans are a part of nature rather than independent from it. The difference between humans and other animals, it is argued, is the consciousness of ethics and the pursuit of virtue. Confucius gives different explanations of ren when asked by different students. Confucius explains ren as “humaneness (love towards others)” for his student Fanci (The Analects of Confucius, Chapter 12).
The first and foremost thing in the practice of ren is love towards others. The basic requirement for ren is to love and treat others with humaneness. This love is broad and altruistic. People who only love and take care of themselves are acting inconsistently with the rule of ren. This love towards others is made evident by the virtues of zhong (loyalty) and shu (empathy). Perhaps the most explicit explanation of ren is given by Confucius when he responded to his student Yanyuan.

Yanyuan asks: “what is ren”? Confucius answers: “ren is to restrain oneself and make sure all one’s words and behaviours are in accord with the requirements of li (Propriety). When all his words and behaviours are in accord with the requirements of li, then ren is achieved. To achieve ren is all depending on oneself rather than others.” Yanyuan says: “Please give some details”. Confucius says: “do not look at the things inconsistent with li, do not listen to the things inconsistent with li, do not say the things inconsistent with li, do not do the things inconsistent with li”.

(The Analects of Confucius, Chapter 12)

Here Confucius clarifies the metaphysical value of ren through its relationship with another value li (Propriety), that of do not look, listen, say and do things inconsistent with the requirements of li. People without ren cannot apply and fulfil the requirements of li. Li means nothing for the people without ren (The Analects of Confucius, Chapter 2). The specific forms of li are determined by with the rule of ren. If we consider ren as the nature of human beings, li is then the means to achieve this nature in social life. Ren is the underpinning of li and in accord with li is the requirement of ren.

Confucius specifies ren through the five sub-virtues of gong (respect), kuan (tolerance), xin (trustworthiness), min (diligence), and hui (share) when he explains ren to his student Zizhang. Here Confucius refers to the rules and application of ren, rather than the nature of ren. The five virtues are easy to understand but difficult to apply.

Zizhang asks: “what is ren”? Confucius answers: “People who practise the five virtues can be considered as ren.” “What are they?” “They are gong, kuan, xin, min and hui. One won’t be subject insult if he always shows respect to others, one who is tolerant to others will gain the support from others, one with trustworthiness will be assigned to a position by employers, one who is diligent will be productive and effective in working, one who shares interests with others will be able to order others.”

(The Analects of Confucius, Chapter 17)
Confucius also teaches his student Zigong that “People with ren are the ones who not only seek for self-accomplishment but also help others to do so. This empathy is one way to practise ren” (The Analects of Confucius, Chapter 6). Confucius also discusses ren in relation to other issues, such as “people with ren gain through hard working” (The Analects of Confucius, Chapter 6), which obviously stresses the importance of hard work, and “only the people with ren can like and dislike others correctly”, “ren can be reflected by one’s misconducts” (The Analects of Confucius, Chapter 6) which suggest the need to avoid prejudice and bias when judging people.

Since ren is so important, what are the methods suggested by Confucius for its attainment? Ren can only be increased by the moral effort related to self-cultivation, love towards others, and the continued practice of goodness. Although ren is the leading ethical Confucian value, the sum of all virtues, in the formation of the character of the ideal “junzi (man of moral integrity)”, it stands with many other essential qualities that Confucius stressed again and again. Yet it is only by the constant practise of ren that one learns to appreciate the ideal of perfect goodness and the difficulty of its attainment. Confucius knew full well that virtue does not grow in a vacuum, but only by benevolent conduct in the practical affairs of everyday life. The perfection of personality lies in acting always with reverence and respect, displaying in all the varied relationships of life courtesy, liberality, faithfulness, diligence and kindness.

Ren refers to different things at different times, and when reflecting different circumstances and objects. Four aspects should be taken into account in understanding ren. First, the attitude towards ren. According to Confucius, everyone should have the willingness to pursue ren. The root of ren depends on how people behave themselves rather than the force of others. Only when one pursues ren consciously can ren be achieved. Second, the inner value of ren. Confucianism is an ethical system of how to deal with the relationships between self and others, as well as between people and society. Confucius is concerned with the question of how to develop the ideal personality in social life. One important reflection of the inner value of ren is to seek for self-accomplishment but also to help others to do so. Third, the way in which ren is manifested. The first and foremost thing in the practice of ren is love towards others. Another manifestation is the emphasis on humans and on ideas and behaviour. Fourth, the practical value of ren. Ren is not just a metaphysical concept but practical. There are lots of discussions that focus on the practice or, in other words, how to
achieve ren, and Confucianism attaches much importance to this practice, and even encourages followers to “sacrifice one's life to preserve ren” (The Analects of Confucius, Chapter 15).

6.5.2 义 Yi (Righteousness or Justice)

Yi (Righteousness or Justice) is another important value that is encouraged in Confucianism. What had Confucius himself to say concerning yi, and what was the criterion for deciding what yi is? An investigation of its usages in the Analects of Confucius reveals that yi is thought of as what is fitting, right, seemly. A thin definition depicts yi as "what is appropriate" (Doctrine of the Gooden Mean, Chapter 20). Philosophers differ over what is appropriate, and how to determine it, however (Shun and Wong, 2004). Confucius does not try to give an abstract definition of yi. Men learn to distinguish between what is righteous or unrighteous since this is a quality displayed in the character and conduct of the “Junzi (Gentleman, man of moral integrity)”. As Confucius claims, “for Junzi, there is nothing in the world that has to be done like this or not like this as long as it accords with yi” (The Analects of Confucius, Chapter 4). Confucius insists that a love for learning from the righteous way of the ancient sage is fundamental, for without such learning all the excellent virtues degenerate into great evils. This learning of yi is valuable when concerning the virtue of courage, as he explains “Junzi considers yi as the most important thing. A gentleman who possesses courage but lacks righteousness will cause disturbances while a common man will become a thief” (The Analects of Confucius, Chapter 17).

The philosopher Mo-tzu deems yi to be a cardinal virtue, claiming that Heaven is righteous and human beings should follow the Way of Heaven by seeking themselves to be righteous. Mencius claims that yi is a principle which belongs to man’s nature. It is something that a gentleman cherishes and holds on to even in preference to life itself. Special importance is attached to yi in Confucianism as Mencius’s famous statement says “Life is what I want, Justice is also what I want; when they are contradictory, I will sacrifice my life for justice”. That “Justice is superior to life” is considered to be one of the lofty ethical benchmarks for Junzi. When it comes to the relationship between 义 yi (Justice) and 利 li (Benefit), Confucianism offers an explicit interpretation. For example, “Although wealth and benefit are what a man wants, they should not be accepted unless obtained in a just way” (The Analects of Confucius, Chapter 4); “Junzi (Gentleman, man of moral integrity) values Justice while villains (a man of base character) values Benefit” (The Analects of Confucius, Chapter
This does not mean that human beings should not seek for profits but that they should do so in a way that is consistent with justice. It can be further described, as Confucius says, “Consider Justice in front of Benefit”. A man should always bear in mind Justice when he comes across Benefit and through this will knows how to behave ethically. In addition, Hsun Tzu proposed “restrict Profit by Justice”. He claimed that human beings’ desire for Profit is eager and will lead to unethical behaviours without restriction. Justice is an effective tool for the restriction of the greedy for Profit.

6.5.3 礼 Li (Propriety)

The concept of 礼 li (Propriety) refers to a wide range of meanings including rules of proper conduct, good manners, etiquette, courtesy, ceremony, rites and rituals (Cheng, 1997). Originally the term was used for “religious rites”, but the concept was then broadened to include all the socially accepted regulations of proper conduct and good manners.

Li is mostly discussed together with ren in Confucianism because they are interrelated and cannot be understood independently from one another. The relationship between li and ren has been discussed in the above section. People without ren cannot fulfil the requirements of li. And li means nothing for the people without ren. Ren is the underpinning of li and in accord with li is the requirement of ren. When ren is established by li it provides the appropriate patterns of conduct to govern socially acceptable human relationships. The appropriate patterns refer to what people should or should not look at, listen, say and do. Li defines the roles people play in families (such as to be a father), in schools (such as to be a student), in companies (such as to be an employee) and so on. The most famous description of li is “monarch acts like monarch, minister acts like minster; father acts like father, son acts like son” (The Analects of Confucius, Chapter 14).

Apart from ren, li is also associated with another value that of he (Great Harmony). The ideal state of application of li is the achievement of he, in other words, a harmonious social relationship (The Analects of Confucius, Chapter 1). On the one hand, he is the aim of the application of li. On the other hand, it is not acceptable to take the achievement of harmony as the only goal without being restrained by li. Confucianism encourages a harmonious society with li as the rule of proper conducts and good manners.
6.5.4 智 Zhi (Knowledge or Wisdom)

Zhi consists of two aspects of meaning in Confucianism, which are knowledge and wisdom. Confucianism considers the people who have knowledge as wise, as is reflected in the Chinese character 知 (Knowledge), which acts as a component of 智 (Wisdom). Confucius lays great emphasis on studying and exploring for knowledge as he claims “There is no regret to die in the evening if one knows the truth in the morning” (The Analects of Confucius, Chapter 4). This demonstrates how he values knowledge and the willingness to learn. Confucius states that he is not someone born with knowledge but accumulates knowledge by hard learning (The Analects of Confucius, Chapter 7). He also encourages learning from the people around as he believes that “There must be one of the three people around you who can be your teacher in certain ways. Pick out the merits to learn and the flaws to avoid.” (The Analects of Confucius, Chapter 7)

Confucius also attaches importance to the method of study, as he stated “It is useless to learn without thinking; it is dangerous to think without learning” (The Analects of Confucius, Chapter 2). This is a discussion of the relationship between thinking and learning, and here Confucius is emphasising the utter futility of learning by rote or memorising lessons: the accumulated wisdom of the past has to involve critical and reflexive thinking in order to discover its true meaning and how to apply it. Knowledge results from thought which systematises and harmonises the facts and experiences which the process of learning brings to one’s notice (The Analects of Confucius, Chapter 2). Since the aim of learning is the attainment of knowledge, people should make clear what they know and do not know. Confucius also believes that there are realities beyond the scope of human enquiry. It is certain that there were topics he was reluctant to discuss because he knew that he had no certain knowledge concerning them.

On the other hand, zhi (Wisdom) is discussed in relation to governing and management in Confucianism. When asked by the student Fanci about what Wisdom is, Confucius answered: “Know people. Make the people of integrity as superiors so that the subordinates can learn from them” (The Analects of Confucius, Chapter 12). The managers should know their followers in terms of abilities and personalities, and assign the ones with good personalities to higher positions to act as examples for others. A government or organisation is established by zhi (Wisdom), it cannot be maintained without the application of ren and li,
and a serious attitude towards the management (*The Analects of Confucius*, Chapter 15). The *zhì* advocated in Confucianism is therefore *Wisdom* in line with the rules of *ren* and *li*.

### 6.5.5 信 Xin (Trustworthiness)

*Xin* (Trustworthiness) is another important value of the ethical system of Confucianism and carries the meaning of honesty and trustworthiness. *Xin* is afforded so much importance that Confucius states: “A man cannot establish himself in society without trustworthiness” (*The Analects of Confucius*, Chapter 2). Confucius specifies *xīn* to be one of the five sub-virtues of *ren* parallel with *gōng* (respect), *kuān* (tolerance), *mín* (diligence) and *huī* (share). Trustworthiness is the virtue which underpins the order and harmony of society.

How can man gain trustworthiness? According to Confucius, people should practise what they say and achieve results. It is difficult for someone who likes talking big to gain trustworthiness (*The Analects of Confucius*, Chapter 14), and people should be careful in saying or making promises in order to be trustworthy. A man cannot enjoy the trust of his superiors unless he enjoys the trust of his friends, a man cannot enjoy the trust of his friends unless he shows affinity and respect to his parents (*Mencius*, Chapter 8). This reflects the importance of *xiāo* (Filial Piety), which acts as the root virtue in the ethical system of Confucianism. On the other hand, people should value trustworthiness but not stick to it inflexibly (*The Analects of Confucius*, Chapter 15). The application of trustworthiness should accord with the rules of *ren*, *yí* and *li*, meaning that people should judge what is good and bad, and right and wrong, before applying trustworthiness.

### 6.5.6 忠 Zhōng (Loyalty)

*Zhōng* (Loyalty) is a crucial concept in Confucianism. Confucius claimed that it is *zhōng* (Loyalty) and *shù* (Empathy) which links all his teaching together like a thread when he was asked by his disciple Zengzi (*The Analects of Confucius*, Chapter 4). By loyalty, Confucius meant to serve with all one’s heart unfeigned. The practice of *zhōng*, *xīn* and *yí* is an effective way to develop morality (*The Analects of Confucius*, Chapter 14). There are loyalty to family, loyalty to friends and loyalty to one’s superiors.

*Zhōng* (Loyalty) in Confucianism is sometimes misunderstood as loyalty to one’s superiors. Loyalty to one’s superiors does not mean being obedient to them and following all their orders without question since it is a precondition for the loyalty to one’s superiors that
those superiors treat him nicely and according to the requirements of *li* (*The Analects of Confucius*, Chapter 3). Otherwise, the loyalty is not necessary. The true loyalty is to love him, help him, tell him what he does wrong and make suggestions to him as to how to correct it (*The Analects of Confucius*, Chapter 14). Loyalty should be consistent with the rules of *ren* and *yi*. Loyalty to the virtues of *ren* and *yi* is more important than loyalty to a family, friend or superior.

6.5.7 恤 Shu (Empathy)

Shu (Empathy) is considered to be one of the two most important virtues throughout the teachings of Confucius, as concluded by Zengzi. When he was asked by his student Zigong if there is a virtue which is worth practising throughout life, Confucius figured out that it is *shu*, which can be defined as “not to do to others as you would not wish to be done to yourself” (*The Analects of Confucius*, Chapter 14). *Shu* is the empathy that “extends from oneself to others”. This interpretation is repeated in *Doctrine of the Gooden Mean* (*Zhong Yong or Chung-yung*) where it is suggested that people who achieve *shu* are close to the way of the Heaven. Another interpretation is presented in *Great Learning*:

“If you do not like the way your superiors treat you, then do not treat your subordinates in this way; if you do not like the attitude your subordinates towards you, then do not present this attitude towards your superiors; if you do not like the behaviour of the person in front of you, then do not copy it for the one behind you”

Confucius suggested *shu* to Zigong because he had not achieved it yet. When Zigong claimed: “I do not impose on others what I do not want to be imposed on”, Confucius commented: “You are not doing that good” (*The Analects of Confucius*, Chapter 5). As for Confucius, *shu* is very difficult to achieve because people tend to ask others to do the things they do not want and give the things they do not like to others. Instinctually, people are selfish and reluctant to share. This is the rationale of education and promotion of virtues.

“Not to do to others as you would not wish to be done to yourself” is the interpretation of *shu* from the negative perspective. The positive perspective of *shu* is the role it plays in achieving *ren*. According to Confucianism, the aim of the practice of virtues is not only to realise self-accomplishment but also to help others to do so. “Not to do to others as you would not wish to be done to yourself” is therefore the basic requirement of *shu*, while “seek self-accomplishment and help others to do so” is the high level requirement. Menius
crystallises this *shu* to be “Love and respect the old people in my family and then extend to the other old people; foster and educate the children in my family and then extend to the other children” (*Mencius*, Chapter Lianghui Wang). It also reflects the virtue of *ren*.

*Shu* in Confucianism encourages people to extend from themselves to others and treat others in the same they treat themselves. Its premise, however, is that the way in which someone treats himself should be reasonable. Thus, there should be a benchmark and judgement of whether to extend or how to extend. Self-discipline, tolerance and equality are to be taken into account. Self-discipline is to behave according to the rules of virtues and to avoid selfishness in treating others. Tolerance means that one should consider others by positioning oneself with understanding and sympathy in the place of others. Equality refers to the similar desires that human beings have.

**6.5.8 孝 *Xiao* (Filial Piety)**

*Xiao* (filial piety) is interpreted as obedience, respect, affection and obligation towards ones parents (Cheng, 1997). The relationship between children and parents is one of the most important ones stressed in Confucianism. In the time before Confucius, the duty of filial piety was a recurring theme because in the ancient patriarchal society, organisation into clans and families was of great importance, with the members of a family being graded into a hierarchy in which each had his or her recognised function and status. The maintenance of the family depends on helpfulness and harmony with each other. Confucius recognised that the virtue of filial piety is very important to the stability of family and society. *Xiao* is so important that Confucius considers filial piety to be the root of *ren* (*The Analects of Confucius*, Chapter 1). Filial piety is not just the affair of one person or one family, but relates to the stability and peace of society as a whole.

Confucius confirms one benchmark of *xiao* to be “aspiration accords with the virtues his father taught him and persists after his father’s death” (*The Analects of Confucius*, Chapter 1). The teaching of filial piety is fundamental in the training of the young, since correct behaviour beyond the confines of family is but an extension of these virtues. The most important requirement of filial piety is the respect from the bottom of heart as Confucius argued “there will be no difference between fostering a dog and providing for parents without respect” (*The Analects of Confucius*, Chapter 2).
It has to be stated that the parent-child relationship in Confucianism is a sort of reciprocal relationship rather than a one-side affair. On the one hand, the children serve their parents with filial piety, while on the other hand the parents treat their children with kindness and care. Filial piety in Confucianism is also sometimes misunderstood as children’s unconditional obedience towards their parents. There is a precondition to obey the parents as long as their demands accord with what is right. Confucius argued that a filial son has the right and duty to remonstrate gently if he believes his parents to be in the wrong (The Analects of Confucius, Chapter 4). Mencius clearly figured out that “it is a violation of filial piety if children do not exhort the parents to their misconducts which are inconsistent with the requirements of the virtues (Mencius, Chapter Lilou).

6.5.9 修己 Xiuji (Self-cultivation)

Xiuji (Self-cultivation) is given much importance in the realisation of moral integrity in Confucianism. It implies a self-reflective understanding of the self. Whether one’s self has or does not have an independence of its own, it is always the centre and source of doing things, moving one’s own body, or making a choice in view of a goal or a vision. In such a notion of self-cultivation, the self is that which engages itself with people and things in the world but which is reflected upon for improvement and transformation from a reflective point of view that arises from the active self. Confucius, therefore, calls the self which is to be cultivated or self-cultivated in light of its own act of reflection the ji.

Confucius claims ji as both an object and a subject of universal or general self-reference according to statements such as “Don’t make a friend of one who is not as moral as oneself (The Analects of Confucius, Chapter 1)” or “If one wants to establish oneself, he should establish others; if one wants to perfect oneself, he should perfect others (The Analects of Confucius, Chapter 6)” or “If one see a person who behaves morally, one should learn from him to be the same good person; if one see a person who behaves immorally, one should reflect on himself and criticise internally (The Analects of Confucius, Chapter 4).” Confucius considers the self that is capable of reflecting on oneself and criticising oneself as the reflective self, which is the subject of self-reflection and self-criticism.

The reason why self-cultivation is encouraged in Confucianism is related to the nature of human beings. According to Xunzi, human beings are born with a variety of desires and an original nature to obtain. It is easy, however, for human beings to behave selfishly,
viciously and unrighteously which leads to disorder in society. This is the reason why the ethical system is established, as Xunzi explains “The rules of proper conduct (li) and justice (yi) are created to guide humans to be moral practitioners” (Xunzi, Chapter 26). Confucius describes the person who practises self-cultivation well, and thus achieves moral integrity, as “junzi”. It is Confucius who extended the meaning of junzi to be a person with moral cultivation, compared to its original meaning of a person with the status of nobility. The opposite notion of junzi is xiaoren (small-minded person) who is concerned with personal interests and benefits. The methods for self-cultivation are implied in the descriptions of the characteristics of junzi relating to the practice of the virtues of ren, yi, li, zhi, xin, zhong, shu, and xiao.

Since ren (humanity) is the leading ethical Confucian value, the sum of all virtues, junzi is the person practising the way of humanity. Since xiao (filial piety) is the root of humanity and all the virtues, junzi considers filial piety to be the most basic moral requirement. “For junzi, there is nothing in the world that has to be done like this or not like this as long as it accords with yi” (The Analects of Confucius, Chapter 4). “Justice is superior to life” is considered to be one of the lofty ethical benchmarks for junzi. Junzi makes sure all his conduct accords with the rule of li (propriety). Junzi attaches importance to knowledge and learning, which can lead to wisdom. Junzi stresses doing more than talking big in order to gain xin (trustworthiness). Junzi spares no efforts to contribute to his family, friends or organisations with loyalty. Junzi treats others same as he treats himself and adopts the requirements of shu (empathy). To summarise, self-cultivation is the self-consciousness of moral cultivation by adopting the rules of all the virtues.

6.5.10 長遠觀 Changyuan Guan (Long-term Orientation)

Confucianism is criticised for its apparently contradictory time orientation, which is both past-oriented and future-oriented (Adler, 2002). An argument can be made to support its past-orientation on account of its purpose, however. In Confucianism, the purpose of looking to the past is to gain some insights for the future. When asked by his student Zizhang about li (propriety) in the future, Confucius suggests that he should refer to how the rules of li were adopted and developed in past dynasties (Analects of Confucius, Chapter 2). The reason why Confucius attaches importance to tradition is that it allows one to gain experience by accepting the merits and rejecting the defects in the past. Confucius believes that “What has happened in the past cannot be changed while there is much to be done in the future”
(Analects of Confucius, Chapter 18). The saying “Given time, water drips will drill a hole in stone” indicates that Chinese people attach much importance to patience and a long-term orientation (Rarick, 2008).

The long-term orientation of Confucianism can be reflected by the emphasis on a target, planning and preparation. It is important to set a target because only after a target is established can the mind be determined and then calm down to consider it, and at last achieve it (The Great Learning, Chapter 1). According to Confucius, “The man who has no long-term considerations for the future will come across troubles close at hand (Analects of Confucius, Chapter 15)”, “Haste makes waste. The man who focuses on the profits shortly ahead of him will never gain tremendous success in the future (Analects of Confucius, Chapter 13)”. Confucianism believes that “Good preparation secures success while poor preparation leads to failure (The Doctrine of the Mean, Chapter 20)”.

The long-term orientation of Confucianism is also reflected in the concept of “Frugality” and the principle of “Utilise Timely and Temperately”, both of which relate to conservation for future, including the conservation of natural resources. Frugality is highly advocated in Confucianism, as shown by the statement of “Frugality is the requirement of propriety, rather than extravagance (Analects of Confucius, Chapter 3)”. Extravagance is opposed because it is arrogant and wasteful, and is thus inconsistent with the ethical regulation of propriety (Analects of Confucius, Chapter 7). The application of Frugality to how one exploits resources serves to conform to the principle of “Utilise Timely and Temperately”. Confucianism is against the excessive exploitation of natural resources: for example, Confucius declared that “People should not use the net with a fine mesh for fishing and should not kill birds in their nests (Analects of Confucius, Chapter 7)”. This demonstrates the idea of conservation and the protection of natural resources for the future.

The Master Mencius criticised the short-sighted immoderate exploitation for immediate economic benefit by giving an example of Niushan where the once beautiful forest ended up desolate (Mencius, Chapter Gaozi). He proposed that the right way to use natural resources by saying “The grains will be substantial if the season for farming is not violated; there will be inexhaustible fish for humans if the nets with a fine mesh are not used; the woods will be adequate for the future if the trees of the forest are felled at the right time (Mencius, Chapter
Lianghui Wang)”. This is a good interpretation of the principle of “Utilise Timely and Temperately”.

6.5.11 和 He (Great Harmony)

He is deemed to be the ultimate and ideal value of Confucianism, and even the cardinal Chinese cultural value (Chen, 2002). As Mencius commented, harmony between people is more important than good timing and good environment (Mencius, Chapter Gongshun Chou). The practice of the other values (humanity, righteousness, propriety, wisdom, trustworthiness, filial piety, loyalty, empathy) is to achieve he (harmony) within the world. He in Confucianism not only refers to the relationships between human beings, but also the relationship between man, society and nature. It is difficult to find an English translation that matches he perfectly. Although “harmony” is considered to be the most proper translation of he, it cannot reflect and reveal the profound meanings connoted in the concept, such as “the Mean” and “the requirement of li (propriety)”. He in Confucianism is not only the ideal situation of relationships, but also works as a way of thinking and principles of action. He in this study, therefore is translated as “Great Harmony” in order to attempt to express its full connotations.

Four perspectives are especially important for the understanding of Great Harmony. First of all, Great Harmony is the harmony of the system as a whole rather than the harmony between its individual parts. In other words, the system is composed of individual parts, and while there might be conflicts and contradictions between different parts, there is harmony in the whole. The Great Harmony of society, therefore, is built on the harmony of families and individuals. Secondly, Great Harmony is a harmony of contradictions, according to the Doctrine of the Mean which requires “being moderate and never going to extremes”.

Confucius acknowledges contradictions and recognises the harmony between them. He explains this by saying that the constant way does not change, but some adaptation to changing circumstances is necessary. “There was the sage Shun who was indeed wise. He liked to question others and analyze their words. He concealed what was bad in them, and displayed what was good. He took hold of the two extremes, determined the Mean, and employed it in his government” (The Doctrine of the Mean, Chapter 6). “The two extremes” shows that Confucius acknowledges that contradictions exist in respect to everything. These contradictions, although opposite to each other, may still to complete each other. He also
praised utilising contradictions in a way that leads to practical solutions to problems. By adopting the middle way, excess and deficiency may be avoided. Since the desirable way is usually a compromise, people should do neither too much nor too little. The Mean is what Confucius identifies as the essence of a thing. “Junzi (Gentleman) embodies the course of the Mean; Xiaoren (Small-minded man) acts contrary to the course of the Mean.” (The Doctrine of the Mean, Chapter 2). According to the Mean, people should avoid leaning to either side, going too far, or going not far enough. The gentleman is perfectly impartial, for he can serve as a mediator among different people. As for the small-minded man, he goes against the Mean and gangs up with other scoundrels for selfish interests, and even defies his superiors. The Mean is regarded as the highest virtue through which to reconcile contradictions and thus to “reach the central harmony”.

Third, Great Harmony is not the denial of change and diversity. It is a relative stable and balanced situation that enables change, rather than a dead dogma. What is more, Great Harmony encourages diversities that can be balanced. Simply agreeing with others without moral or practical principles is not considered to be Great Harmony and thus should be rejected. As Confucius said, “The gentleman seeks harmony with others but without simply agreeing with them. The small-minded man echoes others but without agreement within” or “The gentleman is affable, but not adulatory; the small-minded man is adulatory, but not affable” (The Analects of Confucius, Chapter 13). Confucius is attempting to prevent the old uniformity from collapsing by conciliating the contradictions at a historical juncture. “Affability”, therefore, is compromise and conciliation. Great Harmony requires people to maintain harmonious relationships even though they may have different views. “Harmony” and “identity” are different. Achieving harmony is like cooking, which uses water, fire, salt and several kinds of sauces to make food. Only by mixing different ingredients together can the cook adjust the taste properly. So it is with social and political affairs. As for different opinions, be they from the ruler or from ministers there ought to be expressed directly. Only when the ruler and his ministers can discuss these opinions with each other can a situation be brought about in which affairs are conducted smoothly and the common people are peaceful. Otherwise, there can be stagnation.

Fourth, Great Harmony can only be achieved through the practice of the Confucian virtues. As discussed in previous sections, ren (humanity) is the fundamental virtue of Confucianism. As long as people have the willingness to pursue ren consciously, and thus
love and treat others with humaneness, a harmonious relationship between oneself and others can be established. As long as people “Consider yi (Justice) in front of Benefit”, there would not be too many conflicts of interest. The ideal state of application of li (propriety), the rule of proper conduct and good manners, is the achievement of a harmonious social relationship. With zhi (knowledge and wisdom), people can have a better understanding of themselves, other people, society, nature, and then the world. And thus people know how to position themselves in the world, how to behave themselves, and how to treat others. With xin (trustworthiness), people can trust others and be trusted. With zhong (loyalty), one avoids the threat of betrayal among family, friends and organisations. So long as people treat others the same as they treat themselves according to the requirements of shu (empathy), there would be more satisfaction and agreement than resentment. The harmony of family can be realised through filial children (xiao). If people can practise self-cultivation, the moral level of human beings will be promoted.

Four harmonious relationships are identified as being achieved in Great Harmony in Confucianism: the internal harmony of the human body, the harmony among different persons, the harmony between a person and society, and the harmony between human beings and nature. This refers not only to the physical aspect but also the mental aspect. Only when the internal harmony of the human body is achieved can people be healthy, and thus behave properly and get on well with others or build harmonious relationships with others. The harmony between a person and society requires people to balance their interests with the needs of society. In other words, it requires people to practise self-cultivation to promote their moral standards.

The harmonious relationship between nature and human beings is described as an ideal situation, which is called “Unity of Heaven and man”. In Confucianism, the supreme dominator of nature and human society is interpreted as tian (Heaven). Confucian scholars believe that nature moves and changes according to the laws inherent in itself which is called “The Way of Heaven”. As long as people follow the natural laws, they will obtain a good result; otherwise, they must suffer disaster (Xunzi, Chapter 17). As for the relationship between human beings and nature, the virtues are extended to the way human beings treat nature. For example, the virtue ren (humanity) is extended from “love towards other people” to “love towards other beings”. Confucian environmental ethics as they relate to sustainable tourism will be discussed in detail in Chapter Nine.
6.6 Conclusion

Although it has been criticised and changed, Confucianism is the core component of the Chinese value system. It affects the Chinese people significantly and still plays a key role in the formulation of their values and the guidance of behaviour. In this study Confucianism refers to the ideas, thoughts and values reflected in the classic works by Confucius and his followers, as well as the understandings and interpretations in the history, excluding exaggerated or biased interpretations and critiques of Confucian ideas and values. Theme nine of conceptual research is Synthesising concepts, and thus synthesises existing knowledge of the classic Confucian works and the interpretations of later scholars. Eleven key Confucian values are identified and extracted. Ren (Humanity) is deemed to be the source of all virtues and as being embodied in the other values. Yi (Righteousness or Justice) is suggested to be considered in front of benefits. Li (Propriety) refers to all the socially accepted regulations of proper conduct and good manners. Zhi (Wisdom) emphasises knowledge and learning. Xin (Trustworthiness) is the virtue which underpins the order and harmony of society. Zhong (Loyalty) requires the devotion to family, friends, organisation and the country. Shu (Empathy) encourages people to treat others in the same way they treat themselves. Xiao (Filial Piety) is the obedience, respect, affection and obligation towards the parents. Xiuji (Self-cultivation) is self-conscious moral cultivation by adopting the rules of all the virtues. The chuanyuan guan (long-term orientation) of Confucianism can be reflected by the emphasis on a target, planning and preparation. He (Great Harmony) is the ideal situation arising from the achievement of the other virtues.

The aim of this synthesis of the eleven Confucian values is to translate them into the understanding of sustainable tourism. This translation will be presented in Chapter Nine along with a discussion of how they relate to each other. Chapter Seven is going to adopt the same structure as this chapter in terms of understanding Taoism and its values.
Chapter 7 Taoism and its Values

7.1 Introduction

Confucianism is delineated so widely that sometimes it is misleadingly confused with Chinese culture itself and Western people tend to associate everything Chinese with Confucianism (Goldin, 2011). This might be attributed to Matteo Ricci (1552-1610) who first introduced Chinese religion and philosophy to Western readers by stating Chinese culture was established by the great sage Confucius similar to Christ (Goldin, 2011). It is an oversimplification to use the term “Confucian values” to describe Chinese culture (Yin, 2003). Some of the values commonly considered as “Confucian” may actually be influenced by the doctrines of Taoism (Yin, 2003). Taoism coexists with Confucianism, or sometimes was interwoven with it or accommodated within it to survive due to the dominant role of Confucianism in China’s feudal societies. As Yang (1961) states, all religions in China have adopted some of the most influential Confucian values or made compromises with them. In fact, Taoism also made use of Confucianism as a cover and a means to extend its own influence (Chang, 2011). Furthermore, Confucianism and Taoism supplemented each other (Zhang, 2007). A study of Chinese cultural values would therefore be biased and abridged were it only to concentrate on Confucianism without investigating Taoism.

This chapter explores the knowledge of Taoism in order to extract its values. The study of Taoism encounters the same challenge in terms of translation and interpretation as was explored in respect to Confucianism in Chapter Six. A table which presents the key terms of Taoism with regards to Chinese characters, Chinese Pinyin pronunciations, pronunciations Western people familiar with, and English words with similar meanings is provided in the Appendix. As explained in Chapter Four, this is the second chapter of the practice of conceptual research in this thesis. At the beginning, it briefly introduces a content analysis of Taoism to illustrate how the findings are achieved. This chapter adopts the same themes of conceptual research approaches as in Chapter Six. Theme one, Defining concepts, is used to define Taoism, while Historical analysis of concepts (theme three) engages with its origins, development and evolution. Key Taoist values are extracted with the application of theme nine, Synthesising concepts, through the interrogation of related literature.
7.2 The content analysis of Taoism

Similar to Chapter Six, this section further explains the process of content analysis in terms of the literature selected, the conceptual research approaches used and the main points, as distinct from the general illustration in Chapter Four. While section 4.4 focuses on the sampling method (purposive sampling) and coding, this part presents the detailed findings of the content analysis (see Table 7.1) and clarifies how it underpins the definition, historical development and values of Taoism. The data is sourced from books and journals which are relevant to Taoism (i.e. its definition, clarification, development and critique). Twenty-nine works are selected using purposive sampling, including 14 journal articles and 15 books (eight in Chinese). Twenty-five of these are typical cases, two are critical cases and two books are categorised as both typical cases and critical cases.

As discussed in section 4.4.5, this chapter adopts three conceptual research approaches, which are, theme one, Defining concepts, theme three, Historical analysis of concepts, and theme nine, Synthesising concepts. The selected works are carefully read and re-read with notes taken. The notes refer to the definition of Taoism, as well as its origin, development, and values. Then the notes are analysed, revised and categorised into sub-units. The process is repeated until no more sub-units could be found. Following the analysis of relevant notes, no commonly agreed definition of Taoism is able to be generated, so the most suitable one (Taoism Philosophy) is adopted for this study. This leads to a concentration on Taoist Philosophy for the historical analysis of Taoism. Since there is a long tradition of debate in respect to Taoist values, the classical works are emphasised as a means of synthetizing those values.
Table 7.1 Details of content analysis of Confucianism

<table>
<thead>
<tr>
<th>Author(s)</th>
<th>Book/ Journal Article</th>
<th>Title</th>
<th>Year</th>
<th>Conceptual Research Approaches Used</th>
<th>Main Points</th>
<th>Typical Case(TC)/ Critical Case(CC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ames,R.T.</td>
<td>Journal article</td>
<td>Taoism and the Nature of Nature</td>
<td>1986</td>
<td>One, five</td>
<td>Introduce Taoism and discuss its ideas on Nature</td>
<td>TC</td>
</tr>
<tr>
<td>Chang,C. Y.</td>
<td>Book</td>
<td>Creativity and Taoism:A study of Chinese philosophy, art and poetry</td>
<td>2011</td>
<td>One, three</td>
<td>Review the study of Taoism in terms of its philosophy, art and poetry relating to creativity</td>
<td>TC</td>
</tr>
<tr>
<td>Cheng,C. Y.</td>
<td>Journal article</td>
<td>On the Environmental Ethics of the Tao and the Ch’i</td>
<td>1986</td>
<td>One, five, six</td>
<td>Critique the Western environmental ethics and advocate the Taoist ideas</td>
<td>CC</td>
</tr>
<tr>
<td>Cheng,H., &amp; Schweitzer,J.C.</td>
<td>Journal article</td>
<td>Cultural values reflected in Chinese and US television commercials</td>
<td>1996</td>
<td>Eight, nine</td>
<td>Synthesise Chinese cultural values and how they are reflected in television advertisements</td>
<td>TC</td>
</tr>
<tr>
<td>Clarke,J.J.</td>
<td>Book</td>
<td>The Tao of the West: Western Transformations of Taoist Thought</td>
<td>2002</td>
<td>One, three, six, eight</td>
<td>Introduce Taoism to the West world with regards to its definition,development, ideas and transformation</td>
<td>TC</td>
</tr>
<tr>
<td>Creel,H.G.</td>
<td>Book</td>
<td>What is Taoism and other studies in Chinese cultural history</td>
<td>1982</td>
<td>One, three, four</td>
<td>Discuss what Taoism is and its scope as well as the three schools of Taoism</td>
<td>TC/CC</td>
</tr>
<tr>
<td>Fan,Y.</td>
<td>Journal article</td>
<td>A Classification of Chinese Culture</td>
<td>2000</td>
<td>Four, nine</td>
<td>Synthesise and make a classification of Chinese cultural values</td>
<td>TC</td>
</tr>
<tr>
<td>Author</td>
<td>Type</td>
<td>Title</td>
<td>Year</td>
<td>Pages</td>
<td>Abstract</td>
<td>Source</td>
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<tr>
<td>Ip,P.K.</td>
<td>Journal article</td>
<td>Taoism and the foundations of environmental ethics</td>
<td>1983</td>
<td>One, five, eight</td>
<td>Present the knowledge of Taoism addressing on its philosophical underpinnings for environmental ethics</td>
<td>TC</td>
</tr>
<tr>
<td>Laozi</td>
<td>Book(in Chinese)</td>
<td>Laozi(Tao and Te Ching)</td>
<td>Old times</td>
<td>One, two, five</td>
<td>Explain the core concepts of Tao, Te, Wu Wei and so on as well as the philosophy of actions</td>
<td>TC</td>
</tr>
<tr>
<td>Liezi</td>
<td>Book(in Chinese)</td>
<td>Liezi</td>
<td>Old times</td>
<td>One, three, five</td>
<td>Develop Taoism and illustrate it by using stories</td>
<td>TC</td>
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<tr>
<td>Miller,J.</td>
<td>Book</td>
<td>Taoism and Nature</td>
<td>2003</td>
<td>One, three</td>
<td>Explore the understanding of Nature in Taoism and the implications for ecology</td>
<td>TC</td>
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<td>Munro,D.J.</td>
<td>Book</td>
<td>Individualism and holism: Studies in Confucian and Taoist values</td>
<td>1985</td>
<td>Two, three, four</td>
<td>Explore the Confucian and Taoist values historically focusing on individualism and holism</td>
<td>TC</td>
</tr>
<tr>
<td>Qu,A.</td>
<td>Journal article(in Chinese)</td>
<td>Traditional Chinese environmental ethics and sustainable development</td>
<td>2008</td>
<td>Three, eight, ten</td>
<td>Explore the relationship between traditional Chinese environmental ethics and sustainable tourism</td>
<td>TC</td>
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<tr>
<td>Sabelli,H.</td>
<td>Journal article</td>
<td>The Union of Opposites: From Taoism to Process Theory</td>
<td>1998</td>
<td>One, two, nine, ten</td>
<td>Explore the coexistence of opposites and how they work with the presentation of Tao as social philosophy relating to process theory</td>
<td>TC</td>
</tr>
<tr>
<td>Author(s)</td>
<td>Type</td>
<td>Title</td>
<td>Year</td>
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<tr>
<td>Saso, M.R.</td>
<td>Book</td>
<td>Taoism and the rite of cosmic renewal</td>
<td>1990</td>
<td>One, three, eight</td>
<td>Review the development of Taoism and its philosophy</td>
<td></td>
</tr>
<tr>
<td>Sylvan, R., &amp; Bennett, D.</td>
<td>Journal article</td>
<td>Taoism and Deep Ecology</td>
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<td>One, five</td>
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<td>TC</td>
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7.3 Defining Taoism (theme one Defining concepts)

In this section, different definitions or understandings of Taoism are critiqued, evaluated or synthesised according to the form of theme one of conceptual research approaches. The relationship and difference between Philosophical Taoism and Religious Taoism are discussed. Compared to the wide spread of Confucianism, Taoism, which originated from 老子 (Laozi) and 庄子 (Zhuangzi) in the late Zhou Dynasty (around 500 BC) has been recognised as the most influential traditional Chinese wisdom in the non-Confucian world (Creel, 1982).

As Socrates discovered two and a half millennia ago, trying to define terms that play a key role in intellectual and cultural life can be a frustrating business. The scholars of Taoism (sometimes known as Daoism) have to admit that it is difficult to say what Taoism is. Taoism, either as a religion or a cultural system, incorporated almost everything in terms of the process of development and evolution. Robinet (1997) claims that there is no consensus of opinions among scholars specialising in Taoism as to what it is. The question, “What is Taoism?”, was proposed by H.G Creel in 1956 in an attempt to break down the term “Taoism” as an all-embracing category (Clarke, 2002). Welch (1966) asserts that Taoism is a very broad term that embraces “the science of alchemy; maritime expeditions in the Isles of the Blest, an indigenous Chinese form of yoga; a cult of wine and poetry; collective sexual orgies; church armies defending a theocratic state, revolutionary secret societies; and the philosophy of Lao Tzu” (p.88). Different opinions consider Taoism as nothing more than “a wise and merry philosophy of living” (Saso, 1990). Chang (2011) sees Taoism as philosophy teaching the doctrine of following nature.

Creel (1982) found in Taoism, in respect to its pervasive influence on Chinese culture and politics, no single definite moral philosophy or vision of life’s purpose, but rather a variety of teachings that are better seen as distinct traditions. He discovered that the debates on “what is Taoism” are due to the distinction between 道家 Daojia (Philosophical Taoism) and 道教 Daojiao (Religious Taoism). Philosophical Taoism is a school of philosophy which addresses Laozi as the founder and the book of Laozi (Tao Te Ching) as the classic work, and believes in the Tao (the way) as the origin of everything and all phenomena without having ideology, consciousness and temperament. What is more, Taoism believes that Te (virtue) is
the way of “how to attain the Tao”. It advocates Wu Wei (no action in violation of the natural laws), gain by not scrambling for it, and maintaining a harmonious relationship with nature. With regards to the mission of this chapter to extract Taoist values, this study adopts 道家 Daojia (the philosophical tradition of Taoism) excluding the religious elements (the teachings and rituals whose ultimate goal was physical immortality) and other cultural compositions of Taoism (architecture, medicine, music, etc.).

7.4 Historical analysis of Taoism (theme three Historical analysis of concepts)

This section will review the origins, development and evolution of Taoism. Although, as explained above, Taoism in this study refers to Philosophical Taoism, the development of Religious Taoism is involved in the sense that it played a role as a medium for the inheritance of the Taoism thought.

Taoism has a significant influence on the development of Chinese philosophy and politics (Wang and Stringer, 2000). Taoism originated from Laozi in the late Period of Spring and Autumn (around 500 BC). But the notion of “Taoism” was not proposed until the early Han Dynasty (around 200 BC). It is named “Taoism” because the belief in “Tao”. Laozi extended the notion of Tao from “The Way” to a philosophical category of the supreme substance as the origin of everything. He not only abstracted the philosophical Tao but also asserted that “reversion is the action of Tao” (Laozi, Chapter 40). Two opposite sides of the contradictions (Yin and Yang) are interdependent and reciprocally transformed. It is highly recommended to follow the Tao and to take no action in violation of the natural laws (Wu Wei).

Zhuangzi (369-286 B. C.), a follower of Laozi, is another remarkable master of Taoism. He also considered Tao to be the highest principle of the cosmos, which exists eternally. Tao is the most primitive form of existence and the primary noumenon of spirit that gives birth to and fosters all things (Qu, 2008). It cannot be definitively defined because it is intangible and supernatural. He further developed the interdependence and reciprocal transformation to be “Uniformity of All Things”, which rejects any incontestable benchmark of right and wrong or the negation of the objectivity of the criterion of cognition. With the adoption of Wu Wei, Zhuangzi translated it into “Peripateticism” which advocates the absolute freedom of spirit (Wang and Stringer, 2000). Although it did not have as many followers as Confucianism, Taoism presented its value through its contribution to philosophy.
Taoism was prosperous in the early Han Dynasty (around 200 BC). With the reflections on the political failure of the Qin Dynasty, the philosophy of *Wu Wei* was adopted as the political principle of development. It was called “Instrumental Taoism”, which deems that the civilisation and political system are the embodiment of Tao (Xiao and Li, 2008). Taoism was then oppressed, however, when Confucianism was designated as the official ideology for political government by the emperor Han Wu (140-87 BC). Taoism still played an important role in the development of Chinese culture, however, and experienced a renaissance in the Wei and Jin dynasties (220-589 AD), where it was labelled as “Wei Jin Metaphysics”.

Metaphysics in the Wei-Jin Period revived the thought of Laozi and Zhuangzi, and transformed the theological cosmology of “the correspondence of Heaven and Man” into the ontology of the debate on “being and nonbeing, and of the fundamental and the incidental.” This is an important turning point and leap forward in philosophical thinking. The Metaphysicists believed that behind the realistic world there is an original substance that produced and dominates the phenomenal world (Xiao and Li, 2008). This original substance is called “nonbeing”, “Tao”, or “Heavenly way of Nature”, and is present in and unifies myriad things. “Being” is derived from “nonbeing” and “activity” is derived from “tranquillity”. Through the debate on the differences and similarities of Confucianism and Taoism, Metaphysics demonstrates that the concept of “Nature” held by the Taoists and the “ethical code” of the Confucians are identical (Zhang, 2007). Thus, it promoted the synthesis of Confucianism and Taoism.

The development of Taoism after Metaphysics fluctuated from period to period. Taoism developed to the height of its fame in the early Tang Dynasty (around 620 AD) when it overtook Confucianism as the principle culture promoted by the state. In Yuan Dynasty (1271- 1368 AD), Taoism was designated as the national religion so it had a further opportunity to expand. On the other hand, Taoism was intermingled with Confucianism and formed Neo-Confucianism; and integrated with Buddhism, resulting in Chan Sect (Xiao and Li, 2008). Taoism has been highly valued in modern times as the Chinese have sought to resuscitate their traditional culture.
7.5 Key Taoist values (theme nine Synthesising concepts)

The Taoist values are the principles which guide and govern the spirit and behaviours of many Chinese people (Zhang, 2007). With the adoption of theme nine, Synthesising concepts, three key values (Tao, Yin and Yang, Wu Wei) are extracted through the interrogation of both classic and modern Taoist literature. It has to be noted that those values which may overlap with Confucianism and Chinese Buddhism, or may be too religious, are excluded.

7.5.1 道 Tao (The Way)

道 Tao (The Way) originally meant a road for people to pass along, but later it came to mean the “right way”, and then, by extension, the law and norm. In the Spring and Autumn Period, people used it to express the law of the movement of Nature and celestial phenomena as well as the norm of human behaviour, for example, the “Way of Heaven”, “Way of Man” and so on. It was Laozi who first articulated the “way” as a philosophical category of the supreme substance, regarding it as the general origin of all things in the world and giving it a systematic demonstration in the philosophical sense (Clarke, 2002).

At the very beginning of Laozi, it is said: “The Tao that can be told is not the eternal Tao. …” (Laozi, Chapter 1). Laozi also claims that “Tao is eternal and has no name” (Laozi, Chapter 32). What is the exact connotation of the Tao in the Laozi? There has been controversy about this among academics for a long time. The Laozi is full of references such as “Yet within it is an image”, “Yet within it is a substance”, “Yet within it is an essence. This essence is quite genuine” (Laozi, Chapter 21). These sayings refer to a substance with a material attribute. On the other hand, it says, “And returns to that which is without substance”, “This is called the shape that has no shape, the image that is without substance” (Laozi, Chapter 14). Here, Tao has become something dim, uncertain and intangible, and seems to have a double nature of self-contradiction in which spirit and matter are not clearly distinguished from each other. Nevertheless, Tao as the supreme origin of all things in the universe has been categorised after all, and the constitution of the universe has been explained in a general term (Cheng, 1986). This is a deepening of cognition as compared with the view of primitive materialism, which explains the variety and unity of things by citing particular material objects in Nature.

Laozi tries to abstract a unified Tao from the variety and complexity of concrete material objects, for example, “Tao is forever nameless” (Laozi, Chapter 32), “When the uncarved
block shatters, it becomes vessels” (Laozi, Chapter 28). The reasoning is from the concrete to the abstract, from the particular to the general, and from material objects to the origin. So the abstraction of Tao breaks away from the realistic world and becomes “nonbeing”, which “has before Heaven and Earth”, or the “dim”, which “cannot be asked the reason why it is so”. So Tao has been rendered empty and is the “nonbeing” from which the myriad creatures are derived. “Tao is its own source and its own root, existing since time immemorial, before Heaven and Earth came into” (Zhuangzi, Chapter The Great Teacher). It is the most primitive form of existence and the primary noumenon of spirit that gives birth to and fosters all things.

There is also a dynamic side of Tao. Laozi discussed contradiction on the basis of the summation of the results of ancient dialectical thought and the generalisation of the contradictions in actual society and Nature. Since Laozi stated that there are contradictions in things themselves and the two sides of any contradiction change into the opposite, or to conclude “reversion is the action of Tao” (Laozi, Chapter 40). Tao is also described as a process of change and transformation. In fact, everything in the universe is the result of transformations governed by the dialectical interactions of Yin and Yang. A detailed explanation of Yin and Yang will be presented in the following section.

Since Tao is the general origin of all things, what is the mode in which all things in the universe are produced; in other words, what is the role Tao plays in such a process? The typical propositions are as follows: “The Tao produced the one; the one produced the two; the two produced the three; and the three produced the myriad things. The myriad things carry the yin and embrace the yang, and through the blending of the material force they achieve harmony” (Laozi, Chapter 42), “There are four great things in the universe; Man is one of them apart from Earth, Heaven and Tao. Man models himself after Earth, Earth models itself after Heaven, Heaven models itself after the Tao, and Tao models itself after Nature” (Laozi, Chapter 25). This opinion downplays the idea of the “Mandate of Heaven” revered by Confucianism. It indicates that Tao governs the destiny of all things; and man cannot depart from it, whether his behaviour is good or bad. Nevertheless, although all things grow by depending on Tao, it does not interfere with or manipulate them, nor does it glory in its success and greatness. This is the key to understanding the importance of Tao. The dominating function of Tao is just to let all things follow their own course, and it does nothing itself. That is to say, Tao is only a functioning law that exists universally and obeys Nature.
It is evident that Tao is intimately linked with and concerned with the natural. But what is the relationship between Nature and Tao? Is Tao supra- or super-natural? Tao is certainly not supernatural, and it does not transcend natural things in the fashion of Western supernatural religions; rather Tao both orders and reflects nature. Tao supplies the physical laws that provide ideal physical models of processes. Tao, in this sense, is both a process and the container and origin of process and the laws of process. Tao is the natural, internal way of the universe - of Heaven and Earth.

7.5.2 阴阳 (Yin and Yang)

The other key Taoist values are Yin and Yang which articulate the relative nature of all standards. Laozi claims that, in both society and Nature, there are a large number of contradictions. He presents a series of contradictory concepts: big and small, high and low, front and back, life and death, difficult and easy, start and finish, positive and negative, wise and foolish, good and bad, strong and weak, being and non-being, and so on. Laozi not only notices these contradictions, but also notices that contradictions are by no means isolated; the two parts of a contradiction are in a unity of opposites, and they are always interrelated and interdependent. The explanation in detail is as follows: “When all the people in the world know the reason why beautiful is beautiful, they know what the ugly is. When all the people in the world know the reason why the good is good, they know what the bad is. Therefore, being and nonbeing, difficult and easy, long and short, high and low, front and back are all mutually opposite and interdependent. This is an eternal truth.” (Laozi, Chapter 2)

Laozi figures out that the factors in any contradiction are both opposite and complementary to each other. That is to say, each side takes the opposite from the premise of its own existence, but they are in one and the same unity. In one word simply, contrary things possess identity. Without any “concession” there can be no “integrity” at all. Without any “compromise” there is no “general interest” whatever. Without “depression” there is no “fulfilment”, and so on. In these pairs each presupposes the existence of the other.

Laozi abstracts the nature of all these contradictions by invoking the polar concepts of yin and yang. Yin is the abstract of the negative attribute of the contradictions such as small, weak, bad, passive, downward and so on, whereas yang is the positive attribute such as big, strong, good, active, upward and so on. Yin and yang become more clearly described when
we look at them relative to concrete things on diffident levels. We can therefore speak of
earth/heaven as yin/yang, woman/man as yin/yang, death/life as yin/yang and so on. Ying and
yang explain the rhythmic processes that constitute the natural world, as stated in I Ching
“With yin and yang that makes the Tao”. Yin does not transcend yang, nor vice versa; rather,
yin entails yang, and yang entails yin. “The myriad things carry the yin and embrace the yang,
and through the blending of the material force they achieve harmony” (Laozi, Chapter 42).

There are four principles governing yin/yang distinctions (Cheng, 1986). First, the
principle of universality. In all the things in the universe there exist contradictions of yin and
yang. All the things that exist objectively have their own process of development lying in the
internal contradictory nature of the things per se, while at the same time each and every thing
is itself a unity of opposites (Xiao and Li, 2008). Indeed, all the related things or inner one
thing can be abstracted by yin and yang, such as Heaven and Earth, in and out, long and short.
Second, the principle of relationality. The things or phenomena which are analysed by yin
and yang should be in the same category or level based on relativity. Only a pair of related
things, or two sides in one thing, which form a pair of contradictions can be associated with
and explained by yin/yang. Third, the principle of opposite complementarity. Yin and yang
are opposite to, dependent on and complement each other. The contradictions of yin and yang
are not constant but transform to each other within certain circumstances. Fourth, the
principle of relativity. The attributes of yin/yang of a certain thing are not absolute but
relative. They will change when the category of the contradictions are changed. A thing can
be yin from one perspective but yang from another perspective.

7.5.3 无为 Wu Wei

Wu Wei is easy to misunderstand if it is interpreted literally. Since wu means “not” and
wei means “action”, wu wei is then translated as “inaction”. The meaning of “wu wei” is quite
different from “inaction” or “do nothing”, however. According to Majka (2000), wu wei is
the process of understanding the nature of circumstances, and acting in accordance with this.
Although “Tao invariably takes no action (wu wei), and yet there is nothing left undone”, Tao
is invariably action-in-itself. To say “Tao wu wei” is tantamount to saying that Tao acts in
accordance with its own nature. Since Tao is action-in-itself, it certainly requires no
additional action to act. “Knowledge accumulates gradually by learning, impact decreases
gradually by practising the Tao. Wu wei is achieved when the impact decreases to none.
Without acting wilfully then everything acts in accordance with its own nature” (Laozi, Chapter 48).

Not only is *wu wei* not non-action, it is indeed well-planned and deliberative action. The statements, “He who takes an action fails” and “the sage takes no action and therefore does not fail” are consistently interpreted as “he who takes action in violation of the laws of nature fails” and “the sage acts in accordance with the laws of nature and therefore does not fail”. The sage, being the ideal Taoist man, understands the Tao well and is thus capable of not acting against nature. The real meaning of *wu wei* is therefore no action in violation of the natural laws, and taking action but without bias (Laozi, Chapter 64). Taoism advocates “Govern by doing nothing that goes against Nature”, which is in fact a demand that the imperial court and officials should not interfere with the daily life of common people by strict administration. This way, the common people may lead a normal life as Nature takes its course, and the society will become stable, and the destroyed economy restored. Such “*wu wei* (inaction)” is in fact “positive activity”.

The essence of *wu wei* is embodied in three aspects: “not scrambling for it”, “desire control”, and “moderate”. “Not scrambling for it” is a virtue that is praised highly in Taoism, and indicates the requirements of modesty. “The man with super goodness positions himself at the place where others dislike, broadens his mind, treats others with sincerity, love and selflessness, talks in accordance with trustworthiness, makes good use of fortes, and acts at the right time. The man with super goodness has no fault because of the virtue of “not scrambling for it” (Laozi, Chapter 8). The man who practises the principle of *wu wei* does not praise himself, but can be outstanding; is not opinionated, but can present righteousness; does not show off, but credits himself. The man with super goodness does not scramble for it and thus there is nobody can contest with him (Laozi, Chapter 22). “It” here can refer to lots of things, for example profit: the man who does not scramble for excessive profit can gain profit.

Taoism emphasises “desiring control”, which is an important component of *wu wei*. Laozi argues that too much desire will lead to misconduct. He criticises the striving for wealth, honour, gain and ambition. He encourages humans to satisfy their basic needs without the pursuit of excessive pleasure, and to live in a peaceful and content way of life by rejecting the temptation of material desire. Discontent is the biggest scourge and greed is the biggest fault (Laozi, Chapter 46). The “moderation” encouraged in Taoism is similar to the Doctrine
of the Mean in Confucianism. Laozi claims that “He who is contented with his possessions will not be disgraced by others for it; he who knows to stop before going too far will not be in trouble; thus he can be constant safe and sound” (Laozi, Chapter 44). According to the transformation of $yin$ and $yang$, it changes to be weak when it is too strong. Therefore, moderation is the best situation.

7.6 Conclusion

Taoism is another important component of Chinese culture that has had significant influences on Chinese people. Taoism in this study refers to the Taoist School/Philosophy, excluding the religious elements and other cultural compositions (architecture, medicine, music, etc.). Taoism is integrated with the Taoist school, addressing Lao Zi as the founder and the book of Laozi (Tao Te Ching) as the classic work, and believing in the Tao (the way). Tao, $yin$ and $yang$, and $wu$ $wei$ are extracted as the three values of Taoism. Tao is the most primitive form of existence and the primary noumenon of spirit that gives birth to and fosters all things. Tao is also described as a process of change and transformation while “reversion is the action of Tao”. The dominating function of Tao is just to let all things follow their own course, and it does nothing itself. That is to say, Tao is only a functioning law that exists universally and obeys Nature.

There are a large number of contradictions in both society and Nature. $Yin$ is the abstract of the negative attribute of these contradictions while $yang$ stands for the positive. $Yin$ does not transcend $yang$, nor vice versa; rather, $yin$ entails $yang$, and $yang$ entails $yin$. There are five principles governing $yin/yang$ distinctions: university, relationality, opposite complementarity, relativity and creativity. The meaning of $wu$ $wei$ is no action in violation of the natural laws. The essence of $wu$ $wei$ is embodied in three aspects: “not scrambling for it”, “desiring control”, and “moderation”.

The aim of the synthesis of Taoist values is to translate them into the context of sustainable tourism. By comparing and contrasting with the principles of sustainable tourism created based on Western values, these principles will be modified based on Taoist values. This will be attempted in Chapter Nine. The next chapter is going to interrogate the literature on sustainable tourism to discuss its definition, development and debates and abstract its principles.
Chapter 8 The Concept of Sustainable Tourism

8.1 Introduction

Sustainable tourism has been considered to be an alternative paradigm that will benefit future tourism development (Sharpley, 2000), although is a lot of debate as to its rationale and effectiveness (Cater, 1993; Hedren and Linner, 2009). There seems to be a dilemma in respect to research on sustainable tourism in terms of defining and practically applying the concept. Bramwell and Lane (2014) advocate that sustainable tourism research needs to adopt the approaches and concerns associated with the “critical turn”. As discussed in Chapter One, this study contributes to the “critical turn” of tourism studies both from the “methodological turn” and “cultural turn” aspects. As for sustainable tourism, in response to the “methodological turn”, the conceptual research approaches which are generated in Chapter Three are adopted; in response to the “cultural turn”, Chinese cultural values are translated to the interpretations of sustainable tourism.

This chapter adopts the conceptual research approaches to carry out the discussion. Four of the twelve themes are selected. Theme three, Historical analysis of concepts, explores the concept of sustainable tourism with regards to how it is originated and evolved based on its parental concepts: development and sustainable development. Theme one, Defining concepts, critically discusses and evaluates different definitions of sustainable tourism, the range of sustainable tourism with regards to the relationship and differences between sustainable tourism and sustainable tourism development. Theme seven, Deconstructing concepts, indicates the cultural and philosophical bias in the interpretations of the concept of sustainable tourism. Theme nine, Synthesising concepts, summarises the principles of sustainable tourism, based on the relevant literature, in order to compare these with the Chinese cultural values. Finally, conclusions are drawn to summarise the above issues and direct the content to the next chapter.

8.2 The content analysis of Sustainable Tourism

This section further explains the content analysis of sustainable tourism in order to make clear how the findings of this chapter are underpinned, as distinct from the general illustration in Chapter Four. Using the books and journals that are relevant to sustainable tourism as the source of data and purposive sampling as the sampling method, 80 pieces of conceptual research on sustainable tourism are selected. According to Table 8.1, there are 56 journal
articles and 24 books. 59 of these are typical cases, 18 are critical cases and three are both typical cases and critical cases due to the features of different chapters of these books. The table also indicates other details of the literature including the authors, whether they are books or journal articles, the year published, the conceptual research approaches used, and the main points made in the studies. This section, however, focuses on the contribution of the literature to the findings in respect to sustainable tourism.

With the adoption of four of the twelve conceptual research approaches, as discussed in section 4.4.5, the notes taken during the reading and re-reading centre on the historical development, definition, deconstruction and principles of sustainable tourism. Then the notes are organised, analysed, refined and categorised into sub-units. The selected works range from 1987 to 2014 so that the development of the understanding of sustainable tourism can be traced. The historical analysis is divided into sub-units of the concept of development, sustainable development and sustainable tourism, due to their close relationship. This is also indicated by the literature selected, such as the book *Managing Sustainable Development* by Carley and Christie (2000), which is a work on sustainable development. The notes referring to the definition of sustainable tourism demonstrate the various understandings of the concept including broad definitions, narrow definitions and case-by-case definitions. Following analysis and criticism of these definitions, this study adopts none of them but reconceptualises the concept in the light of Confucianism and Taoism. The notes referring to deconstruction offer a critique of epistemological and cultural bias in respect to knowledge of sustainable tourism and direct the reader to the production of alternative ones, especially Chinese ones in the context of this study. The notes referring to the principles of sustainable tourism lead the concept to items that can be compared, contrasted and combined with Confucian and Taoist values. The reconceptualisation is carried out based on these analyses and discussions.
<table>
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<th>Author(s)</th>
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<th>Conceptual Research Approaches Used</th>
<th>Main Points</th>
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<td>Book</td>
<td>Tourism and climate change: Risks and opportunities</td>
<td>2007</td>
<td>Three, five</td>
<td>Discuss the relationship of tourism and climate change as well as provide suggestions for practitioners and policy makers</td>
<td>TC</td>
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<td>Berry, S. and Ladkin, A.</td>
<td>Journal article</td>
<td>Sustainable tourism: a regional perspective</td>
<td>1997</td>
<td>eight</td>
<td>Present how small businesses understand and practise sustainable tourism</td>
<td>TC</td>
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<td>Book</td>
<td>Sustainable tourism management: principles and practice</td>
<td>1996</td>
<td>One, two, three, five, eight</td>
<td>Refer to several issues relating to the understanding of the concept of sustainable tourism and its practice</td>
<td>TC</td>
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<td>Bramwell, B. &amp; Lane, B.</td>
<td>Journal article</td>
<td>The “critical turn” and its implications for sustainable tourism research</td>
<td>2014</td>
<td>eleven</td>
<td>Sustainable tourism research should adopt the ideas and approaches promoted by the “critical turn”</td>
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<tr>
<td>Bramwell, B. &amp; Lane, B.</td>
<td>Journal article</td>
<td>Sustainable tourism: an evolving global approach</td>
<td>1993</td>
<td>three</td>
<td>Review the origin and development of sustainable tourism as well as the relevant issues</td>
<td>TC</td>
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<tr>
<td>Briassoulis, H.</td>
<td>Journal article</td>
<td>Sustainable tourism and the question of the commons</td>
<td>2002</td>
<td>One, ten</td>
<td>Discuss the role of common resources play in sustainable tourism</td>
<td>TC</td>
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<td>Brundtland, G.H</td>
<td>Book</td>
<td>Our common future</td>
<td>1987</td>
<td>Three, six</td>
<td>Discuss the common challenges and recommendations for sustainable tourism</td>
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<tr>
<td>Butler, R.</td>
<td>Journal article</td>
<td>Sustainable tourism: a state-of-the-art review</td>
<td>1999</td>
<td>One, three</td>
<td>Review the debates on the definitions of sustainable tourism and distinguish from the principles of sustainable development</td>
<td>TC</td>
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<tr>
<td>Author(s)</td>
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<td>Byrd, E. T.</td>
<td>Journal article</td>
<td>Stakeholders in sustainable tourism development and their roles: applying stakeholder theory to sustainable tourism development</td>
<td>2007</td>
<td>One, eight, ten</td>
<td>Discuss the role stakeholders play in sustainable tourism in terms of identification, classification, responsibility and practice</td>
<td></td>
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<tr>
<td>Carley, M. &amp; Christie, I.</td>
<td>Book</td>
<td>Managing sustainable development</td>
<td>2000</td>
<td>Seven</td>
<td>Deconstruct the concept of sustainable development in terms of relying too much on Western values</td>
<td></td>
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<tr>
<td>Carvalho, G.</td>
<td>Journal article</td>
<td>Sustainable development: is it achievable within the existing international political economy context?</td>
<td>2004</td>
<td>Three, eight</td>
<td>Argue that it is impossible to achieve sustainable development within the existing international political economy context</td>
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<tr>
<td>Cater, E.</td>
<td>Journal article</td>
<td>Environmental contradictions in sustainable tourism</td>
<td>1995</td>
<td>Five</td>
<td>The application of principles of sustainable development to tourism is problematic especially environmental contradictions</td>
<td></td>
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<tr>
<td>Cernat, L. &amp; Gourdon, J.</td>
<td>Journal article</td>
<td>Is the concept of sustainable tourism sustainable?</td>
<td>2007</td>
<td>Eight</td>
<td>Various approaches are adopted by sustainable tourism due to the ambiguity of the concept; proposed a methodological framework as benchmarks to assess tourism sustainability</td>
<td></td>
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<tr>
<td>Clarke, J.</td>
<td>Journal article</td>
<td>A framework of approaches to sustainable tourism</td>
<td>1997</td>
<td>Three</td>
<td>Review and propose a framework of approaches (four positions of understanding) to sustainable tourism</td>
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<td>Author(s)</td>
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<td>Cohen, E.</td>
<td>Journal article</td>
<td>Authenticity, equity and sustainability in tourism</td>
<td>2002</td>
<td>eight, eleven</td>
<td>The relationship between authenticity and equity and sustainable tourism should be considered</td>
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<td>Cole, S.</td>
<td>Journal article</td>
<td>Information and empowerment: the keys to achieving sustainable tourism</td>
<td>2006</td>
<td>Eight, eleven</td>
<td>Indicate the socio-cultural issues have been marginalised in sustainable tourism and emphasise on the empowerment and participation of local community</td>
<td>TC</td>
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<tr>
<td>Craik, J.</td>
<td>Journal article</td>
<td>Are there cultural limits to tourism?</td>
<td>1995</td>
<td>five, eight</td>
<td>Cultural issues should be addressed in the debate about sustainable tourism</td>
<td>CC</td>
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<tr>
<td>Daly, H.E.</td>
<td>Journal article</td>
<td>Toward some operational principles of sustainable development</td>
<td>1990</td>
<td>eight</td>
<td>Explore two principles of sustainable development for the management of resources</td>
<td>TC</td>
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<tr>
<td>Dymond, S.</td>
<td>Journal article</td>
<td>Indicators of sustainable tourism in New Zealand: a local government perspective</td>
<td>1997</td>
<td>eight</td>
<td>Examine the application of the concept of sustainable tourism in practice and the attitude of local government towards it</td>
<td>TC</td>
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<tr>
<td>Eber, S.</td>
<td>Book</td>
<td>Beyond the green horizon: principles for sustainable tourism</td>
<td>1992</td>
<td>Three, four</td>
<td>Discuss the relationship between tourism, environment and development; develop principles of sustainable tourism</td>
<td>TC</td>
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<tr>
<td>Eagles, P. F., McCool, S. F., &amp; Haynes, C. D.</td>
<td>Book</td>
<td>Sustainable tourism in protected area: guidelines for planning and management</td>
<td>2002</td>
<td>One, eight</td>
<td>Focus on the planning and management of protected area may refer to application of sustainable tourism</td>
<td>TC</td>
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<tr>
<td>Farrell, B. &amp; Twining-Ward, L.</td>
<td>Journal article</td>
<td>Reconceptualising tourism</td>
<td>2004</td>
<td>Eight, twelve</td>
<td>Reconceptualise tourism with regards to new interpretations of sustainability</td>
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<td>Author(s)</td>
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<td>Farrell, B. &amp; Twining-Ward, L.</td>
<td>Journal article</td>
<td>Seven steps towards sustainability: tourism in the context of new knowledge</td>
<td>2005</td>
<td>Three, eleven</td>
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<td>Review the seven steps of the process of the understanding of sustainable tourism from the knowledge perspective</td>
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<td>Font, X. &amp; Harris, C.</td>
<td>Journal article</td>
<td>Rethinking standards from green to sustainable</td>
<td>2004</td>
<td>eight</td>
<td></td>
<td>The social standards are not clear for sustainable tourism and need to be investigated and clarified</td>
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<tr>
<td>Garrod, B. &amp; Fyall, A.</td>
<td>Journal article</td>
<td>Beyond the rhetoric of sustainable tourism?</td>
<td>1998</td>
<td>One, eight, nine</td>
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<td>The study of sustainable tourism should move from defining to how to practise</td>
</tr>
<tr>
<td>Giampietro, M.</td>
<td>Journal article</td>
<td>Using hierarchy theory to explore the concept of sustainable development</td>
<td>1994</td>
<td>seven</td>
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<td>Explore sustainable development using the principles of hierarchy theory</td>
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<tr>
<td>Giddings, B., Hopwood, B. &amp; O’Brien, G.</td>
<td>Journal article</td>
<td>Environment, economy and society: fitting them together into sustainable development</td>
<td>2002</td>
<td>Five, seven</td>
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<td>Sustainable development is a contested concept depending on philosophies and cultural values and thus should include environment, economy and society</td>
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<tr>
<td>Gossling, S.</td>
<td>Journal article</td>
<td>Sustainable tourism development in developing countries: some aspects of energy use</td>
<td>2000</td>
<td>eight</td>
<td></td>
<td>Explore the energy use of sustainable tourism in developing countries</td>
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<tr>
<td>Hardy, A. &amp; Beeton, R.</td>
<td>Journal article</td>
<td>Sustainable tourism or maintainable tourism: managing resources for more than average outcomes</td>
<td>2001</td>
<td>Two, three, eight</td>
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<td>Compare the concept of sustainable tourism with maintainable tourism and address the understanding of stakeholder perceptions in implementing sustainable tourism</td>
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<td>Hardy, A., Beeton, R. &amp; Pearson, L.</td>
<td>Journal article</td>
<td>Sustainable tourism: an overview of the concept and its position in relation to conceptualisations of tourism</td>
<td>2002</td>
<td>One, three</td>
<td>Critically review the origins, development, uses and arguments of sustainable tourism, and then relate it to conceptualisations of tourism</td>
<td>TC</td>
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<td>Hedren, J. &amp; Linner, B.</td>
<td>Journal article</td>
<td>Utopian thought and the politics of sustainable development</td>
<td>2009</td>
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<td>Link the concept of sustainable development with three elements of utopian thought</td>
<td>TC</td>
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<td>Holden, A.</td>
<td>Book</td>
<td>Environment and Tourism</td>
<td>2000</td>
<td>Four, five, eight</td>
<td>Proudly discuss the relationship between tourism and environment</td>
<td>TC</td>
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<td>Holden, A.</td>
<td>Journal article</td>
<td>In need of new environmental ethics for tourism?</td>
<td>2003</td>
<td>One, eight, eleven</td>
<td>Explore the environmental ethics which the tourism stakeholders believe in and encourage non-anthropocentric environmental ethic</td>
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<td>Holden, A.</td>
<td>Book</td>
<td>Tourism Studies and the Social Science</td>
<td>2006</td>
<td>One, three, four, five</td>
<td>Discuss tourism within the social science, the development of tourism research</td>
<td>TC</td>
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<td>Hopwood, B., Mellor, M. &amp; O’Brien, G.</td>
<td>Journal article</td>
<td>Sustainable development: mapping different approaches</td>
<td>2005</td>
<td>One, five</td>
<td>Classify different thoughts on sustainable development, trends and changes</td>
<td>TC</td>
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<tr>
<td>Hoyer, K.</td>
<td>Journal article</td>
<td>Sustainable tourism or sustainable mobility?</td>
<td>2000</td>
<td>Eight, ten</td>
<td>Sustainable mobility should be included in the study of sustainable tourism</td>
<td>CC</td>
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<tr>
<td>Hughes, G.</td>
<td>Journal article</td>
<td>The cultural construction of sustainable tourism</td>
<td>1995</td>
<td>seven, eleven</td>
<td>Sustainable tourism is dominated by technical and scientific approaches while overlooking the ethical issues relating to culture</td>
<td>CC</td>
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<tr>
<td>Hunter, C.</td>
<td>Journal article</td>
<td>On the need to re-conceptualise sustainable tourism development</td>
<td>1995</td>
<td>nine, twelve</td>
<td>The dominant paradigm of sustainable tourism is too tourism-centric and should be re-conceptualised with regards to</td>
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<tr>
<td>Author(s)</td>
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<td>Hunter, C.</td>
<td>Journal article</td>
<td>Sustainable tourism as an adaptive paradigm</td>
<td>1997</td>
<td>Seven, twelve</td>
<td>Sustainable tourism should be an adaptive paradigm with different interpretations under different circumstances</td>
<td></td>
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<tr>
<td>Inskeep, E</td>
<td>Book</td>
<td>Tourism planning: an integrated and sustainable development approach</td>
<td>1991</td>
<td>One, eight</td>
<td>Present the important role as an integrated and sustainable development approach that tourism planning should play in sustainable tourism.</td>
<td></td>
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<tr>
<td>Kates, R., Parris, T. &amp; Leiserowitz, A.</td>
<td>Journal article</td>
<td>What is sustainable development?</td>
<td>2006</td>
<td>One, three</td>
<td>Define sustainable development in terms of goals, indicators, values and practice and how it relates to sustainable tourism.</td>
<td></td>
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<tr>
<td>Ko. T.</td>
<td>Journal article</td>
<td>Development of a tourism sustainability assessment procedure: a conceptual approach</td>
<td>2004</td>
<td>Three, eight</td>
<td>Develop a conceptual framework to assess tourism sustainability with six components that is relevant and useful.</td>
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<tr>
<td>Laine, M.</td>
<td>Journal article</td>
<td>Meaning of the term ‘sustainable development’ in Finnish corporate disclosures</td>
<td>2005</td>
<td>One, three, eight</td>
<td>Explore the meaning of ‘sustainable development’ for companies and business and how it relates to sustainable tourism.</td>
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<tr>
<td>Lele, S.</td>
<td>Journal article</td>
<td>Sustainable development: a critical review</td>
<td>1991</td>
<td>Three, eleven</td>
<td>Critically review the concept of sustainable development and its weaknesses that is relevant and useful.</td>
<td></td>
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<tr>
<td>Lew, A.A; Hall, C.M</td>
<td>Book</td>
<td>Sustainable tourism: a geographical perspective</td>
<td>1998</td>
<td>One, two, three, eight</td>
<td>Examine the origin, development, definition, use and debates on sustainable tourism addressing the geographical issues that is relevant and useful.</td>
<td></td>
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<tr>
<td>Liu, Z.</td>
<td>Journal article</td>
<td>Sustainable tourism development: a critique</td>
<td>2003</td>
<td>One, eleven</td>
<td>Criticise six issues overlooked in sustainable tourism and advocate systems perspective and interdisciplinary approach that is relevant and useful.</td>
<td></td>
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<tr>
<td>Logar, I.</td>
<td>Journal article</td>
<td>Sustainable tourism management in Crikvenica, Croatia: An assessment of policy instruments</td>
<td>2010</td>
<td>One, four, six, eight</td>
<td>Identify the negative impacts of tourism and develop indicators to measure them in order to achieve sustainable tourism</td>
<td>TC</td>
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<tr>
<td>Lozano-Oyola, M., Blancas, F. J., González, M. and Caballero, R.</td>
<td>Journal article</td>
<td>Sustainable tourism indicators as planning tools in cultural destinations</td>
<td>2012</td>
<td>One, four, eight</td>
<td>Discuss the indicators to measure sustainable tourism and its weakness; develop an indicator system to evaluate sustainable tourism especially for cultural destinations</td>
<td>TC</td>
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<td>Luke, T.</td>
<td>Journal article</td>
<td>Neither sustainable nor development: reconsidering sustainability in development</td>
<td>2005</td>
<td>Seven</td>
<td>Criticise sustainable development as an ideological construct which is neither sustainable nor development</td>
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<td>McKercher, B</td>
<td>Journal article</td>
<td>Can tourism survive “sustainability”?</td>
<td>1993</td>
<td>five</td>
<td>Sustainable tourism has to take the role of non-tourism entities</td>
<td>CC</td>
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<td>McMinn, S.</td>
<td>Journal article</td>
<td>The challenge of sustainable tourism</td>
<td>1997</td>
<td>One, five</td>
<td>Discuss the debates on the definition and measurement of sustainable tourism</td>
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<td>Middleton, V. T., &amp; Hawkins, R.</td>
<td>Book</td>
<td>Sustainable tourism: a marketing perspective</td>
<td>1998</td>
<td>One, three, eight</td>
<td>Discuss the concept of sustainable tourism and how it is adopted in marketing</td>
<td>TC</td>
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<td>Miller, G.</td>
<td>Journal article</td>
<td>The development of indicators for sustainable tourism: results of a Delphi survey of tourism researchers</td>
<td>2001</td>
<td>eight</td>
<td>Present the disagreement over the meaning and border of the concept of sustainable tourism and develop the indicators for tourists to select sustainable form of tourism</td>
<td>TC</td>
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<td>Miller, G., Rathouse, K., Scarles, C., Holmes, K. &amp; Tribe, J.</td>
<td>Journal article</td>
<td>Public understanding of sustainable tourism</td>
<td>2010</td>
<td>eight</td>
<td>Present the low awareness and understanding of the public of sustainable tourism and resistant to take actions towards it</td>
<td>TC</td>
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<td>Mitcham, C.</td>
<td>Journal article</td>
<td>The concept of sustainable development: its origins and ambivalence</td>
<td>1995</td>
<td>Two, three</td>
<td>Review the historical and philosophical origins of sustainable development; and critical issues in its adoption</td>
<td></td>
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<td>Mowforth, M; Munt, I</td>
<td>Book</td>
<td>Tourism and sustainability: development, globalisation and new tourism in the Third World</td>
<td>2008</td>
<td>One, three, eight</td>
<td>Critically discuss the relationship between sustainable tourism, development and globalisation especially the situations in the developing countries</td>
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<tr>
<td>Muller, H.</td>
<td>Journal article</td>
<td>The thorny path to sustainable tourism development</td>
<td>1994</td>
<td>One, nine</td>
<td>Discuss the meaning of sustainable tourism and the reasons of its difficulty in application</td>
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<td>Neto, F.</td>
<td>Journal article</td>
<td>A new approach to sustainable tourism development</td>
<td>2003</td>
<td>Three, ten</td>
<td>Sustainable tourism should adopt new approaches to include pro-poor and community participation</td>
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<td>Page, S; Connell, J</td>
<td>Book</td>
<td>Sustainable Tourism: critical concepts in the social sciences</td>
<td>2004</td>
<td>One, two, three</td>
<td>Systematically review the origin, definition, development, current use and debates on the concept of sustainable tourism</td>
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<tr>
<td>Redclift, M. R.</td>
<td>Book</td>
<td>Sustainable Development: Exploring the Contradictions</td>
<td>2002</td>
<td>One, three, five</td>
<td>Explore the contradictions among political, economic and environmental issues in sustainable development</td>
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<td>Redclift, M. R.</td>
<td>Journal article</td>
<td>Sustainable development (1987–2005): an oxymoron comes of age</td>
<td>2009</td>
<td>One, three</td>
<td>Review and evaluate the definitions of sustainable development and then focus on global environmental justice</td>
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<td>Authors</td>
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<td>Rigall-I-Torrent, R.</td>
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<td>Sustainable development in tourism municipalities: the role of public goods</td>
<td>2008</td>
<td>Four</td>
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<td>Explore the role of public goods play in sustainable tourism</td>
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<td>Ritchie, J. B., &amp; Crouch, G. I.</td>
<td>Book</td>
<td>The Competitive Destination: A Sustainable Tourism Perspective</td>
<td>2003</td>
<td>Three</td>
<td>four, eight</td>
<td>Analyse the factors which affect destination competitiveness and how to make it sustainable</td>
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<td>Robinson, J.</td>
<td>Journal</td>
<td>Squaring the circle? Some thoughts on the idea of sustainable development</td>
<td>2004</td>
<td>One</td>
<td>three, seven</td>
<td>Criticise the concept of sustainable development to be vague, attracts hypocrites and fosters delusions</td>
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<td>Robinson, M.</td>
<td>Journal</td>
<td>Collaboration and cultural consent: refocusing sustainable tourism</td>
<td>1999</td>
<td>Eight</td>
<td>eleven</td>
<td>Emphasise the cultural basis in understanding sustainable tourism and encourage collaboration and cultural considerations in tourism development</td>
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<td>Ryan, C</td>
<td>Journal</td>
<td>Equity, management, power sharing and sustainability —issues of the 'new tourism'</td>
<td>2002</td>
<td>eight</td>
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<td>Explore the issues of equity, management, power sharing in the implementing of sustainable tourism</td>
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<td>Saarinen, J.</td>
<td>Journal</td>
<td>Traditions of sustainability in tourism studies</td>
<td>2006</td>
<td>Three</td>
<td>five, seven</td>
<td>Review the background and arguments of sustainable tourism with regards to the traditions of the limits of growth</td>
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<td>Selin, S.</td>
<td>Journal</td>
<td>Developing a typology of sustainable tourism partnerships</td>
<td>1999</td>
<td>Four</td>
<td>eleven</td>
<td>Explore the contributions of partnerships to sustainable tourism and develop a typology of them</td>
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<td>Sharpley, R.</td>
<td>Journal</td>
<td>Tourism and sustainable development: exploring the theoretical divide</td>
<td>2000</td>
<td>Two</td>
<td>three, five</td>
<td>There are theoretical differences between sustainable tourism and sustainable development so that it cannot be transferred to the context of tourism</td>
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<tr>
<td>Authors</td>
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<td>Sharpley, R.</td>
<td>Book</td>
<td>Tourism Development and the Environment: Beyond Sustainability?</td>
<td>2009</td>
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<td>Explore the role of tourism in development and its relationship with environment in terms of sustainability</td>
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<td>Discuss the relationship between tourism and development from both conceptual and practical level</td>
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<td>Journal article</td>
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<td>2005</td>
<td>Eight</td>
<td>To demonstrate the sustainability in mass tourism destination and the way of how to seek to it</td>
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<td>1997</td>
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<td>Present the debates on sustainability in tourism with regards to environmental, ethical and economic issues; discuss how to transfer the principles to practice</td>
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<td>Discuss the relationship between tourism and development, especially the situation in the developing world</td>
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<td>2005</td>
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<td>Suggest the partnerships and responsibilities of government, industry and other organisations in order to achieve sustainable tourism</td>
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8.3 Historical analysis of the concepts of sustainable tourism (theme three)

Historical analysis of the concepts)

Sustainable tourism has been a concept studied and discussed for decades. To understand sustainable tourism profoundly and comprehensively, it is necessary to review its origins, development and evolution. Thus, theme three is adopted. Since sustainable tourism originates from its root concepts which are easily identified as “development” and “sustainable development”, the historical analysis is divided into three aspects.

8.3.1 Historical analysis of the concept of development

The term “sustainable development” is composed of the two sub terms of “development” and “sustainability”. The exploration of “sustainable development” may therefore be undertaken by assessing its constituent parts separately (Lélé, 1991). This suggests drawing on development theory. The term “development” has been used in a variety of different contexts (Holden, 2006). Referring to the question of what is development, the understanding and interpretation of the term has evolved according to changes in human cognition. The term was traditionally defined based on the economic growth of Western-style modernisation (Rostow, 1960; Redclift, 1992). In this circumstance, development was considered to be synonymous with economic growth. The term needed to be redefined more broadly due to the failure of economic growth policies in solving social and political problems (Woolcock, 1998).

The study of development originated during the post-Second World War period when the political and economic climate changed rapidly (Holden, 2006). The main ideas of development evolved chronologically from modernisation, dependency, economic neoliberalisation, and then alternative or sustainable development. The first development paradigm of modernisation is the theoretical foundation. According to Rostow (1960), economic growth is the core precondition of the modernisation paradigm since it enables mass consumption. During the late 1960s and 1970s, dependency theory became the paradigm which dominated the theories of development (Sharpley, 2000). This argued that, compared to developed countries, the developing countries have their own political, institutional and economic structures, both externally and internally, that can keep them in a dependent position. Following modernisation, economic neoliberalism emphasises privatisation and free markets and values ‘trickle-down growth’ by investing in major
construction projects and all classes and segments of society share the economic benefits (Holden, 2006). According to the alternative development paradigm, the preceding linear economic growth-based policies are broken, both chronologically and logically (Redclift, 1992). Instead, it is suggested that human and environmental concerns need to be embraced so as to develop a broader resource-based, ‘bottom-up’ approach.

### 8.3.2 Historical analysis of the concept of sustainable development

The term “sustainable development” was popularised around 1980 when the concept was utilised in the reports of the World Conservation Strategy (Reid, 1995). Given the responsibilities for the coming generations with regards to natural resources, conservation is equally important to development according to The International Union for the Conservation of Nature (IUCN) (IUCN, 1980). The distinction between "development" and "growth" was proposed based on the understanding that it is necessary to consider the environment in economic growth. Afterwards, the notion was revised to place the emphasis on making good use of natural resources to achieve sustainability (Repetto, 1986). Solow (1986) argues that since the current generation cannot know what needs and preference the next generations will have, the only thing we can do is to ensure that they have the same opportunities as we have. Under this circumstance, sustainable development is put forward.

The typical modern idea critiqued the notion that progress is without limits whilst the postmodern paradigm believes in limits to progress (Mitcham, 1995). This idea led to research sponsored by a group called the Club of Rome and resulted in a published book, *The Limits to Growth* (1972). This turned the attention from the past to the future, and resulted in a shift from “limits to growth” which stress what should not be done to “sustainable development” which emphasises what should and can be done (Mitcham, 1995). The work following the shift is the *World Conservation Strategy* (1980) which clarifies the concepts of “development” and “conservation” as well as the relationship between them. It has to be noted that needs do not equate to desires, and development should not take growth for granted. Human needs are essential for development but what kind of development is the best to satisfy those needs is a question.

The most famous work in the field of sustainable development may be attributed to *Our Common Future*, which resulted in the report of World Commission on Environment and Development (WCED) in 1987. This is also known as the Brundtland Report. The report
relates the issue of environmental protection to economic growth and development, and makes this idea the essence of sustainable development. It bridged the conflicting interests with an interpretation of sustainable development rejecting simply limits or development (Mitcham, 1995). As the environmental problems and socio-economic problems in terms of equality and poor modification have become commonly recognised, the concept of sustainable development, which is concerned with the future, became popularised (Hopwood, Mellor and O’Brien, 2005). It has been argued, however, that the precondition for sustainable development is a five to ten-fold increase in the global economy because environmental protection and conservation require economic investment to support them. This explains why sustainable tourism has experienced difficulties in its adoption and application (Robinson, 2004). The concept of sustainable development has been criticised as vague and as leading to delusions (Gibson, 1991).

8.3.3 Historical analysis of the concept of sustainable tourism

As mentioned in the previous section, sustainable tourism refers to the concept of sustainable development. According to Southgate and Sharples (2002), the idea of sustainable development has been accepted and adopted in almost all sectors of society. It is the moral responsibility for the tourism industry to develop to become “sustainable tourism”. First of all, tourism has become the main engine of development or in other words one of the most important contributors to economy growth in terms of the multiplier effect of tourism expenditure, foreign exchange and employment increase (Blomgren and Sørensen, 1998; Telfer, 2002). It has to be noted that both tourist destinations and generating regions can benefit from tourism economically (through employment in local tour operating organisations, transport operators and other services) (Sharples, 2009). Second, tourism is an industry that is highly dependent on the environment due its high level of consumption of natural resources compared to other activities. Therefore, it is crucial for tourism industry to maintain the quality of the environment in order to gain sustainable development (Holden, 2000).

As for tourism, maintaining the quality of recreational areas for hunting can be considered as one of the earliest examples of sustainable tourism activities hundreds of years ago (Butler, 1991). Even though these recreational reserves were very simple and cannot be deemed as sustainable tourism development in the sense that is meant nowadays, they are indeed an ancient form of it, since they entailed the conscious conservation of resources (Hardy, Beeton and Pearson, 2002). It was the Brundtland Commission’s report Our
Common Future in 1987 that firstly transferred the idea of sustainable development to the context of tourism (WCED, 1987). The role that tourism can play in the blueprint of sustainable development in terms of economic and social processes was widely discussed and recognised after the United Nations “Earth Summit” in 1992 (Berry and Ladkin, 1997).

In fact, the natural, economic and socio-cultural impacts of tourism on the environment were recognised early in the 1980s (Belisle and Hoy, 1980; Milman and Pizam, 1988) and continued to be discussed in the 1990s (Lankford and Howard, 1994) and after 2000 (Sharpley, 2009). Compared to the positive impacts, the negative ones attracted more attention among tourism scholars (Goodall and Stabler, 1998), for example the damage to the ecosystem due to tourism activities (Holden, 2000), the greenhouse gases produced by transport (Becken and Hay, 2007), the destruction of the authenticity of local culture (Muller, 1994; Blomgren and Sørensen, 1998) and the disruption of local social orders (Hunter, 1997). Sharpley (2009) argues that the positive impacts of tourism are sometimes overestimated while the negative ones are underestimated. The negative impacts of tourism can be categorised into three aspects: superfluous consumption of resources, pollution and behavioural considerations (Holden, 2000).

The recognition of the possible negative impacts of tourism directs tourism scholars to research the reasons for these impacts, as well as ways to minimise them. According to Blomgren and Sørensen (1998), the undesired possible impacts may hinder sustainable development in general and even destroy the very tourism potential of the area or, in other words, the sustainability of tourism. The reason why tourism has a negative impact is because of the disadvantages of the form of mass tourism, which attaches too much importance to short-term economic benefits, overlooking the negative impacts on the environment and host communities caused by immoderate tourists (Mowforth and Munt, 2003). Sustainable tourism was therefore proposed as an alternative paradigm to mass tourism in order to reduce the negative impacts (on both physical environments and the social-culture of the host regions) to an acceptable level (Bramwell and Lane, 1993; Hall and Lew, 1998). The reason why sustainable tourism is proposed is linked to the willingness to balance the positive and negative impacts that may be caused by tourism.
During the late 1990s and after 2000, the concerns of sustainable tourism centred on the debates on the interpretations of, and the proper way to apply, sustainable tourism. Although sustainable tourism was commonly agreed to be a new paradigm of tourism development (Muller, 1994), there are various understandings of the concept in terms of definition, scope, principles and application (Simpson, 2001). As a result, the implementation of sustainable tourism has not been successful (Butler, 1998). Sustainable tourism tended out to be a rhetoric for marketing purposes while it was not followed through in practice (Jackson and Morpeth, 1999). Few visitor attractions achieve the main goals of sustainable tourism which are to be simultaneously economically productive, socially responsible and environmentally conscious. First of all, the unsuccessful implementation of sustainable tourism may be attributed to ambiguity over the meaning of the concept. In contrast to other concepts, there is no commonly agreed definition of sustainable tourism. The definitions can be categorised into three types: ones from a sustainable development perspective, which view tourism as a sector of general sustainable development; ones from the tourism perspective which centre on the sustainability of the tourism industry; and ones from an individual case perspective which advocate multiple definitions. The details will be presented in the next section.

Second, the complexity of the tourism industry enhances the difficulty in applying sustainable tourism. Since tourism activities refer to the environment, economy and social-culture, the practice of sustainable tourism incorporates ecological sustainability, economic sustainability and socio-cultural sustainability (Holden, 2006). In this context, it is difficult for tourism operators to balance and compromise the interests within sustainable tourism (Hall and Lew, 1998). Third, the implementation of sustainable tourism is not successful due to the poor collaboration between stakeholders (Goodwin, 2000; Carlsen et al., 2001). Sustainable tourism cannot be achieved without the stakeholders’ acceptance of the concept and participation in practice (Hall, 1999). Overlooking certain stakeholders, such as host communities, will result in the failure to achieve sustainable tourism (Mowforth and Munt, 2003). The interests of, and collaboration between, all stakeholders should therefore be incorporated in the conceptualisation of sustainable tourism.

In addition, the lack of implementation skills has been blamed for the problems with sustainable tourism practice (Telfer and Sharpley, 2008). The variable nature of the definitions indicates that multiple conceptual approaches to sustainable tourism are required rather than a single coherent one (Robinson, 2004). Ko (2004) critiques the descriptive
research on sustainability for relying on qualitative data only and developed a conceptual framework for sustainable tourism involving several quantitative and qualitative indicators. Bramwell and Lane (2014) claim that sustainable tourism research should adopt critical and reflexive approaches in order to have a better understanding of the concept and its application.

In recent years, after 2000, tourism scholars tended to debate the definition and scope of sustainable tourism less to focus more on the application of sustainable tourism based on their own understandings. Special attention was paid to sustainable tourism in developing countries with regards to poverty alleviation, participatory planning and ethical issues (Carbone, 2005; Telfer and Sharpley, 2007; Mowforth and Munt, 2008). Some scholars concentrate on identifying the indicators that can measure sustainable tourism, including all aspects of sustainability, such as environmental issues, tourists’ satisfaction levels, financial leakages and so on; and also the development of different indicators for different types of tourist destinations (Miller and Twining-Ward, 2005; Schianetz and Kavanagh, 2008; Lozano-Oyola, Blancas and González, 2012). The other literature on sustainable tourism in recent years is either centred on one aspect, such as the roles different stakeholders play in sustainable tourism (Byrd, 2007), or specifically on single tourist destinations such as Crikvenica, Croatia (Logar, 2010).

8.4 Defining sustainable tourism (theme one Defining concepts)

This section reviews and evaluates the issues in defining sustainable tourism with the adoption of theme one of the conceptual research approaches. Due to the close relationship between sustainable tourism and sustainable development, it is inevitably necessary to discuss the definitions of sustainable development first.

The World Commission on Environment and Development (WCED, 1987) defines sustainable development as: “development that meets the needs of the present without compromising the ability of future generations to meet their own needs” (p.8). This definition implies a limitation imposed on the present generation with regards to the exploitation of environmental resources. It indicates that the aim of development is firstly to satisfy the needs of the present generation. Meanwhile, it explains that development is a process that lasts into the future. Meeting the needs of future generations is the requirement of “sustainable”. This definition has been criticised, however, as being too abstract so that some
key issues are overlooked (Holden, 2006). It does not imply how the requirement of meeting the needs of both the current and future generations can be realised, such as maintenance of the quality of the environment, or conservation of resources. As for the issues of intra- and inter-generational equity, it is argued that how could we know the needs of the future generations and make decisions for them (Turner et al., 1994). The definition by WCED has therefore been criticised for being too ambiguous, too conformist, too vague, and too mainstream (Robert, Parris and Leiserowitz, 1995; Hedren and Linner, 2009).

Sustainable development distinguishes between what it is sought to sustain and what it is sought to develop, as well as the relationship between the two (Robert, Parris and Leiserowitz, 1995). The early literature on sustainable development concentrated on economic development then shifted to human development and finally social development. The standard definition of sustainable development, which includes economic, social and environmental perspectives, has been widely used since the 2002 World Summit on Sustainable Development. Although the idea of sustainable development has been widely accepted by people from different cultures, sectors and industries, there is still no universally agreed definition of the concept. The definitions may be subject to political and ethical prejudice since they are produced by the dominant power and values (Pearce, 1993).

The same situation was encountered by tourism researchers in defining sustainable tourism. How to define sustainable tourism became a major challenge for tourism scholars (Saarinen, 2006). The World Tourism Organisation (WTO, 1995) says that sustainable tourism “meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future.” This definition adopts the concept of sustainable development defined by the WCED (1987) and translates it to the context of tourism. It indicates that the prime purpose of sustainable tourism is to meet the needs of current and future tourists and host regions. A remarkable improvement is that it equates the rights of host communities to those of tourists. Unlike the ambiguity of the WCED’s definition of sustainable development, WTO updated the definition in 2004 to be “tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities” (WTO, 2004). It thereby stressed the participation of all relevant stakeholders, as well as the requirement of benefit for all these stakeholders. It also highlights the requirement of sustainable tourism to manage the three aspects of tourism’s impacts.
Sustainable tourism has been defined as “tourism which is economically viable but does not destroy the resources on which the future of tourism will depend, notably the physical environment and the social fabric of the host community” (Swarbrooke, 1999, p.13). This definition concentrates on the sustainability of the tourism industry in terms of its needs (the consumption of resources) and requirements (the maintenance of the quality of the environment, economy, culture and society). Butler (1998) defines sustainable tourism as “tourism which is developed and maintained in an area in such a manner and at such a scale that it remains viable over an indefinite period and does not degrade or alter the environment (human and physical) in which it exists to such a degree that it prohibits the successful development and well-being of other activities and processes” (p.56). The advantages of this definition are the designation of “an indefinite period”, the scale of tourism, and the requirement (sustainable tourism should not degrade the environment).

Bramwell and Lane (1993) figure out that the arguments regarding the definition of sustainable tourism depend on whether the emphasis is on tourism itself or the role tourism plays for general sustainable development. There are two categories of definitions of sustainable tourism: one derived from the tourism literature and concentrating on the development of the tourism industry itself, and one created based on the development literature, positioning it with the sustainable development of wider society. The definition of sustainable tourism can therefore be divided into the broad definition and the narrow definition. The broad definition adopts the principles of sustainable development and transfers it into the context of tourism (Bramwell and Lane, 1993; Sadler, 1993; Ding and Pigram, 1995; WTO, 2004). It is basically the application of the idea of sustainable development into tourism industry which emphasises the role of tourism in the broad context of sustainable development. Researchers who advocate the broad definition claim that sustainable tourism “should be consistent with the tenets of sustainable development” (Stabler and Goodall, 1996, p170).

McCool and Moisey (2001) indicate that the broad definition is mainly concerned with the economic contribution of tourism industry to the sustainable development of the broader society. It is criticised, however, as overlooking the positive impacts of tourism on the protection of cultural and natural heritage and quality of life. In the light of this understanding, tourism development may be abandoned when it contradicts with the overall sustainable
development of the society (Choi, 2005). This may provoke a debate as to which industry is more important or better, for example the conflicts between tourism and animal husbandry; meaning that it is normally difficult to achieve agreement due to the different interests and views people hold.

The narrow definition of sustainable tourism stresses the need to maintain tourism businesses and a tourism-centric agenda although it may share some concerns with sustainable development (Wall, 1997; Butler, 1998). They prefer to use the term simply sustainable tourism, rather than sustainable tourism development which implies an emphasis on development. According to Butler (1999), sustainable tourism is not simply tourism developed adopting the principles of sustainable development as one sector of society. The narrow definition is the adoption of the ideological and philosophical implications of the concept of “sustainable” in tourism, stressing the maintenance of tourism.

With regards to the relationship between tourism and sustainable development, Butler (1999) asserts that the development of tourism will inevitably affect the area in which it occurs. The goal or paradigm of sustainable tourism is to make tourism more sustainable. The simple emphasis of tourism in sustainable development may contradict with this goal. Clarke (1997) argues that not all the types of tourism can be translated into sustainable ones by adopting the principles of sustainable development. As Saarinen (2006) deputed, it may be misleading when combining tourism with sustainable development and its basic goals and principles, as would be seen in a case such as sustainable sex tourism.

On the other hand, Hardy, Beeton and Pearson (2002) argue that “sustainable tourism” as a notion was first proposed (Butler’s Destination Life Cycle Model in 1980) prior to the official presentation of the term “sustainable development” in 1987. What is more, Sharpley (2007) questioned the appropriateness of applying the principles of sustainable development to tourism. He relates tourism to a number of the requirements needed to achieve sustainable development and explains the problems in the adoption of the principles. While national and international co-operation is required in the application of sustainable tourism policies, such agreements often turn out to be empty words due to the political structure and fragmented nature of the tourism industry.
Since there are both broad and narrow definitions of sustainable tourism, a question arises as to which one should be adopted. Robinson (2004) notices that the broad definition is often adopted by governments and private sector organisations, while academic and NGO sources have been more prone to use the narrow one. The broad and narrow definitions do not directly conflict with each other, however, but are correlated. The broad definition itself indicates that sustainable development principles should be adopted flexibly rather than by adhering to a dogma. There is still other argument which does not propose a clear definition of sustainable tourism but deems it as a destination-specific concept that should therefore be defined on a case-by-case basis (Manning, 1999). Also, the characteristics of different types of tourist destinations may potentially affect their sustainability (Weaver, 2006). As Clarke (1997) noted, since sustainable tourism evolves with the change of context, a consensus definition is less important as long as the general movement is in the correct direction. In other words, the application and evaluation of sustainable tourism cannot be achieved by a universally agreed definition but by whether it satisfies the principles of sustainable tourism. As for this study, sustainable tourism is deemed to be a contested concept according to different worldviews, interests and ideologies (as will be explained in detail in the next section). There is therefore no point in adopting a certain definition of sustainable tourism, whether broad or narrow. Instead, this study will concentrate on the principles of sustainable tourism and translate the Chinese cultural values into them in order to generate a different interpretation of the concept.

8.5 Deconstructing sustainable tourism (theme seven Deconstructing concepts)

Sustainable development (as for sustainable tourism) is usually discussed without reference to epistemological issues, since the Western way of acquiring knowledge through the application of scientific principles is taken as being universal (Redclift, 1992). This section examines the cultural context of the origin, development and interpretation of sustainable tourism in order to critique the cultural bias of the knowledge and to start to generate alternative ones. Theme seven of the conceptual research approaches is applied.

According to Chapter Five, ideology is used in the sociology of knowledge to analyse how knowledge and beliefs are determined by societies or within cultural contexts. People with different environmental, political and socioeconomic ideologies (O’Riordan, 1981) may have various understandings of the concept of “sustainability” (and sustainable tourism).
Sustainability is considered to be an essential part of the ideology of the New World Order which refers to the emergence of a totalitarian world government (Mowforth and Munt, 2003). The concept of sustainable development was created based on the philosophical background which considers history as fundamentally progressive (Mitcham, 1995).

The term sustainable development was traditionally defined based on the economic growth of Western-style modernisation (Redclift, 1992). The idea of sustainable development is typically the “Western” utopian way of thinking about future (Kumar, 1999). This means that the application of sustainable development relies too much on the Western view of human beings and nature, especially the assertion that humans dominate nature by science and technology. Carley and Christie (2000) claim that there are guiding values which underpin sustainable development and the decision-making processes. The answers to the questions of who defines and how to achieve sustainability can reveal the values it is based on (Mowforth and Munt, 2003). According to Chapter One, tourism knowledge production is dominated by Western gatekeepers while the values of Others are oppressed. Since sustainable tourism is a concept originated from Western-style modernisation, the interpretation is based on the Western values, thereby overlooking the insights of people from Eastern and developing countries. This explains why sustainable tourism is less likely to be successful in developing countries (Lohmann, 1990). As Carvalho (2001) stated, the developing countries may bear a much higher cost to achieve sustainable tourism if they are dependent on the Western interpretation and requirements.

Although many researchers claim that there is no common agreement as to the definition and meaning of sustainable tourism, they are willing to propose their own ones. So many different definitions indicate that sustainable development is a contested concept shaped by people’s contexts, worldviews, interests (Robinson, 2004). Different conceptions of the meaning of sustainable tourism can reflect the political and philosophical position of the ones who propose the definition (Mebratu, 1998). Robert, Parris and Leiserowitz (1995) claim that sustainable development can be defined in different ways, including its goals (what it seeks to achieve), indicators (how it is measured), values (that support or represent sustainable development) and practice (in the context of specific places and people). This indicates that a multitude of viewpoints can be addressed in defining sustainable development. Hunter’s (1995) concept of an “adaptive paradigm” considers the inherent ambiguity of the concept as
its strength, since it allows room for dynamic and evolving ideas to fit different situations and contexts (Robinson, 2004).

The study of sustainable tourism should be associated with the value systems of the societies in which it occurs (Butler, 1998). People from different organisations, cultures and contexts have different understandings of sustainable tourism (Mowforth and Munt, 2003). Although it is the Western world that has the power to define and interpret sustainable tourism, these definitions and interpretations may not be accepted by people from the developing world due to the contradictions with their own beliefs, cultural values or interests (Southgate and Sharpley, 2002). On the other hand, the concept of sustainable tourism is itself forever evolving, adapting to site and regionally specific conditions, and cannot be cast as universal (Farrell and Twining-Ward, 2005). Ko (2004) even suggests defining sustainable tourism based on a case-by-case basis because the dimensions, indicators and data gathering methods vary according to the specific conditions of each tourist destination. It is therefore not necessary to argue for a commonly agreed definition of sustainable tourism but rather to consider it as a guiding philosophy of interaction with the environment, or an adaptive paradigm that allows for multiple ideologies, approaches and cultural values to be integrated according to specific circumstances (Hunter, 1995). Any attempt to define sustainable tourism precisely would result in the exclusion of views inconsistent with those of the definer (Robinson, 2004).

Munt (1992) proposes that different interpretations of sustainable tourism should be produced for developed and developing countries so as to apply the concept successfully in each context. Moreover, this difference should not only refer to the economic circumstances, but also, and more importantly, cultural values. In this regard, it should be noted that the dominant discussions on sustainable tourism have been centred on the scientific constructions, but the cultural constructions have been overlooked (Hughes, 1995; Craik, 1995). An interrogation of recent literatures indicates that the situation has not been changed. There are still valuable efforts that have been undertaken to develop the understanding of sustainable tourism (for example in respect to different cultural contexts, different tourism forms, different types of tourist destinations, and so on), pace some researchers who have concluded that there is little left to argue about in defining the concept (Garrod and Fyall, 1998). Akena (2012) suggests the promotion of indigenous knowledge which has been suppressed by Western knowledge, adopting the legacies of diverse histories and cultures. The requirement
of the “cultural turn” of tourism research also encourages creating tourism knowledge based on non-Western cultural values. The objective of Study Two is to reinterpret sustainable tourism in the light of Chinese cultural values (Confucian and Taoist) comparing to the Western biased interpretations.

8.6 Principles of sustainable tourism (theme nine Synthesising concepts)

The previous sections have scrutinised the existing knowledge of sustainable tourism in terms of its origin, evolution, definition and debates. The aim of Study Two (to reinterpret sustainable tourism in the light of Confucian and Taoist values), however, requires translating these values to the context of sustainable tourism. It is therefore necessary to synthesise the existing understanding of sustainable tourism into principles that act as philosophical guidelines for sustainable tourism. Since these principles are neither too abstract nor too context specific, they are suitable to be compared and contrasted with the Confucian and Taoist values.

It is a surprise that literature concentrating on the principles of sustainable tourism is relatively rare compared to that on the debates regarding its concept and its application. While many studies may mention the principles of sustainable tourism, few of them explain in detail what exactly they are. Since the broad principles of sustainable development do not fit the tourism industry very well (Sharpley, 2007), tourism scholars tend to generate principles that centre on the tourism industry, although some relevant principles of sustainable development may be referred to. As with the definitions, there is no consensus as to the principles of sustainable tourism, and they have both evolved through time and varied by different organisations. The world conference on sustainable tourism in Lanzarote in 1995 proposed eighteen principles for how tourism should be controlled, whilst in 1996 ten principles were set out in the Italian town of Bellagio, the so-called Bellagio principles.

Hunter (1995, p.156) condensed the principles of sustainable tourism as being to: “meet the needs and wants of the local host community in terms of improved living standards and quality of life; satisfy the demands of tourists and the tourism industry, and continue to attract them in order to meet the first aim; safeguard the environmental resource base for tourism, encompassing natural, built and cultural components, in order to achieve both of the
preceding aims”. These principles refer to the socio-cultural, economic and environmental aspects of tourism development.

The principles of sustainable tourism that were developed by the English Tourist Board (1991) have been broadly adopted by tourism scholars since they may be clearer in their practical application. They refer to the benefits of different stakeholders, long-term considerations, the attitude towards the environment and resource, the scale, and the involvement and collaboration of stakeholders. Although there is no consensus as to the definition of sustainable tourism, it is feasible to synthesise and categorise the understandings of the concept into the following seven principles based on the relevant literature. These principles are not totally independent but have internal progressive relationships as indicated in the explanations of the principles. They will be compared and contrasted when translating the Confucian and Taoist values to sustainable tourism in Chapter Nine.

- **Principle One: Meet the needs of present tourists** (WTO, 1995). This principle is directly adopted from sustainable development proposed by the famous Brundtland Commission’s report (WCED, 1987). The first and foremost requirement of sustainable tourism is to meet the needs of present tourists, which represents the benefit of the present generation who have formulated the concept. This principle also indicates a limit to the needs of tourists, however. It emphasises tourists for it is their desires, choices and behaviours that ultimately determine the impact to the destinations. The needs of tourists should be fulfilled within the carrying capacity of the destinations so that do not cause unacceptable negative impacts.

- **Principle Two: Meet the needs of future tourists** (WTO, 1995; Haughton, 1999). This principle stresses the inter-generational equity which demonstrates the core aim of sustainable tourism. It requires meeting the needs of present tourists to be limited so that the environmental, economic and socio-cultural context on which tourism depends can be maintained to support the future.

- **Principle Three: Long-term consideration of future tourism** (English Tourist Board, 1991; Butler, 1993; WTO, 1995; Hunter, 1995; Swarbrooke, 1999). In fact, this is an extension to principle two which requires maintaining tourism in an area over an indefinite period in the future without being prejudiced by short-term benefits. This principle is difficult to follow since often governments, host communities and tour operators tend to be obsessed by the short-term benefits, especially for the less
developed areas. This explains why most of the tourist destinations are deemed to be unsustainable. The adoption of this principle requires the stakeholders’ awareness of sustainable tourism and relevant policies for them to follow.

- **Principle Four: Satisfy the demands of tourists, benefit the host communities, and maintain the quality of the environment which tourism depends on** (English Tourist Board, 1991; Hunter, 1995; Fennell, 1999; Sharpley, 2009). This principle shows the ideal condition of tourism which can be described as benefit-for-all. Conflicts exist in tourism between the stakeholders. For example, since the needs of tourists are different from those of local residents serving tourists may compete for infrastructure facilities, degrade the quality of the environment, and affect or destroy the authenticity of local culture. This principle indicates the need for a balance between the benefits of different stakeholders.

- **Principle Five: Balance the environmental, economic and social impacts of tourism** (Tourism Concern, 1992; WTO, 1995; Fennell, 1999; Holden, 2006; Sharpley, 2009). Only when all kinds of tourism impacts are balanced, can sustainable tourism be realised. This is the further requirement of principle four requiring that the environment (ecological, biological and life support systems) should not be degraded in order to acquire environmental sustainability, and that the negative impact of tourism on the host communities (normal life, culture, traditions, etc.) should be minimised to obtain social sustainability, while maximising the economic benefits to gain economic sustainability.

- **Principle Six: Make good use of environmental resources and other resources through natural conservation and management** (WTO, 2004; Holden, 2006). This principle can be considered as the precondition for the former principles. Conservation and management of environmental resources is a basic requirement for the achievement of sustainable tourism since tourism is an industry that depends heavily on them.

- **Principle Seven: Involvement and education of all the stakeholders** (English Tourist Board, 1991; Cater, 1995; Wight, 1998; Miller, 2000; WTO, 2004). The present and future interests of the stakeholders who play key roles in sustainable tourism are tied to each other. It is impossible to achieve all the other principles without the participation and cooperation of the stakeholders. To be specific, governments should bear in mind sustainable tourism principles when formulating
tourism planning and policies, the local communities should not focus only on economic benefits while compromising the other principles, and tourists should raise their awareness about sustainability and promote sustainable tourism practices. Special attention should be paid to the involvement of tourists for there is currently little evidence that tourists are very interested in the concept of sustainable tourism (Swarbrooke, 1999). Tourists may be unwilling to act responsibly in line with the principles of sustainable tourism because they may see their vacation as their one chance of the year to behave irresponsibly. It may be difficult to convince them to curtail their natural desire for escapism, to behave sensibly for the sake of the abstract concept of sustainability.

8.7 Conclusion

This chapter has concentrated on the concept of sustainable tourism with regards to its historical development, definition, cultural and philosophical bias, and its principles. Sustainable tourism originates from its root concepts of “development” and “sustainable development”. Development was first considered to be synonymous with economic growth, but they were later separated once it was recognised in the 1980s that environmental considerations needed to be taken into account in tandem with economic growth. The concept of sustainable development became well known following the report of the World Commission on Environment and Development (WCED) in 1987; this was when the idea of sustainable development was transferred to the context of tourism.

The arguments surrounding the definition of sustainable tourism depend on the extent of emphasis on tourism itself, or the role tourism plays for general sustainable development. The broad definition transfers the principles of sustainable development into the context of tourism needs, while the narrow definition of sustainable tourism tends to define it as a sectoral term, emphasising the maintenance of tourism business and a tourism-centric agenda. There is no need to generate a common agreement on a certain definition of sustainable tourism since it is a contested concept that varies according to different worldviews, interests and ideologies. This study aims to reinterpret sustainable tourism in the light of Chinese cultural values contrasting with the Western biased interpretations. Seven principles of sustainable tourism are synthesised based on the relevant literature and these will be referred to when translating the Confucian and Taoist values into the context of sustainable tourism in Chapter Nine.
Chapter 9 Critique of Sustainable Tourism Using Confucian and Taoist Values

9.1 Introduction

This chapter presents the main findings of Study Two with the aim of reinterpreting sustainable tourism in the light of Chinese cultural values. It is created based on the previous chapters (Chapter Six, Seven and Eight). Chapter Four outlined the research design and the method used in Study Two. It presented the process of the systematic literature review and indicated how conceptual research approaches can be applied into the second part of the thesis. This chapter fulfils Step Five of the systematic literature review process—Synthesis and Interpretation. Two themes from the conceptual research approaches were selected. With the adoption of theme ten (Translating concepts to new contexts), the Confucian and Taoist values are translated to the understanding of sustainable tourism. The analysis of how the Confucian and Taoism values can be integrated into the concept of sustainable tourism will be demonstrated. This is then contrasted and compared with existing principles of sustainable tourism. A reconceptualisation of sustainable tourism in the light of Chinese cultural values is proposed by following theme twelve, Proposing new concepts/Reconceptualisation.

In contrast to Chapter Six, Seven and Eight, this chapter does not refer to the content analysis of the literature but is produced based on the findings generated in these chapters. In order to reconceptualise sustainable tourism in the light of Chinese cultural values, the existing knowledge on sustainable tourism and the Chinese cultural values must be extracted first. Chapter Six and Seven successfully summarised the most important Chinese cultural values, from Confucianism and Taoism respectively. As discussed in Chapter Six, ten fundamental Confucian values ren (Humanity/Benevolence), yi (Righteousness/Justice), li (Propriety), zhi (Wisdom), xin (Trustworthiness), zhong (Loyalty), shu (Empathy), xiao (Filial Piety), xiuji (Self-cultivation) and changyuan guan (Long-term Orientation), and one ultimate target value he (Great Harmony) are used to analyse their fitness with sustainable tourism. Similarly, three Taoism values Tao (The Way), YinYang (Yin and Yang), and Wu Wei (Inaction/No-action) will be the values translating to the understanding of sustainable tourism. Then the findings in respect to the principles of sustainable tourism will be modified
according to the translation of Confucian and Taoist values. This underpins the final reconceptualisation of sustainable tourism.

9.2 Translate Confucian values to sustainable tourism (theme ten Translating concepts to new context)

As presented in Chapter Eight, tourism scholars have haggled for decades over the concept of sustainable tourism, as well as the dilemma of its application. According to the deconstruction of the concept of sustainable tourism, the definition and understandings of the concept vary based on different worldviews and cultural values. While we may be wary of the dominant interpretation of sustainable tourism by Western voices, it is an interesting and crucial issue to translate the Chinese cultural values (Confucianism and Taoism in this study) to sustainable tourism. Since the Confucian values are inherently interrelated and complementary to each other, it is difficult to translate a single value to sustainable tourism without the involvement of other values. For example, the value of Great Harmony suggests building a harmonious relationship between human beings and nature. But this relationship needs to be built on the practice of other values such as Humanity, which requires human beings to treat nature with benevolence and this further requires the codes of conduct in accordance with Propriety, and Long-term Orientation, which requires the conservation and rational utilisation of natural resources. The Confucian values are therefore not translated to sustainable tourism individually but systematically by mutual reference with regards to the seven principles of sustainable tourism summarised in Chapter Eight. The seven principles reflect four core issues in sustainable tourism: the environmental ethics, the benefits of stakeholders, the long-term consideration for the future, and the relationships among stakeholders. The translation of Confucian values to sustainable tourism is presented with regards to these four issues. It will be carried out by following theme nine Translating concepts to new contexts of conceptual research approaches.

9.2.1 Confucian environmental ethics and sustainable tourism

Since tourism is a human activity that depends on the use of the natural environment, the metaphysical view of the relationship between nature and human beings is perhaps the most basic philosophical critique determining the interpretation of sustainable tourism. This section will compare and contrast the different views on the human-nature relationship between Western people and Confucianism.
According to Raphael (1981), ethics is categorised as one form of the philosophy of practice (other examples include politics, law, etc.) and the concept of ethics consists of philosophical inquiry into the values and practical application of moral behaviour. The definition of the human-nature relationship leads to the issues which are described as environmental ethics. These are concerned with the relationship between the environment and humans (Holden, 2003) with typical questions of responsibilities towards the environment (Cornnelly and Smith, 1999). The task of environmental ethics is to construct a system of guidelines governing human’s attitudes, behaviour and actions towards nature (Ip, 1983).

Although the environmental impacts of tourism were recognised in the 1970s (Jones, 1972; Budowski, 1976), tourism scholars did not attach much importance to environmental ethics until 1990s. In relation to sustainable tourism, Cater (1995) discusses the environmental contradictions and advocated building on the positive links between the tourism industry and the environment, while Hughes (1995) indicates some of the environmental ethical issues of sustainable tourism in Scotland. Fennel (2002) claims that sustainable tourism is a process of applying ethics. The Judaeo-Christian belief that “man” is made in the image of God links to the belief that human beings dominate over the environment (Pepper, 1996). Western man inherited from the Enlightenment a view that nature does not have intrinsic value but only instrumental value defined in terms of human needs (Ip, 1983). Further development of the belief was referred to as “instrumentalism” (Simmons 1993) which considers the natural resources to have instrumental value for human use.

Macbeth (2005) argues that the current discourse on the concept of sustainable tourism has a social justice dimension but is ethnocentrically formulated by Western scholars. Although the Western concept of sustainable tourism indicates a moral responsibility to ensure that future generations inherit un-degraded natural resources, this is not a recognition of the rights of nature (Holden, 2003). Cooper (1992) asserts that the paradigm of sustainable tourism could not be achieved unless new environmental ethics are able to go beyond the anthropocentric viewpoint of the world paradigm. We can therefore assume that the debates on sustainable tourism, and the unsuccessful application of its principles, might be attributed to the deficiency of Western anthropocentric values.
To examine the seven summarised principles of sustainable tourism in Chapter Eight, Principles One and Two clearly state that the primary aim of sustainable tourism is to meet the needs of present and future tourists. This is an obvious anthropocentric value which depends on the viewpoint of human beings. Although Principle Four requires maintaining the quality of the environment that tourism depends on, its aim is also to fulfil the interests of human beings in terms of satisfy the demands of tourists and benefitting the local community. Similarly for Principle Five, the consideration to minimise the negative impact on the environment arises from anxiety about a decrease in economic benefits because the degrading of environment will abate the attraction to present tourists or even destroy the tourism industry in the future. Principle Six makes good use of environmental resources and other resources and therefore represents instrumentalism. In a nutshell, these principles reflect that the current understanding of sustainable tourism is generated based on anthropocentric values compromising the rights of nature.

The existing principles of sustainable tourism lack philosophical foundations and so needs a philosophy that can attribute values to nature independently of human needs, and that confirms that human beings are part of a universe whose parts mutually nourish, support and fulfil each other. As Holden (2003) claimed, the acceptance of non-anthropocentric ethics requires a conceptual shift in the belief system to go beyond the Western. In contrast, non-Western religions tend to discourage a demarcation between humans and nature (Holden, 2003). Chinese cultural values, both in Confucianism and Taoism, emphasise the harmony of the universe and the unity of humans and all the other beings. Distinguishing views on the relationship between humans and nature from the Western ones (see Table 9.1) may indicate that Chinese cultural values are capable of providing a philosophical underpinning for environmental ethics which is consistent with the principles of sustainable tourism.

Table 9.1 Comparison of Confucianism and Western Values on Human-Nature Relationship

<table>
<thead>
<tr>
<th>Confucianism</th>
<th>Western Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unity of Humans and Nature</td>
<td>Binary of Humans and Nature</td>
</tr>
<tr>
<td>Humans are a part of Nature</td>
<td>Humans are morally superior to Nature</td>
</tr>
<tr>
<td>Conform to Natural Rules</td>
<td>Challenge Natural Rules</td>
</tr>
<tr>
<td>Harmony</td>
<td>Dominance</td>
</tr>
</tbody>
</table>

Source: (Xin, 2010, Master’s dissertation submitted to University of Surrey)
According to Chapter Six, human beings are considered to be one of the myriad participants in the world. Humans are deemed to be a part of nature and so man needs to develop a harmonious relationship with nature for his own benefit. Since man is a natural being, humans are equal with, rather than superior to, nature. The Confucian view on the environment considers man as the exponent rather than the conqueror of nature. Human beings need to learn how to adapt to nature so as to achieve harmony with it. Confucianism asserts that nature is not created by a transcendent God for the benefit of humans.

As for the relationship between human beings and nature, several Confucian values are involved. The core value of ren (Humanity) requires human beings to treat nature with benevolence, rather than plunder and destroy relentlessly in the name of human needs. Humanity should not only be applied among human societies but also to nature, as indicated by Mencius “love and esteem one’s relatives and extend it to all the other people and further to all the non-human creatures”. Extension of this idea is to treat nature in the same way people treat their parents. It thus can be linked to xiao (Filial Piety), since we call it Mother Earth. Human beings should reflect on whether their actions towards nature conform to yi (Justice/ Righteousness), and the natural rules of li (Propriety). The ethical requirements are extended to nature, which is known as environmental ethics, based on the relationship between the Way of Humanity and the Way of Heaven. Confucianism encourages following the natural rules, rather than working against them, in order to achieve he (Great Harmony) with the nature.

Confucianism has developed a special term to express its idea on the harmonious relationship between nature and human beings which is “unity of nature and man”. It is also translated as “oneness of nature and man”. As Confucius depicted in his review of I-Ching, “The superior man is in harmony: in virtue with Heaven and Earth; in brightness with the sun and moon; in orderly procedure with the four seasons. He may precede Heaven but not oppose the principles of Heaven. He may follow Heaven by aligning with the timing of Heaven” (I-Ching: The Great Appendix, Section 1). The unity of nature and man stresses the coordinated relationship between humans and nature, concerning man’s recognition, protection and usage of nature (Zhang, 2007). It is not opposed to the exploration of natural resources but preaches that this should be undertaken timely and temperamently according to the natural rule. The essence of unity of nature and man is environmental ethics, which can offer an alternative philosophical underpinning of sustainable tourism apart from the Western
anthropocentric one. Principles of sustainable tourism will therefore be achieved with the adoption of Confucian environmental ethics.

9.2.2 Self-cultivation (Xiuji) and sustainable tourism

Benefit or interest (not just about economic profit) is a concept throughout sustainable tourism and is reflected in its principles. Principles One and Two focus on the interests of tourists to meet their needs in the present and in the future. The essence of Principle Four is about the benefits of tourists, local communities and the environment. The economic benefit which is referred to in Principle Five is the most import motivation for the tourism industry. Sustainable tourism involves the question of how to seek and balance the benefits of tourists, local communities and the environment. It is debateable, however, whether these can be accomplished simultaneously. With the explosion in the desire for travel, the tourism industry has developed extremely fast during the past decades. The attraction of economic profits became the motivation for tourism operators to meet tourists’ demand as much as possible. This led to mass tourism which conflicted with sustainable tourism because of its tendency to attract more tourists than the capacity of the tourism destinations, thus destroying sustainability. In other words, if the demands of tourists are not restricted, sustainable tourism cannot be realised. The precise interpretation of the principle should therefore be the limited meeting of the needs of present and future tourists. This consists of two requirements: tourists should restrain their excessive demand for tourism and tourism operators should resist the seduction of the economic benefits of mass tourism.

This would seem to be extraordinarily difficult, however, since Western culture stresses personal rights and freedoms rather than taking responsibility for others (Bedford and Hwang, 2003). Both tourists and tourism operators consider the demand for tourism to be their personal rights that should be respected rather than restrained. Principle Four of sustainable tourism highlights the benefits of tourists, host communities and nature. But what is the definition of the scope of the benefits? Does it mean the satisfaction of all the needs of tourists and economic benefits of host communities? The belief in hedonism (a school of thought that argues that pleasure is the primary or most important intrinsic good) hinders the willingness of tourists to sacrifice their need for tourism for the sake of others or future generations. The prevailing consumerism (which encourages the acquisition of goods and services in ever-greater amounts), and utilitarianism (which conceives that virtue is based on the greatest happiness of the most people) leads tourism operators to the pursuit of maximum
profits by attracting the greatest amount of tourists. The benefits of nature thus have to yield to the benefits of tourists and host communities. In this circumstance, sustainable tourism will tend to be a Utopian dream which is far beyond the range of possibility.

In contrast, Confucianism emphasises social responsibilities and Self-cultivation (xiujì). As presented in Chapter Six, Self-cultivation requires the practice of Humanity (ren), Justice (yì), Propriety (li), Wisdom (zhi), Trustworthiness (xin), Empathy (shu), Loyalty (zhong) and Filial Piety (xiao). Furthermore, the control of desire is the basic method to apply the practice. It is believed that control of desire is the precondition for becoming a Gentleman (a man of moral integrity). According to Mencius, “to minimise excessive and irrational desire is the best way for self-cultivation”. Acting wilfully without desire control is against the natural principles and justice which will result in beastliness (Book of Propriety). This idea was popularised by the Confucian scholars in the Song Dynasty, who advocated natural principles and justice while minimising excessive and irrational desire. This Confucian value can compensate for the deficiency of Western philosophy in underpinning the principles of sustainable tourism.

Confucianism, as a system of ethics, emphasises the right attitude towards benefit and the proper actions when pursuing ones interests as ethical requirements. Confucianism offers an explicit interpretation of the right attitude towards benefit in its relationship with yi (Justice). For example, “Although wealth and benefit are what a man wants, they should not be accepted unless obtained in a just way” (The Analects of Confucius, Chapter 4); “The gentleman (a man of moral integrity) values Justice while the villain (a man of base character) values Benefit” (The Analects of Confucius, Chapter 4). This does not mean that human beings should not seek benefits but that they should do so in a way consistent with justice. This rule is described by Confucius as “consider Justice in front of Benefit”. A man should always bear in mind Justice when he comes across Benefit since in doing so he will know how to behave ethically. In addition, Hsun Tzu proposed “restrict Profit by Justice”. He claimed that human beings’ fervent desire for Profit will lead to unethical behaviours without restriction. Justice is an effective tool for the restriction of greed for Profit.

The Confucian opinions on Benefit can shed light on how to deal with the benefits that exist in sustainable tourism. According to Bedford and Hwang (2003), the ideology of individualism in Western culture, which stresses personal rights and freedoms, leads to a
reluctance to take responsibility for others. Man therefore tends to privilege his own benefits to those of others, not to say the benefits of nature and future generations. Respect for the benefits of nature and future generations are, however, the basic requirements of the principles of sustainable development, as well as sustainable tourism. In the light of Western anthropocentric ethics, human beings tend to sacrifice nature to gain their own benefit. In contrast, Confucian environmental ethics emphasise human beings’ responsibility for nature, as mentioned in previous section. For tourists, the needs and desire for tourism are their benefits, but they should consider Justice in terms of the possibility that their needs could have negative impacts on nature, the local communities, other tourists and even future generations. If so, they should restrict those needs and behaviours that are inconsistent with Justice. For local communities, when pursuing the economic benefits of tourism, they should guarantee that the exploration of tourism does not degrade the environment and harm the rights of tourists. For tour operators, Justice refers to environmental ethics (for example limiting the number of tourists so that they do not harm nature), responsibilities for the society (for example respecting the rights of tourists, protecting the culture of the host communities) and commercial ethics (for example fair competition, being ethical to their staff). To summarise, only when all the stakeholders involved in adopt the rule of superior Justice to Benefit can the principles of sustainable tourism be achieved.

Apart from Justice, other values can also be related to the benefits involved in sustainable tourism. Humanity requires people to respect the benefits of others (including nature) rather than being only concerned with their own benefit. Propriety provides guidance for the behaviours of tourists, host communities, tourism operators and policy makers when they are pursuing their benefits. The Confucian value of Wisdom can shed light on Principle Seven: the education of all the stakeholders in terms of the awareness of sustainable tourism principles, the possible negative impacts on the environment and other people, including future generations, as a result of their behaviours and policies. What is more, Empathy with the interpretation of “treating others as what you want to be treated” and “not to do to others as you would not wish to be done to yourself (The Analects of Confucius, Chapter 12)” may enlighten tourists on the tourism rights of others (both present and future generations) and the protection of the environment at the visitor attractions so that it will be adequate to serve others.
9.2.3 Long-term Orientation (*Changyuan guan*) and sustainable tourism

Conservation is an important philosophy within sustainable tourism, and is reflected in Principle Two: meeting the needs of future tourists and Principle Three: the long-term consideration of future tourism, which implies the requirement of conservation for the future. Principle Six explicitly advocates the conservation of environmental resources and other resources in order to achieve sustainable tourism. Confucianism, with its Long-term Orientation value, therefore coincides with the long-term consideration philosophy reflected in the principles of sustainable tourism.

According to Confucius, “The man who has no long-term considerations for the future will come across troubles close at hand (*Analects of Confucius*, Chapter 15)”, “Haste makes waste. The man who focuses on the profits shortly ahead of him will never gain tremendous success in the future (*Analects of Confucius*, Chapter 13)”. For tourism, tourists will find that the destinations are not that attractive (in ten years for them or fifty years for the next generation) because of the deterioration of the environment if they do not have awareness of protection and conservation for future tourism; tourism operators will encounter loss of business if they focus on the short-term economic profits while compromising the principles of carrying capacity, natural resource conservation and social-cultural issues; and tourism policy makers will degrade the tourism industry if they do not take the long-term principles of sustainable tourism into account in the policies. Confucianism believes that “Good preparation secures success while poor preparation leads to failure (*The Doctrine of Mean*, Chapter 20)”. This indicates that good preparation and planning, both of which are linked with long-term development, should be made in order to realise sustainable tourism.

There has been much debate about the conservation of natural resources in Confucianism. The exploitation of tourism resources should be in accordance with the concept of frugality and the principle of “Utilise Timely and Temperately”. Frugality is highly advocated in Confucianism, as shown in the statement that “Frugality is the requirement of Propriety, rather than extravagance (*Analects of Confucius*, Chapter 3)”. Extravagance is opposed because it is arrogant and wasteful, which is inconsistent with the ethical regulation of Propriety (*Analects of Confucius*, Chapter 7). The application of Frugality to the exploitation of natural resources conforms to the principle of “Utilise Timely and Temperately”. Confucianism is against the excessive exploitation of natural resources. For example,
Confucius declared that “People should not use the net with a fine mesh for fishing and should not kill the birds in the nests (Analects of Confucius, Chapter 7)” . This demonstrates the idea of conservation and protection of natural resources for the future. The extinct utilisation which is described as “catch the fish by draining the pool (Lu Shi Chun Qiu, Chapter 14)” is considered as a stupid action.

The Master Mencius criticised the short-sighted and immoderate exploitation for present economic benefits by giving an example of Niushan where the beautiful forest ended up devastated (Mencius, Chapter Gaozi). He proposed the right way to use natural resources as “The grains will be substantial if the season for farming is not violated; there will be inexhaustible fish for humans if the nets with a fine mesh are not used; the woods will be adequate for the future if the trees of the forest are felled at the right time (Mencius, Chapter Lianghui Wang)”. This is a good interpretation of the principle of “Utilise Timely and Temperately”. Relating to sustainable tourism, it implies that the exploitation of natural resources should be limited within its self-repairing ability so as not to degrade its quality for future tourism. This is similar to the philosophy of tourism carrying capacity, a concept occupying a key position with regard to sustainable tourism (Tribe, Font, Grittis, Vickery and Yale, 2000), which restricts the number of tourists to maintain the situation without excessive deterioration of the environment and decreasing tourists’ satisfaction (Buckley, 1999; Abernethy, 2001). “Utilise Timely and Temperately” is not the negation of exploitation of natural resources but aiming to gain symbiosis relationship between nature and tourism as required by the philosophy of sustainable tourism (Brandl et al., 2011).

9.2.4 The Great Harmony (He) and sustainable tourism

The philosophy of harmony is indicated in the principles of sustainable tourism. The benefit-for-all the stakeholders in Principle Four, the balance of all kinds of impacts of tourism in Principle Five, and the involvement and coordination of all the stakeholders in Principle Seven, all imply the requirement for harmony. The word “harmony” appears in the principles for sustainable tourism developed by the English Tourist Board (1991) as “harmony must be sought between the needs of the visitor, place and host community”. There is a lack of metaphysical underpinnings for this sentiment, however, and it is not sufficient simply to translate this concept into the context of sustainable tourism. Confucianism, on the other hand, sheds light on the integration with its emphasis on the value of Great Harmony.
According to Chapter Six, although “harmony” is considered as the most proper translation of he, it cannot reflect and reveal the profound meaning connoted in the concept such as “the Mean” and “the requirement of li (propriety)” and so on. Great Harmony is the ultimate value of Confucianism, and can be achieved through people’s Self-cultivation or, in other words, the practice of Humanity (ren), Justice (yi), Propriety (li), Wisdom (zhi), Trustworthiness (xin), Empathy (shu), Loyalty (zhong) and Filial Piety (xiao). Great Harmony not only refers to interpersonal relationships but also the relationship between human beings and nature, as discussed in section 9.2.1. Harmony is the relative stable and balanced harmony of the system, rather than the denial of all change and diversity. A harmonious system does not mean that there are no conflicts within it but that these coexist and are balanced, as reflected in the phrase “Harmony with Differences” promoted by Confucius. It is believed that the harmonious society would be realised when people are full of Humanity, attach more importance to Justice rather than Benefit, restrict their behaviours according to Propriety, are educated with Wisdom, show Trustworthiness to others, develop Empathy between themselves and others, abide Loyalty to family/institution/society/country, and observe Filial Piety; in other words, when they conform to Self-cultivation. The society with Great Harmony is the ideal situation that can develop sustainably.

Great Harmony is the harmony of the system rather than the harmony of individual parts, it contains contradictions that accord with the Doctrine of the Mean, which requires “being moderate and never going to extremes”. Great Harmony is not the denial of change and diversity. It can only be achieved through the practice of the Confucian virtues. It is believed in Confucianism that only harmonious development can be sustainable. In relation to the system of tourism, sustainable tourism will be realised if Great Harmony is achieved within the system. In the light of Great Harmony, in order to develop sustainable tourism, eleven harmonies of human beings are involved, including harmony between tourists, harmony between tourism operators, harmony between local communities, harmony between policy makers (different departments or levels of governments), harmony between tourists and tourism operators, harmony between tourists and local communities, harmony between tourists and governments, harmony between tourism operators and local communities, harmony between tourism operators and governments, harmony between local communities and governments, harmony between tourism operators and their employees; and harmony between all the human beings involved in nature have to be achieved.
While the existing principles of sustainable tourism may indicate the need for harmonious relationships between the environment, tourists, host communities, tourism operators and governments, it is not clear how this could be achieved. Strictly speaking, although codes of good practice (see, for example, ETB, 1991; Countryside Commission, 1991; Green, 1990) or codes of sustainable tourism (see, for example, Mihalic, 2000; Weaver, 2006) have been developed, there might be a deficiency in the philosophical and value-based underpinnings for these, as discussed in previous sections. Confucianism, as a philosophy based on ethics, may offer a way to bridge the gap. With the adoption of Confucian environmental ethics and a Long-term Orientation in respect to the conservation of natural resources, harmony between nature and human beings, the “Unity of nature and man”, can be built; with the practice of the Confucian values (Interpersonal Relationship based on Ethical Orientation, Long-term Orientation, Self-cultivation and further on Humanity, Justice, Propriety, Wisdom, Trustworthiness, Empathy, Loyalty and Filial Piety), the eleven harmonious relationships between the human stakeholders can be developed.

9.3 Translate Taoist values to sustainable tourism (theme ten Translating concepts to new context)

While section 9.2 demonstrates the application of Confucian values to the context of sustainable tourism, this part will focus on the translation of Taoist values. Two perspectives, that of Taoist environmental ethics and the principle of Wu Wei, will be focused on. Similar to the last section, theme ten of the conceptual research approaches is adopted.

9.3.1 Taoist environmental ethics and sustainable tourism

Taoism, as a philosophy addressing Nature, can be considered as a conceptual resource for addressing some of the fundamental issues of environmental ethics (Ames, 1986). The anthropocentric environmental ethics based on Western values were presented in the last section. Here the discussion will be centred on how Taoism considers nature and the relationship between it and human beings.

In order to understand the Taoist conception of nature, the notion of Tao (The Way) has to be explained first. According to Chapter Seven, Tao stands for the ultimate reality of nature. Tao is depicted as a process of change and transformation. To be specific, everything in the universe is the result of self and mutual transformation which is governed by the
interactions of Yin and Yang. Taoism indicates that things are related to each other not only
metaphysically but also morally. Man, as a member of the natural world, is without exception
internally linked to Tao as well as to everything else. Moreover, man is also endowed with
the capacity of doing virtuous things towards his counterparts. Thus, a metaphysical linkage
between man and nature is established. Human beings are not separated from nature but
interrelated with it.

The Western conception of environment centres on technology and science (Cheng, 1986), while Taoism does not treat it as a machine tool but a deep structure and process. According to Chuang Tzu’s saying “The Tao is nowhere and not present”, it embraces everything. Whereas Western people focus on the external relationship of man to non-human worlds, Taoism (Confucianism as well) concentrates on the internal relationship between man and the environment, based on an integrative interdependence and a harmony (Cheng, 1986).

The Western philosophy follows from Descartes’ views that nature is to be rationally studied, researched and exploited for the maximum benefit of serving human beings (Cheng, 1986). In contrast, Taoism has developed an internalistic view of the environment which deems humans as a participant in nature rather than its conqueror. The understanding of the environment in terms of the Tao is very essential for formulating the environmental ethic, namely for articulating what human beings should do or the attitude towards their surrounding world. Contrary to homocentrism, Taoism believes that there is a kind of egalitarian axiology of beings because they are formed as a result of a process of self- and mutual-transformations. Given the fact that man-nature is an inherently connected whole, and that man and other beings are ontologically as well as axiologically equal, the answer as to how man should behave or act towards the natural surroundings is confirmed.

In other words, Taoism rejects the Western view that human beings have dominion over
nature and other beings, but sees them as a part of the nature which they should formulate
harmony with. Taoism believes that there is a harmonious order in the process of existence
(Ames, 1986). It is claimed that realising harmony is called constancy. The environmental
ethics of Taoism is the art of harmonising with the Tao, as well as the art of self-realisation in
nature by the way of the Tao. As for sustainable tourism, Taoism has developed a similar
paradigm of attitude and behaviours as Confucianism. But Taoism formulates a different way
to realise this: that of taking the doctrine of Wu Wei (Non-action), in contrast to the ethical approach of Confucianism.

**9.3.2 The doctrine of Wu Wei (Non-action) and sustainable tourism**

According to Chapter Seven, although *Wu Wei* is translated as “Non-action”, it does not mean doing nothing but not doing things in violation of the laws of nature. *Wu Wei* is “acting naturally” rather than “acting wilfully”. In fact, *Wu Wei* is the requirement for the most appropriate actions that are well-planned and deliberative. *Wu Wei* is the negation of “acting” of that kind of engagement that makes something false to itself. Since *Tao* is also interpreted as laws of nature which determine human conduct without human conduct determining the laws, *Wu Wei* is another way of saying “following *Tao*”.

There are many kinds of ways to apply the doctrine of *Wu Wei* to the context of sustainable tourism. *Wu Wei’s encouragement of* well-planned and deliberative actions which are consistent with the natural laws suggests good planning of tourism and codes of conducts for sustainable tourism. The application of *Wu Wei* to the environment requires all stakeholders (tourists, tourism operators, host communities and policy makers) to respect the intrinsic value of nature and thus allow only a rational exploitation and utilisation of the natural resources in the process of tourism. The philosophy that a human being is irreducibly a “person-in-environment” implies personal responsibility to the nature and other people. The doctrine *Wu Wei* includes the saying “Deal with things before they appear; Put things in order before disorder arises… (*Lao Tzu*, Chapter 64)”. This indicates the long-term orientation encouraging tourists to behave themselves properly during their visit; that tourism operators should attach importance to the environmental and social-cultural benefits without devoting themselves to economic profits only; and that governments should take all the positive and negative impacts of tourism into account when engaged in tourism planning and related policies in order to avoid the disorder or even the failure of tourism in the future. *Wu Wei* is the “perfect activity that leaves no track behind it (*Lao Tzu*, Chapter 27)”. This “leaves no track behind it” in the context of tourism is the requirement to minimise the negative impacts of tourism so as to limit them within the self-repairing ability of nature and the local societies. The capability to host tourism will therefore not be degraded or, in other words, sustainability will be obtained.
Similar to Confucianism, Taoism also addresses the harmony of the system of tourism in order to attain sustainability. Human beings involved in tourism need to preserve a sense of harmony with regards to nature. With the adoption of the doctrine of Wu Wei, human beings involved in tourism will not take actions that may harm the environment so that the harmony between human beings and the environment can be formulated. They will also not take actions during the process of tourism that may have negative influences on other people so that harmony can be achieved between human beings. In this circumstance, the system of tourism will be maintained in an ideal status which will be constant or, in other words, sustainable.

The three aspects, “not scrambling for it”, “desire control”, “be moderate”, which are the essence of Wu Wei can be translated to sustainable tourism. Sustainable tourism intrinsically rejects the maximum economic benefits through the expenses on the environmental and social maintenance. Tour operators should not scramble for excessive economic benefits at the cost of environmental and social benefits. The benefits can be gained in the long run with the achievement of sustainable tourism. Desire control here is similar to the requirement of Self-cultivation in Confucianism, which indicates the stakeholders’ responsibilities to abandon desires that may have negative effects on others, the environment and future generations. Wu Wei requires the moderate exploitation of the environmental resources in developing tourism so as to attain sustainability.

9.4 Reconceptualise sustainable tourism using Confucian and Taoist values (theme twelve Proposing new concept/Reconceptualisation)

As discussed in Chapter Eight, sustainable tourism is a contested concept based on different perspectives and values. The arguments about the definition of sustainable tourism depend on the emphasis on tourism itself (the narrow definition) or the role tourism plays for general sustainable development (the broad definition). There is no need to generate common agreement on a certain definition of sustainable tourism for it is a contested concept that varies according to different worldviews, interests and ideologies. The practice of sustainable tourism tends to be unsuccessful following the Western interpretation of the concept. This might be attributed to the deficiency of Western values in underpinning the principles of sustainable tourism.
Table 9.2 Confucian and Taoist Values and their Suggestions on Sustainable Tourism

<table>
<thead>
<tr>
<th>Confucian and Taoist Values</th>
<th>Suggestions on Sustainable Tourism</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Ren</em> (Humanity): the highest attainable moral standard; the consciousness of ethics and the pursuit of virtue; love towards others</td>
<td>The need to formulate and practice a moral standard based on virtue and love towards others to achieve sustainable tourism. Human beings should treat nature with Humanity, respect the value and right of nature, love and take responsibility for nature. Stakeholders should treat others with Humanity, respect the rights of others and avoid the actions which may have negative impacts to others.</td>
</tr>
<tr>
<td><em>Yi</em> (Justice/Righteousness): adhering to moral principles</td>
<td>Do not compromise virtue ethics when it is expedient. Stakeholders should adopt the principle of “superior Justice to Benefit”: restrict their needs and desire for benefits so that does not compromise the benefits of others (the quality of environment, the economic benefits of host communities, the rights of current tourists and future generations and so on).</td>
</tr>
<tr>
<td><em>Li</em> (Propriety): the socially accepted regulations of proper conduct and good manners</td>
<td>Develop a culture of virtue ethics. Develop codes of conduct for all the stakeholders (tourists, tour operators, host communities and policy makers) according to the principles of sustainable tourism.</td>
</tr>
<tr>
<td><em>Zhi</em> (Knowledge and Wisdom): emphasis on studying and the exploring for knowledge</td>
<td>More research on the understanding of sustainable tourism in terms of the meanings, the principles and the practice. Education of the stakeholders in terms of the awareness of sustainable tourism principles.</td>
</tr>
<tr>
<td><em>Xin</em> (Trustworthiness): honesty and trustworthiness</td>
<td>Develop accountability and trustworthiness for sustainability at a personal, business and government level.</td>
</tr>
<tr>
<td><em>Zhong</em> (Loyalty): serve with all one’s heart unfeigned</td>
<td>Be loyal to the virtue ethics of sustainable tourism and follow them with your heart. The employees in tourism industry should be loyally to their organisations.</td>
</tr>
<tr>
<td><em>Shu</em> (Empathy): the empathy that extend from oneself to others and treat others same as they treat themselves</td>
<td>Create an empathy for others and nature in tourism. Treat others as if they were your brother, treat the outside world as if it were your garden. Human should extend the ethics to nature, love towards nature and respect the right of nature to ensure the exploitation does not degrade the quality of environment and its sustainability. Tourists should restrict their needs and behaviours to maintain the sustainability of tourism so that it will be adequate to serve others (both present and future generations). Tour operators should conform to fair trade and competition.</td>
</tr>
<tr>
<td><strong>Xiao (Filial Piety):</strong> the obedience, respect and obligation towards the parents</td>
<td>Cultivate respect and obligation for nature.</td>
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<tr>
<td>---</td>
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</tr>
<tr>
<td><strong>Xiujii (Self-cultivation):</strong> self-consciousness of cultivation of moral integrity through the practice of the virtues</td>
<td>Develop personal ethics, responsibility and good practise for sustainability: Do not leave it for others or rely on codes. Encourage the stakeholders to cultivate their moral integrity so that can restrict their behaviours and minimise the negative impacts to the environment and the benefits of other stakeholders.</td>
</tr>
<tr>
<td><strong>Changyuan Guan (Long-term Orientation):</strong> the emphasis on the target, planning, preparation and conservation for future</td>
<td>Make good planning and policies with the long-term consideration of future tourism. Make good use of environmental resources by adopting the principle of “utilise timely and temperately”.</td>
</tr>
<tr>
<td><strong>He (Great Harmony):</strong> the ideal situation of a system is relative stable and sustainable with harmonious relationships among the components</td>
<td>Strive for harmony in the self, with others and the planet and make sustainable tourism part of that greater harmony. Human beings in tourism should develop harmonious relationship with nature in order to achieve the environmental sustainability. Stakeholders should develop harmonious relationships among each other in order to achieve the economic and socio-cultural sustainability.</td>
</tr>
<tr>
<td><strong>Tao (The Way):</strong> a process and the container and origin of process and the laws of process</td>
<td>Human beings is not separated from the nature but interrelated. Human is part of nature which should formulate harmony with.</td>
</tr>
<tr>
<td><strong>Yin and Yang:</strong> contradictions which are both opposite and complementary to each other exist in both society and Nature</td>
<td>Tourism has both positive and negative impacts on the environment, economy, society and culture. Only when the positive and negative impacts are balanced can sustainable tourism be achieved.</td>
</tr>
<tr>
<td><strong>Wu Wei (Non-action):</strong> no action in violation of the natural laws; “no scramble for it”, “desire control”, and “moderate”</td>
<td>Practice moderation and respect for nature. Well-planned and deliberative actions which are consistent with the natural laws suggest good planning of tourism and codes of conducts for sustainable tourism. No scramble for the excessive economic benefits at the cost of environmental and social benefits. Stakeholders should abandon the desires which may have negative impacts to others, the environment and the future generations. Moderate exploitation of the environmental resources in developing tourism so as to gain the sustainability.</td>
</tr>
</tbody>
</table>
In the above sections, the Confucian and Taoist values are translated to sustainable tourism in a systematic way by mutual reference to the seven principles of sustainable tourism. Although the Confucian and Taoist values are not suitable for translating into principles individually, their suggestions on sustainable tourism are able to be summarised (see Table 9.2). These suggestions could be synthesised into principles of sustainable tourism referring to the existing seven ones.

The deficiency of Western values in underpinning the principles of sustainable tourism has been discussed in the above sections. The seven principles reflect that the current understanding of sustainable tourism is generated based on Western anthropocentric values, compromising the rights of nature. Although the principles refer to maintaining the quality of the environment and making good use of environmental resources, the aim is to fulfil the interests of human beings, and thus remain fundamentally anthropocentric. The realisation of the principles requires stakeholders to exhibit desire control and the ability to compromise; for example tourists should restrain their excessive demands for tourism, and tourism operators should resist the seductions of the economic benefits of mass tourism. The fact that Western culture stresses personal rights and freedom, pleasure, acquisition of goods and services in ever-greater amounts conflicts with the intrinsic requirements of the principles of sustainable tourism. In contrast, the most representative Chinese values of Confucianism and Taoism have the potential to remedy this deficiency. In addition, the Chinese values can offer new insights to the principles, such as that stakeholders should develop a harmonious relationship with the environment. It is therefore necessary to improve and modify the original seven principles of sustainable tourism in the light of Confucian and Taoist values. Based on the discussions in the above sections, the principles are modified as follows:

- **Principle One: Respect the value and rights of nature by rejecting the anthropocentric environmental ethics.** The Confucian and Taoist environmental ethics consider humans as participants in nature rather than a predator of nature, and thus stress the responsibility of humans for nature rather than plundering and destroying relentlessly in the name of human needs. Human beings need to learn how to adapt to nature so as to achieve harmony with it. Only when the harmonious relationship of humans and nature is formulated can sustainable tourism be achieved.
• **Principle Two: Limiting the demands of present and future tourists.** This is the intrinsic requirement of principle one: to balance human rights and the rights of nature. The unrestricted satisfaction of the excessive desire and needs of tourists will tend to result in mass tourism, which compromises the rights of nature, rather than sustainable tourism. The application of this principle indicates the requirement of desire control which is stressed both in Confucianism and Taoism.

• **Principle Three: Create virtuous planning and policies with the long-term consideration of future tourism.** This reflects the goal of sustainable tourism to maintain tourism in an area over an indefinite period. It is consistent with the Long-term Orientation of Confucianism and the *Wu Wei* of Taoism, which encourages good preparation and well-planned actions.

• **Principle Four: Make good use of environmental tourism resources through natural conservation and management.** This is the further requirement of respecting the rights of nature (Principle One). Confucianism encourages applying Humanity, Justice and Propriety to the exploitation of environmental resources, and adopting the rule of “utilise timely and temperately”. Taoism stresses following the *Tao* (laws of nature) and a rational exploitation and utilisation of the resources within the self-repairing ability of nature.

• **Principle Five: Balance the environmental, economic and social impacts of tourism by considering the benefits of tourists, host communities and the environment.** This requires the maintenance of the quality of the environment and socio-cultural authenticity in meeting the needs of tourists and the economic benefits of host communities. It indicates the ethical requirements of right attitude towards benefit and the right actions when pursuing the benefits underpinned in the Confucian and Taoist values.

• **Principle Six: Develop codes of conduct for all the stakeholders** (tourists, tour operators, host communities and policy makers) **according to the principles of sustainable tourism.** This is the requirement of the application of the other principles. The Confucian and Taoist values should be adopted in developing the codes of conduct.

• **Principle Seven: Encourage the stakeholders to increase their awareness of the principles of sustainability and practice virtuous tourism for**
sustainability. This is inspired by the promotion of Self-cultivation for moral integrity based on the practice of the Confucian values of Humanity, Justice, Propriety, Empathy and so on.

- **Principle Eight: Develop a harmonious relationship with and between the tourism environment and its stakeholders.** Both Confucianism and Taoism stress the harmony within the balance of the contradictions. Only when harmonious relationships are developed in the tourism system can sustainability be achieved.

Based on all the discussions, the concept of sustainable tourism in the light of Confucianism and Taoism can be reconceptualised as “The Way of Sustainable Tourism” and defined as:

“the virtuous practice of tourism as part of the greater harmony between people and the planet so that tourism contributes to this greater harmony and virtue. The economic, social and environmental impacts are moderated by tourists’ empathy and love for host communities and the environment. It requires stakeholders to cultivate and practice the principles of sustainable tourism enlightened by Confucian and Taoist values”.

Three differences in this definition from the ones proposed by Western scholars can be identified. First, it indicates that sustainable tourism is a virtuous system that can be maintained constantly by developing harmonious relationships between the environment and between the stakeholders. Second, it stresses compromise between the benefits of the stakeholders rather than the fulfilment of the needs of them without limitation. Third, it emphasises the participation and responsibility of the stakeholders in terms of their consciousness in practising the principles and codes of conduct of sustainable tourism.

**9.5 Reflections on the reconceptualisation of sustainable tourism**

Although the differences between “The Way of Sustainable Tourism” and the Western definitions are listed above, the reconceptualisation does not directly challenge the Western interpretations of the concept. Instead, it offers an alternative discourse which plays a role as a complement to the Western understandings of sustainable tourism. This also conforms to the principles of interpretivism, as explained in section 2.3.2. It is also a response to the criticisms from tourism studies and encourages wider societal engagement of researchers.
from non-Western cultures in tourism knowledge creation. The thesis might tell a binary story of the division between Western and Chinese in interpreting sustainable tourism. The author has chosen to approach the problem by taking a simplified binary approach in order to expose the issues more clearly; however, the actual situation is more complex. On the one hand, diversity and differences exist in Western understandings of sustainable tourism; on the other, Chinese culture is not simply the opposite to others, but rather there is a huge flow of ideas between East and West in practice.

Ideology is used to analyse how knowledge and beliefs are determined within societies or cultural contexts (Edgar and Sedgwick, 2007). However, this does not mean there are no differences and contradictions within a certain ideology. For example, postmodern theory seeks to discover universal knowledge while postmodern deconstruction theory focuses on collective knowledge (Kahn, 1999), even though both were developed in Western ideology. The understanding and production of knowledge varies between different epistemological systems (positivism, interpretivism, constructivism, and so on). As discussed in Chapter Five, social scientific knowledge is affirmed to be inherently ‘subjective’. According to Tribe (2006), ideology is one of the five (person, rules, position, ends, and ideology) force-fields which may lead tourism knowledge into different directions or interpretations. It explains the diversity and differences in understanding and interpreting sustainable tourism within the Western ideology. The diversity which is involved in more critical debates and exchange of ideas is encouraged since it is healthy for sustainable tourism research (Bramwell and Bernard, 2014).

As concluded in Chapter Eight, sustainable tourism is a contested concept that has been evolving since it was first proposed. Clarke (1997) puts forward a framework of four interpretations of sustainable tourism. The earliest was the position of sustainable tourism as a polar opposite to mass tourism, the second adjusted the polar opposite idea to one where there was a continuum between these two extremes. This was replaced by the third position which sees sustainable tourism as a goal for mass tourism by emphasising environmental management systems, while the last position states that sustainable tourism is a realisable goal for all forms of tourism. Hardy and Beeton (2001) add a further position, noting that the context of sustainable tourism has been changing over time. All these positions lead to different understandings and interpretations of sustainable tourism.
The complexity of sustainable tourism in Western ideology is reflected in the disagreements regarding its definition. As presented in Chapter Eight, definitions of sustainable tourism can be divided into broad and narrow ones according to the different views as to its relationship with sustainable development. The broad definitions are proposed by those (such as Bramwell and Lane, 1993; Sadler, 1993; Ding and Pigram, 1995; WTO, 2004) who adopt the principles of sustainable development and transfer these into the context of tourism. This basically entails emphasising the role of tourism in the broad context of sustainable development (mainly its economic contribution). This emphasis on the tenets of sustainable development may result in the compromising or even rejection of tourism development when it contradicts with the overall sustainable development of the society (Choi, 2005). This, however, conflicts with the inherent nature of sustainable tourism to develop tourism. The broad definition is also criticised as overlooking the positive impacts of tourism in respect to the protection of cultural and natural heritage and quality of life.

Other researchers (such as Wall, 1997; Butler, 1998; Sharpley, 2007.) who adopt the ideological and philosophical implications of the concept of “sustainability”, propose a narrow definition of sustainable tourism, stressing the dominance of the tourism business and tourism-centric agenda, even though it may share some of the concerns of sustainable development. They argue that sustainable tourism is not simply tourism that has developed to adopt the principles of sustainable development as one sector of society. For these scholars, not all the types of tourism can be translated into sustainable tourism by adopting the principles of sustainable development. Rather, it may be misleading to combine tourism with sustainable development, such as in the case of sustainable sex tourism (Saarinen, 2006). Another reason for the narrow definition is the view that the notion of “sustainable tourism” was first proposed (‘new tourism’ by Rosenow and Pulsipher in 1979 and ‘Destination Life Cycle Model’ by Butler in 1980) prior to the original presentation of the term “sustainable development” in 1987 (Hardy, Beeton and Pearson, 2002). It has to be noted, however, that the broad and narrow definitions do not necessarily directly conflict with each other but can be seen as correlated.

Apart from the broad and narrow definition, there are still other researchers (Hunter, 1997; Clarke, 1997; Sharpley, 2000; Weaver, 2006) who reject the idea of a clear unified definition of sustainable tourism but deem it to be a destination-specific concept that therefore should be defined on a case-by-case basis. Sustainable tourism is seen by these
scholars as an adaptive paradigm that allows for different interpretations under different circumstances (Hunter, 1997), and they argue that the correct direction to sustainable tourism is more important than a consensus definition since the concept evolves with the change of context (Clarke, 1997). In other words, the application and evaluation of sustainable tourism cannot be achieved by a universally agreed definition but by whether the principles of sustainable tourism are in fact satisfied. This approach emphasises that interpretations of sustainable tourism are necessarily based on different ideologies, approaches and cultural values and that singular definitions inherently exclude views that may be valid in their particular contexts (Robinson, 2004).

There are also other perspectives that can reflect the complexity of the interpretations of sustainable tourism. According to Saarinen (2006), different traditions on the limits of growth lead to an emphasis on different aspects of sustainable tourism (e.g. the resource-based tradition emphasises the maintenance of tourism supporting resources, the activity-based tradition emphasises the economic benefits, and the community-based tradition the social benefits). By adopting the classification of interpretations of sustainable development from very strong to very weak by Turner, Pearce and Bateman (1994), Hunter (1997) categorises the interpretations of sustainable tourism in such a way as to present the anthropocentric and utilitarian as weaker, and the ones based on quintessentially Western environmentalism as stronger.

According to Chapter Five, knowledge is constructed based on culture and values. As Chambers and Buzinde (2015) claimed, it is not necessary to place Western knowledge and non-Western knowledge in opposition to each other since each can benefit from communication and interconnectivity with the other. Furthermore, geographical location does not imply the same epistemological location (Grosfoguel, 2007): there are similar epistemological understandings of sustainable tourism to Chinese ones within Western societies. With economic globalisation, the broader lines of cultures are gradually fading out. The hybridity of knowledge beyond culture is advocated as adapting to globalisation (González, 2005). This hybrid epistemology is advocated as rejecting the binary one which opposes Orientalism to the West (Frenkel and Shenhav, 2006). The concept of hybridity has been drawn into tourism as a way of gaining a better understanding of tourism phenomena based upon cultural proximities and differences (Amoamo, 2011). In fact, the reconceptualisation of sustainable tourism in this study should be considered as a
hybridisation of Chinese and Western cultural interpretations rather than a binary opposition between them.

Some critical researchers (both Western and non-Western) have noticed the limitations of understanding and applying sustainable tourism based on the dominant Western ideology, and so encourage interpretations that involve multiple approaches, worldviews and cultures (Carvalho, 2001). Since sustainable tourism has roots in moral and ethical reflexivity as to how tourism should be developed (Bramwell and Bernard, 2014), its limitations are not only practical but also ethical (Duffy, 2002). As claimed by Muller (1994), the prevalent hedonistic philosophy in Western societies may be argued to be one reason for the difficulty of achieving sustainable tourism. Hughes (1995) argues that the dominant technical and scientific approaches to the study of sustainable tourism result in the overlooking of its ethical basis, while Robinson (1999) indicates that cultural issues are neglected in sustainable tourism studies, especially the man-environment relationships determined by cultural difference and the actions determined by cultural values.

The reconceptualisation of sustainable tourism in the light of Confucianism and Taoism highly stresses the importance of ethics and virtue. Similar statements can be found in Western interpretations, for example Fennel’s (2002) claim that sustainable tourism is a process of the application of ethics. Codes of good practice (see, for example, ETB, 1991; Countryside Commission, 1991; Green, 1990) that have been developed are very similar to the requirement of virtuous practice in the reconceptualisation. Deep Ecology, as developed in Western societies, stresses the importance of ethical transformation of the human-nature relationship in order to achieve sustainable tourism (Devall, 1985; Naess, 1988). This accords with the Confucian and Taoist environmental ethics that reject the Western anthropocentric beliefs. The concept of environmental harmony (Farrell and McLellan, 1987) and “harmonious relationships between the visitor, the host community and the place” statement of the principles of sustainable tourism, as developed by the English Tourist Board (1991) are coincident with the application of Confucian value He (Great Harmony) in the reinterpretation of sustainable tourism.

Farrell and Twining-Ward (2005) attempt to understand sustainable tourism in the context of complex system dynamics. This is similar to the interpretation that sustainable tourism is to achieve the Great Harmony in the tourism system. The emphasis that sustainable
tourism is not a fixed state of harmony within the tourism system but accepts changes and diversity can also be reflected in the famous Brundtland Commission Report (WCED, 1987). The concept of reciprocity, which encourages the stakeholders to think about responsibility (Halpern et al., 2004), could be considered as another name for the Confucian value Shu (Empathy). Clarke (1997) claims that it is more important to make sure tourism is moving towards the correct direction (sustainability) than to propose a precise definition of sustainable tourism. This is consistent with the reconceptualisation of “The Way of Sustainable Tourism” which stresses the direction of sustainability. The modified principles of sustainable tourism include both the Chinese ones and the ones shared with Western discourse. The proposed reconceptualisation is therefore a hybridization of Chinese and Western cultural constructions of knowledge of sustainable tourism, rather than

9.6 Conclusion

The concept of sustainable tourism has been identified as having been interpreted mainly by Western scholars due to the context in which it originated. Seven principles of sustainable tourism have been synthesised based on Western interpretations. These principles reflect four core issues in sustainable tourism: the environmental ethics, the benefits of stakeholders, the long-term consideration for the future, and the relationships between stakeholders. The analysis of these principles demonstrates the deficiency of Western values in underpinning them (the anthropocentric environmental ethics, the individualism which stresses personal rights and freedom, etc.). In contrast, the Confucian and Taoist values which stress non-anthropocentric environmental ethics, responsibility, and actions consistent with moral rules, have the potential to remedy this deficiency. Although the Confucian and Taoist values are not suitable for translating into principles individually, their suggestions on sustainable tourism are able to be summarised. Eight principles are developed based on the seven principles synthesised in Chapter Eight, and the suggestions of the Confucian and Taoist values on sustainable tourism. These eight principles take both Western and Chinese cultural values into consideration. A reconceptualisation of sustainable tourism in the light of Confucian and Taoist values is thereby created.
Chapter 10 Conclusions

10.1 Introduction

This chapter is the final chapter of the thesis and summarises the study as a whole. First of all, it revisits the aims and objectives of the study and explains how they are achieved. Secondly, the contributions of the study are demonstrated from the two perspectives of the “critical turn of tourism studies”. Study One (the theory of conceptual research) contributes to the “methodological turn” and Study Two (the reinterpretation of sustainable tourism in the light of Chinese cultural values) contributes to the “cultural turn”. Thirdly, the limitations of the research are evaluated and the inspirations for future research are proposed. Then the author reflects on the process of the research as the ending point of the thesis.

10.2 Revisit aims and objectives of the study

As a conclusion chapter, it is necessary to revisit the aims and objectives of the study and evaluate whether and how they are realised. As stated in the previous chapters, this study is somewhat different from conventional doctoral research. It does not follow the existing research methods or paradigms to investigate new proposed research questions, but engages with a new research strategy including the theory and practice. There are two aims and four objectives of the study.

Aims:
1. the theory of conceptual research, to explore the meaning of conceptual research and how it is carried out in tourism
2. the practice of conceptual research, to reinterpret sustainable tourism in the light of Confucianism and Taoism

Objectives:
1. To clarify what conceptual research is and how it is carried out in tourism
2a. To analyse Confucianism and Taoism and their values
2b. To analyse the concept of sustainable tourism
2c. To reinterpret sustainable tourism in the light of Confucianism and Taoism
The research is divided into two studies. Study One is the theory of conceptual research, which responds to aim 1 and objective 1. Aim 1 and objective 1 originated from the process of searching for a proper research method for the initial research question, i.e. to generate a Chinese understanding of the concept of sustainable tourism. It was found that the popular research methods used by quantitative and qualitative research, such as questionnaires, interviews, case studies, ethnography, and so on, are not suitable for this research question. The author noted that the objects of this study are concepts, and the research question cannot be answered in a traditional empirical way, using quantitative or qualitative methods. The research concentrating on concept(s) was found to have been rather overlooked in methodological studies. The initial aim of the study (to generate a Chinese interpretation of the concept of sustainable tourism) indicated that it is a kind of conceptual research. In order to realise that aim (aim 2), therefore, another aim (aim 1) was proposed to explore the meaning of conceptual research and how it is carried out; this was defined as Study One.

In order to have a basic understanding of conceptual research, methodological studies on conceptual research were examined (Chapter Two). The rationale of conceptual research was found to derive from the limitations of empirical research which could be concluded as being non-reflective and less creative. By interrogating the existing methodological literature, the defining parameters of conceptual research were summarised as attempts to clarify the concepts systematically, investigate the origin, development, meanings and uses of these concepts, develop new concepts or reinterpret existing ones (Dreher, 2000, 2003; Leuzinger-Bohleber and Fischmann, 2006; Kothari, 2008; Wallerstein, 2009).

In order to have a better understanding of conceptual research and how it is carried out, especially in tourism, conceptual research that has been done in tourism was identified on and analysed (Chapter Three). Published journal articles on tourism were used as the data for analysis, and content analysis was adopted as the research method. The data was collected from the CABI (www.leisurtourism.com) abstracts database, CABABS. The search code UU700 (the tourism and travel code) was applied to the database as a filter in order to narrow the search to the tourism realm only. Then a variety of different terms which might be used in conceptual research were used as key search words in CABABS to provide data from tourism entries. Two periods of equal length (1981-1995 and 1996-2010) were chosen to identify both the total situation of conceptual research in tourism and to probe the developing trend of it. A sample of 471 articles was determined in order to estimate the situation for the whole
population. A careful inspection was made of the 471 articles, one-by-one, to judge whether they were conceptual research articles or noise. If an article was found to be conceptual research, it was further judged as to whether it was pure or partial. Conceptual research was found to only account for 4.17% of the total, thus illustrating that conceptual research is somewhat overlooked in tourism research academia.

The qualitative content analysis developed a possible typology of the popular issues presented in conceptual research by analysing 46 pure conceptual research articles. Twelve themes that capture the main elements of conceptual research were developed. These twelve themes could be considered as twelve conceptual research approaches which demonstrate how conceptual research could be carried out. Ten key tourism concepts in classic conceptual tourism articles were analysed in detail to test the application and effectiveness of the twelve conceptual research approaches. Based on the discussions and analysis, conceptual research in tourism was defined, thus achieving aim 1 and objective 1.

Study Two is the practice of conceptual research with the aim to reinterpret the concept of sustainable tourism in the light of Confucianism and Taoism following the conceptual research approaches developed in Study One. Objective 2a corresponded to Chapter Six and Chapter Seven with the analysis of Confucianism and Taoism and their values. With the adoption of theme one, Defining concepts, what Confucianism is and what Confucianism is not were discussed. With the application of theme three, Historical analysis of concepts, the origins, development and evolution, as well as the rejection and renaissance of Confucianism in modern times were presented. By using theme nine, Synthesising concepts, eleven Confucian values: 仁 ren (Humanity/Benevolence), 义 yi (Righteousness/Justice), 礼 li (Propriety), 智 zhi (Knowledge and Wisdom), 信 xin (Trustworthiness), 悔 shu (Empathy), 忠 zhong (Loyalty), 孝 xiao (Filial Piety), 修己 xiuji (Self-cultivation), 长远观 changyuan guan (Long-term Orientation) and the ultimate target value 和 he (Great Harmony) were induced and integrated.

Similarly, with the adoption of theme one, Defining concepts, Taoism was defined for the purposes of this study. With the application of theme three, Historical analysis of concepts, the origins, the development of Taoism, as well as its relationship with Confucianism and Chinese Buddhism were presented. By using theme nine, Synthesising
concepts, three Taoist values, 道 Tao/Dao (The Way), 阴阳 YinYang (Yin and Yang) and 无为 Wu Wei (Inaction/No-action) were induced and integrated. This realised objective 2a.

Chapter Eight concentrated on the existing knowledge of sustainable tourism and thus corresponded to objective 2b. Theme three, Historical analysis of concepts, was used to explore the concept of sustainable tourism with regards to how it originated and evolved based on its parental concepts: development and sustainable development. Theme one, Defining concepts, critically discussed and evaluated different definitions of sustainable tourism, and the range of sustainable tourism with regards to the relationship and differences between sustainable tourism and sustainable tourism development. Theme seven, Deconstructing concepts, indicated the cultural and philosophical bias in the interpretations of the concept of sustainable tourism. Theme nine, Synthesising concepts, summarises the principles of sustainable tourism based on the relevant literature in order to compare with the Chinese cultural values.

Chapter Nine was developed to realise objective 2c. With the adoption of theme ten, Translating concepts to new contexts, the Confucian and Taoist values were translated to the understanding of sustainable tourism. An analysis of how the Confucian and Taoism values can be integrated into the concept of sustainable tourism was performed and this was compared and contrasted with the existing principles of sustainable tourism. A reconceptualisation of sustainable tourism in the light of Chinese cultural values was proposed by following theme twelve, Proposing new concept/Reconceptualisation.

10.3 Contributions of the study

10.3.1 Contribution to the methodological turn

The first contribution of this study is to the “methodological turn” of tourism research. As discussed in Chapter Two, conceptual research is an existing research strategy but it has been somewhat overlooked in the methodological studies. Although some authors have characterised their papers as conceptual research there is no clear definition and clarification of conceptual research as a special research strategy. Many authors may not know the research they are doing are conceptual research or lack of knowledge of the procedures on how to carry out conceptual research.
Study One clarifies conceptual research by analysing the relevant literatures. Conceptual research not only attempts to widen the narrow framework of a clarification of concepts solely determined by logic, but also closely related to the (philosophical) analysis of the use of a concept. It is able to support the integration of the experiences of practitioners into knowledge in a systematic way. Conceptual research clarifies the analytic assumptions that bring to the fore the contrasts and oppositions between different analytic perspectives and their fundamental differences with non-analytic ones. Also conceptual research concerns about the ideology or value systems in order to be critical and objective. Not all the non-empirical research is conceptual research. Non-empirical research is broader than just conceptual research and can include literary research, historical research, and philosophical research and so on. Conceptual research not only attempts to review historical issues of concept(s), but seeks to undertake a logical clarification of concepts and analysis of the use of a concept. The relationship between philosophical research and conceptual research though, is much closer particularly in the analytic tradition where the major focus is on the analysis of concepts. Conceptual research is neither the same as historical research nor a branch of qualitative research. It is neither an opposite term to empirical research nor synonymous with non-empirical research.

This study clearly proposed the definition of conceptual research in tourism which is “a set of activities that focus on the systematic analysis and profound understanding of tourism concepts. Research can cover the antecedents, origin, history and development of the concept as well as its current use, facets, controversies, applications, characteristics and idiosyncrasies, points of differentiation, discourse and ideological analysis and deconstruction. Its major outcomes include the clarification of a concept, the proposing of a new concept, the modification of an existing one (reconceptualisation) or ideological or other critique.” This is the first definition of conceptual research in tourism studies. It helps tourism scholars to have a clear understanding of conceptual research.

Additionally, the twelve themes (Defining concepts, Comparing concepts, Historical analysis of concepts, Constructing conceptual typologies, Mapping the scope of concepts, Exploring the purposes of concepts, Deconstructing concepts, Applying concepts to practice, Synthesising concepts, Translating concepts to new contexts, Finding conceptual gaps, Proposing new concept /Reconceptualisation) which indicate how conceptual research can
be carried out were developed. It offers insights for those who interested in doing conceptual research and is not limited to the tourism realm but also a contribution to general methodological studies.

What is more, the quality critique of conceptual research was presented. These are first good scholarship and this entails the ability to execute a comprehensive and rigorous literature review and to weigh and sift evidence. Second, is the need for what might be termed soft falsification or concept scepticism. Third, rhetoric is crucial and this requires attention to structure, logic and plausibility of the argument presented. Fourth, triangulation and proximity require that the conceptual contribution relates to and maps against established neighbouring concepts. Fifth, validity here means that the results are consistent with the problem that initiated the research. Sixth, transparency requires that the process by which the results were obtained is clear and carefully documented. Seventh, usefulness means that the results add to human understanding. Eighth, the requirements of additionality and revelation demand that the results of conceptual research make something visible that was previously not so. Ninth, given the subjectivist nature of conceptual research, an element of reflexivity, to understand the influence of the self on knowledge construction, is necessary.

The publish of Study One with the title of “Conceptual Research in Tourism” in Annals of Tourism Research (Vol. 41, pp. 66–88, 2013) suggests the value of the study. The 58 citations of the journal article (see Google Scholar) since it has been published indicates the impact of this original contribution. What is more, the adoption of the conceptual research approaches (twelve themes) by researchers demonstrates the value of the study. For example in Ram, Nawijn and Peeters’s paper (2013, Happiness and limits to sustainable tourism mobility: a new conceptual model, Journal of Sustainable Tourism, Vol.21 (7), pp. 1017-1035), they adopted theme nine Synthesising concepts and made a synthesis of the concept of happiness from different disciplines using a literature review. They then applied theme ten Translating concepts to new context and extended the concept of happiness to the context of mobility. Another example can be found in Xue, Manuel-Navarrete and Buzinde’s article (2014, Theorising the concept of alienation in tourism studies, Annals of Tourism Research, Vol.44, pp.186–199) which used theme one Defining concepts to define alienation and theme three Historical analysis of concepts to trace the historical development of alienation in social sciences. They further discussed the applicability of the concept of alienation to tourism scholarship with the adoption of theme ten Translating concepts to new context.
10.3.2 Contribution to the cultural turn

The second contribution is to the “cultural turn” of tourism research by addressing Chinese cultural values in tourism knowledge creation in contrast to the Western values. As discussed in Chapter One, tourism knowledge production is criticised to rely too much on Western values which are Anglocentric and Eurocentric, with a crucial role played by the tourism’s academic gatekeepers who determine the scope and direction of tourism knowledge. Although tourism, as a field of study is considered as demonstrating a notable “critical turn” in recent years with the evidence of several books and journals published in response to this trend, the cultural turn is not really as optimistic as it seems to be. Recent research indicates that tourism knowledge production is still Anglocentric and Eurocentric and dominated by researchers from the developed world while voices from the developing countries are suppressed. This study redressed this issue. Findings of a historical analysis of published articles in three leading tourism journals Annals of Tourism Research (ATR), Tourism Management (TM), and Journal of Travel Research (JTR) from 1986 to 2012 indicate an overlooking of Chinese value-based voices and a positive growing trend. This part was developed to be a paper with the title of “Cultural Turn of Tourism Studies: The Chinese Voice” and successfully presented at International Critical Tourism Studies Conference V, June 25th – 28th 2013 in Sarajevo.

Similar as the situation of the whole tourism research, current concept and theories of sustainable tourism are generally created based on Western values. More research on sustainable tourism should cover prominent thematic concerns within the “critical turn”, through the use of “critical” assessments that draw on general social science approaches, theories, and concepts (Bramwell and Lane, 2014). Study Two perfectly meets this call. The concept of sustainable tourism was linked with two representative Chinese cultural values Confucianism and Taoism. It offered a different understanding and interpretation of sustainable tourism apart from the dominant Western ones. Based on the discussions, the concept of sustainable tourism in the light of Confucianism and Taoism can be reconceptualised as “The Way of Sustainable Tourism” and defined as: “the virtuous practice of tourism as part of the greater harmony between people and the planet so that tourism contributes to this greater harmony and virtue. The economic, social and environmental impacts are moderated by tourists’ empathy and love for host communities and the
environment. It requires stakeholders to cultivate and practice the principles of sustainable tourism enlightened by Confucian and Taoist values”.

Eight principles of sustainable tourism which take both Western and Chinese cultural values into consideration were developed: Principle One Respect the value and right of nature by rejecting the Western anthropocentric environmental ethics; Principle Two Limit the demands of present and future tourists; Principle Three Create virtuous planning and policies with the long-term consideration of future tourism; Principle Four Make good use of environmental tourism resources through natural conservation and management; Principle Five Balance the environmental, economic and social impacts of tourism by considering the benefits of tourists, host communities and the environment; Principle Six Develop codes of conduct for all the stakeholders according to the principles of sustainable tourism; Principle Seven Encourage the stakeholders to increase their awareness of the principles and practice virtuous tourism for sustainability; Principle Eight Develop a harmonious relationship with and between the tourism environment and its stakeholders.

Study Two sets an example for non-Western researchers to generate tourism knowledge which embraces multiple worldviews and values. Actually, this is not limited in tourism but all the disciplines in social science. This part has been presented at *7th World Conference for Graduate Research in Tourism, Hospitality and Leisure*, 3-8 June 2014, Istanbul, Turkey. And the author is planning to make it into a journal paper in the future.

### 10.4 Limitations of the study and implications for future research

#### 10.4.1 Limitations of Study One (the theory of conceptual research part)

The first limitation of Study One is the limitation of the research method used in Chapter Three. As indicated in section 3.3.4, in generating the population, some articles (those with the keywords in the main body of their texts, those without limited proxy terms, those classified under other social science disciplines, and those in non-English publications) may have been missed. The quantity of the population cannot be accurate due to some articles containing more than one term that may be counted twice or more, and “Noise” (articles that contain the proxy terms but are not relevant papers) are difficult to clear away. Also, since the data used was sourced from journals it excluded conceptual research published in books, such as the seminal concept of the tourist gaze (Urry, 1990). Future research should take conceptual research published in books into account.
Apart from the limitations listed in the methodology, this study did not undertake a detailed discussion of the methods for conceptual research. The twelve themes developed in the study should be considered as a fuzzy typology, which present how conceptual research can be carried out. Future research directions might, therefore, wish to consider in more detail the research methods for conceptual research. Since this study is the initial research on conceptual research in tourism, further research can be done to improve the understanding of conceptual research in terms of definition, clarification and application.

10.4.2 Limitations of Study Two (the practice of conceptual research part)

The first limitation of Study Two originates from the limitations of conceptual research itself. As a practical application of conceptual research, it inevitably has the limitations listed in section 2.10. For example, the lack of clear quality criteria for conceptual research or in other words it is difficult to evaluate how good or bad the research is. Another problem is that insights gained in this study need to be “translated” or “transferred” to the empirical situation of sustainable tourism, and deviations may occur in the translation or transformation process. The analysis of the concept of sustainable in the light of Confucianism and Taoism does not fall within a precise coding but remain uncertain and vague intellectual tools. Future research may develop detailed conduct codes for sustainable tourism with the consideration of Chinese cultural values.

The second limitation of Study Two can be attributed to the translation, interpretation and synthesis of Confucianism and Taoism, since the researcher is not an expert in Chinese culture, even though he was born and grew up in the context. The existing literature on Chinese culture does not offer a clear summary of Confucian and Taoist values. It was very difficult for the author to construct this from both the esoteric classical works and the subsequent critical literatures. More research needs to be done to improve this aspect of the study in the future.

The third limitation of Study Two is the challenge of interpreting Confucianism and Taoism to non-Chinese people, especially Western readers who have quite different values and ideologies from the Chinese. It is difficult for the author to make sure Western readers
accept the knowledge created based on Chinese cultural values, or at least that they are not sceptical of it.

10.5 Reflection

As a doctoral study which lasts for four years, it is necessary to reflect on what I have learned from it. This reflection is divided into two perspectives: the research experience and the life experience. From the research perspective, it was a fantastic learning experience, especially in terms of relating my subject interest in sustainable tourism to my personal interest in Chinese culture. It was a good opportunity to study on a specific topic deeply, profoundly and in detail. The study offered me a better understanding of what research is and how to conduct a piece of research in a proper way. It not only increased my knowledge on tourism knowledge creation, conceptual research, culture and values, Confucianism and Taoism, sustainable tourism, but also on research methods and research tools. What is more, I learned how to deal with the research parts that I am not good at and to overcome the challenges that I came across in the research process. All these will be very useful in my future research career.

From the life perspective, it was a memorable and important experience in my life. The first two years went on very well when passion and motivation was high. The process of the research went on fast with the completion of Study One. I successfully passed the Confirmation viva and got an article published in a top tourism journal as well as presented at international tourism conference. However, there is not only happiness in life. The last two years were tough times for me. I had to take temporary withdrawals from the study because of unexpected accidents and health problems. This not only caused interruption to the study, but also de-motivation and depression. I experienced lots of pains to get over these challenges. This strengthened my willpower, however, and taught me to make better plans for long-term projects. I will benefit from this experience in the rest of my life.
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### Appendix: The Key Confucian and Taoist Terms in Chinese and English

<table>
<thead>
<tr>
<th>Chinese Character</th>
<th>Chinese Pronunciation (pin yin)</th>
<th>Pronunciation by Western</th>
<th>English Word</th>
</tr>
</thead>
<tbody>
<tr>
<td>孔子/孔夫子</td>
<td>kongzi/kong fuzi</td>
<td>Kong Tzu</td>
<td>Confucius</td>
</tr>
<tr>
<td>儒家</td>
<td>ru</td>
<td>ru</td>
<td>Confucian</td>
</tr>
<tr>
<td>论语</td>
<td>Lun Yu</td>
<td>Lun ju</td>
<td>Analects</td>
</tr>
<tr>
<td>大学</td>
<td>Da Xue</td>
<td>Ta Hsueh</td>
<td>The Great Learning</td>
</tr>
<tr>
<td>中庸</td>
<td>zhong yong</td>
<td>Chungyung</td>
<td>The Doctrine of Mean</td>
</tr>
<tr>
<td>易经</td>
<td>Yi Jing</td>
<td>i ching</td>
<td>I-Ching/Book of Changes</td>
</tr>
<tr>
<td>孟子</td>
<td>meng zi</td>
<td>Meng Tzu</td>
<td>Mencius</td>
</tr>
<tr>
<td>荀子</td>
<td>xun zi</td>
<td>Hsun Tzu</td>
<td>Hsun-tzu</td>
</tr>
<tr>
<td>仁</td>
<td>ren</td>
<td>jen</td>
<td>humanity/benevolence</td>
</tr>
<tr>
<td>义</td>
<td>yi</td>
<td>i</td>
<td>justice</td>
</tr>
<tr>
<td>礼</td>
<td>li</td>
<td>li</td>
<td>propriety</td>
</tr>
<tr>
<td>智</td>
<td>zhi</td>
<td>chih</td>
<td>wisdom</td>
</tr>
<tr>
<td>信</td>
<td>xin</td>
<td>sin</td>
<td>trustworthiness</td>
</tr>
<tr>
<td>孝</td>
<td>xiao</td>
<td>Hsiao</td>
<td>filial piety</td>
</tr>
<tr>
<td>忠</td>
<td>zhong</td>
<td>chung</td>
<td>loyalty</td>
</tr>
<tr>
<td>恕</td>
<td>shu</td>
<td>chu</td>
<td>empathy</td>
</tr>
<tr>
<td>利</td>
<td>li</td>
<td>li</td>
<td>profit</td>
</tr>
<tr>
<td>天</td>
<td>tian</td>
<td>tien</td>
<td>Heaven</td>
</tr>
<tr>
<td>己</td>
<td>ji</td>
<td>ji</td>
<td>self</td>
</tr>
<tr>
<td>君子</td>
<td>Jun zi</td>
<td>Chun Tzu</td>
<td>Gentleman/ people with moral integrity</td>
</tr>
<tr>
<td>道</td>
<td>dao</td>
<td>Tao</td>
<td>The Way</td>
</tr>
<tr>
<td>老子</td>
<td>Lao zi</td>
<td>Lao Tzu</td>
<td>Lao Tzu</td>
</tr>
<tr>
<td>庄子</td>
<td>Zhuang zi</td>
<td>Chuang Tzu</td>
<td>Chuang Tzu</td>
</tr>
<tr>
<td>阴</td>
<td>yin</td>
<td>yin</td>
<td>yin</td>
</tr>
<tr>
<td>阳</td>
<td>yang</td>
<td>yang</td>
<td>yang</td>
</tr>
<tr>
<td>无为</td>
<td>wu wei</td>
<td>wu wei</td>
<td>Non-action/inaction</td>
</tr>
</tbody>
</table>