《旅游研究方法概论》课程教学大纲

Outline for Introduction to Tourism Research

一、课程基本信息（Basic information for course）

课程代码(Code)：20080262

课程名称(name)：旅游研究方法导论(Introduction to Tourism Research)

课程类型（Course type）： 专业选修（Selective in Tourism Management）

学时（Hours）：32

学分（Credits）：2

考核方式（Examination）：开卷(Open book)

二、课程简介

本课程介绍并要求学生掌握旅游研究的基础概念，包括有关专业术语、研究范式、数据来源、定性分析、定量分析及研究论文的写作基本要求，知道英语研究论文的 APA 写作要求。

Students should master the basic concepts , terms ,paradigm, data source, qualitative analyses , quantitative analysis and basic skill for report of Tourism Research , and knowing the general requirement for academic papers in APA。

三、课程性质与教学目的

课程性质（Course type）： 专业选修（Selective in Tourism Management）

教学目的(Objectives)：

1. 了解旅游研究的地位与作用及中国旅游业的巨大成就(The role of tourism research great achievement of China tourism industry)；

2．旅游研究范式(Theoretical paradigm underpinning tourism research)；

3．旅游研究数据来源（Data and empirical material sources for tourism research）；

4．旅游研究范式(The ethics of tourism research)；

5．旅游研究方法常识（Methodological consideration for tourism reserch）

6． 定性旅游研究(Qualitative methods and tourism research)

7．旅游经验数据解释/构建的方法(Qualitative methods of empirical material interpretation/(re)construction)

8．旅游定量研究(Quantitative methods and tourism research)

9．旅游研究标书与报告写作(Tourism research proposals and reports)。

四、教学内容及要求(Content and requirements)

Chapter 1   the Role of Research in Tourism

Objectives:

After studying this chapter, the students should be able to:

Discuss the nature of tourism as a discipline

Understand the role of research in tourism

Distinguish between the various types of research

Outline the steps involved in research process

Identify the phases of the writing process as applied to tourism research.

Key knowledge: Understand the role of research in tourism; Distinguish between

the various types of research
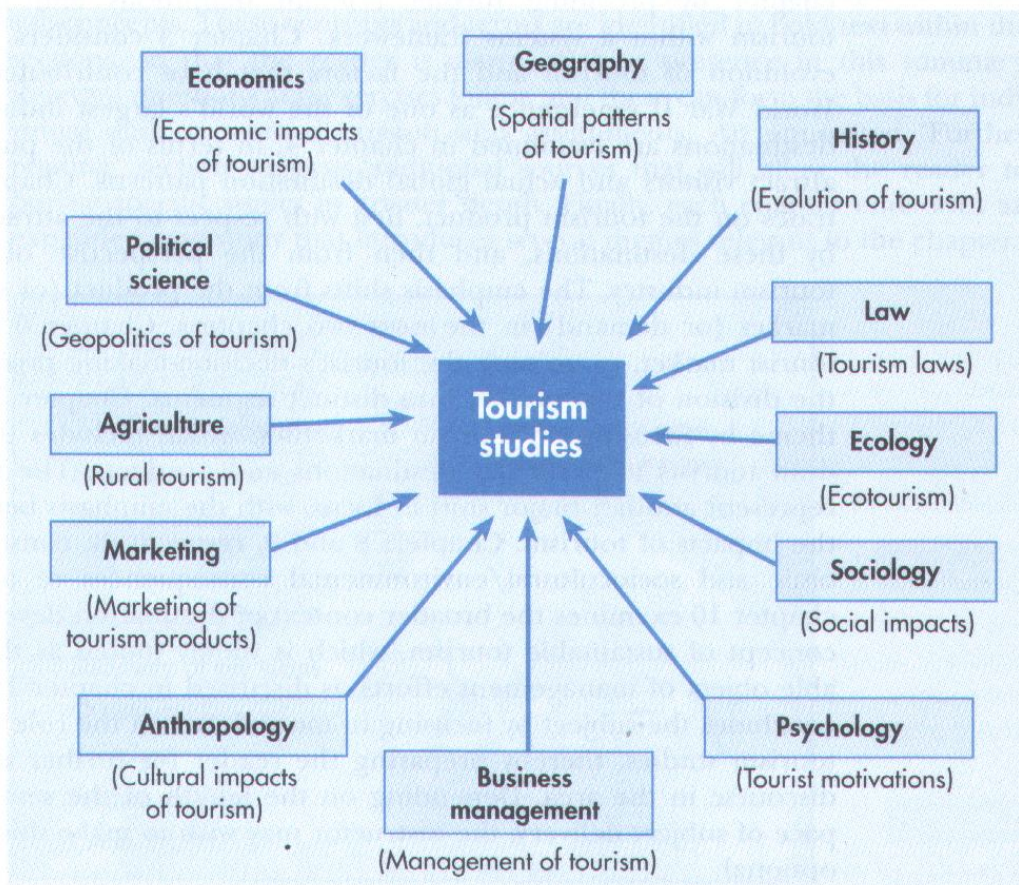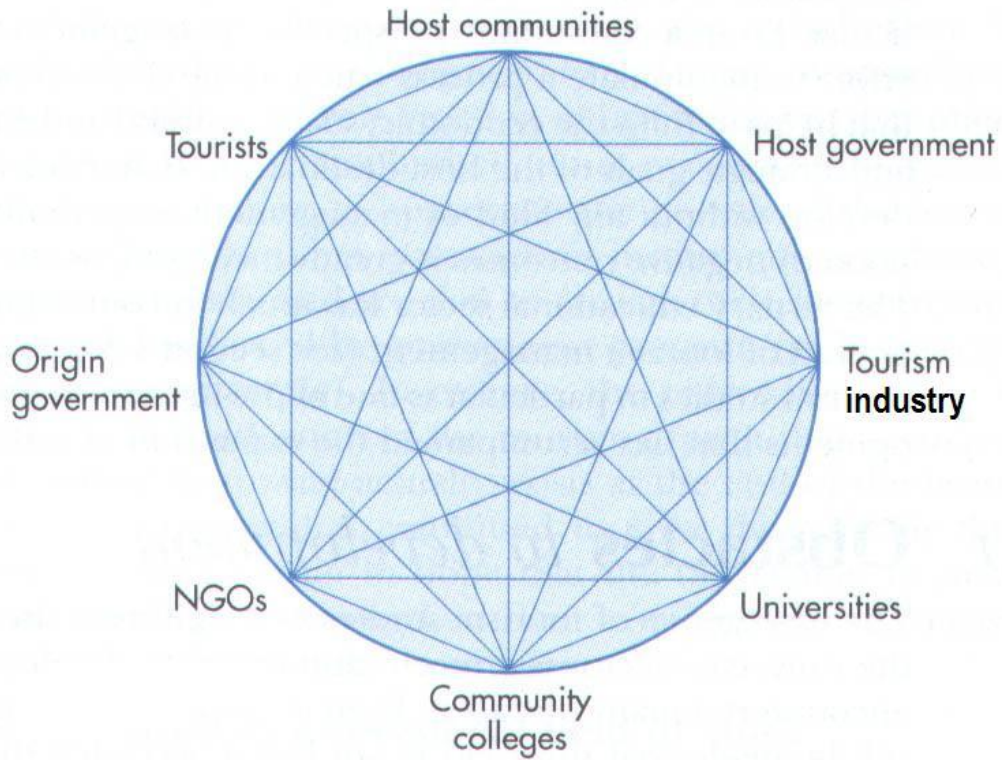
Basic Whole Tourism System

★ **At least one tourist**

★ **At least one tourist-generating region**

★ **At least one transit route region**

★ **At least one tourist destination**

★ **A travel and tourism industry**

Source: *Leiper (1995)*
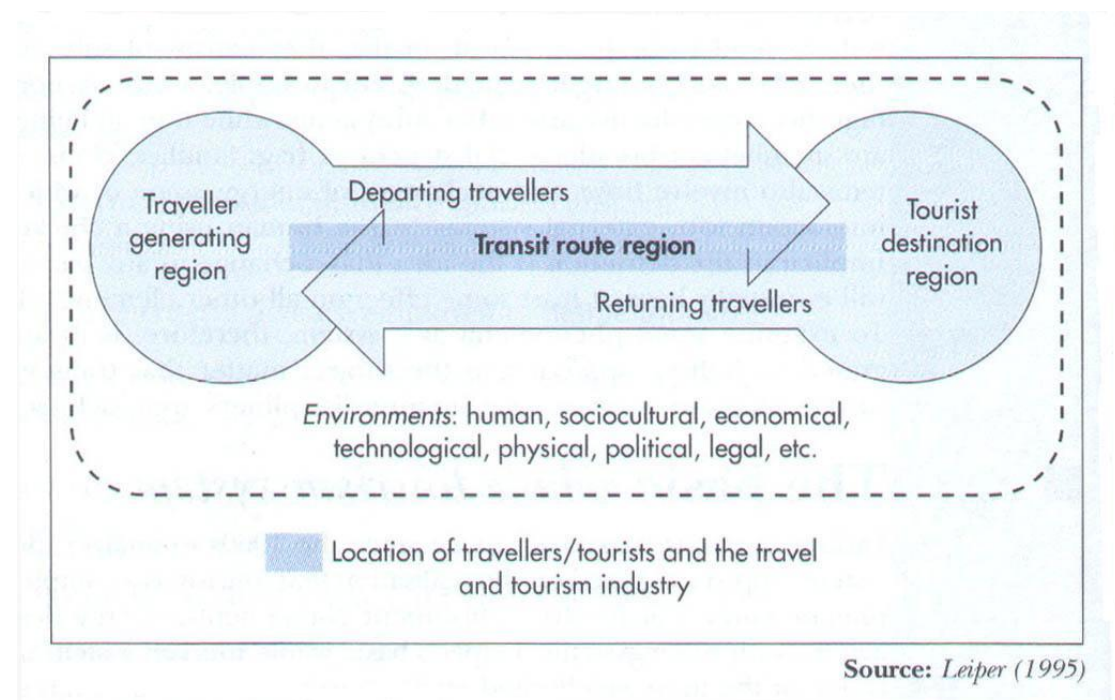
Definition of Tourism
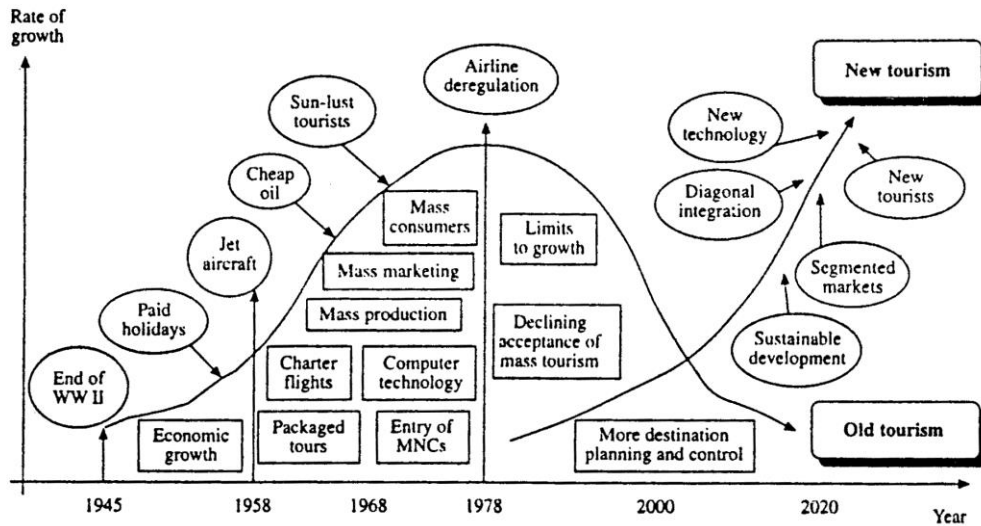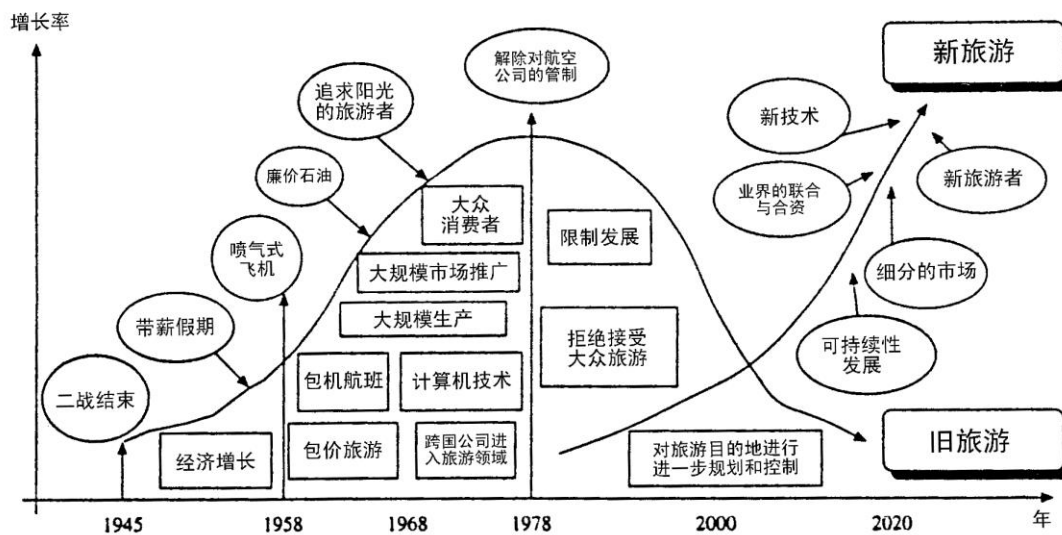
(Stakeholders System)

TOURISM may be defined as the sum of the processes, activities, and outcomes arising from the interactions among tourists, tourism suppliers, host governments, host communities, origin governments, universities, community colleges and non-governmental organizations, in the process of attracting, transporting, hosting and managing tourists and other visitors.

Host communities

Tourists

Host government

Origin
government

Tourism
industry

NGOs

Universities

Community
colleges

Economics

(Economic impacts
of tourism)

Geography

(Spatial patterns
of tourism)

History

(Evolution of tourism)

**Political
science**

(Geopolitics of tourism)

Law

(Tourism laws)

Agriculture

(Rural tourism)

**Tourism
studies**

Ecology

(Ecotourism)

Marketing

(Marketing of
tourism products)

Sociology

(Social impacts)

Anthropology

(Cultural impacts
of tourism)

**Business
management**

(Management of tourism)

Psychology

(Tourist motivations)

The tourism life cycle. *Source*: Poon (1993).

A Sequence of Tourism Platform

Jafari (2001) has identified four tourism platforms, or perspectives, that have dominated the field of tourism at various stages of its development and continue to influence the field today.

★ **Advocacy platform/perspective (拥护提倡型理论平台)**

★ **Cautionary platform/perspective (小心谨慎型理论平台)**

★ **Adaptancy platform/perspective (改变适应型理论平台)**

★ **Knowledge-based platform/perspective (以知识为基础的理论平台)**

★ **Advocacy platform/perspective (拥护提倡型理论平台)**

Tourism is an inherent benefit to communities that should be developed under free market principles. This platform can be described as an "anti-management" perspective, which assumes that tourism is an inherently positive force best left to its own – the role of government, if any, is to facilitate the growth of tourism through the passing of pro-tourism legislation and by maintain law and order.

Cautionary platform/perspective (小心谨慎型理论平台)

A reaction to the advocacy platform that stresses the negative impacts of tourism and the consequent need for strict regulation. This platform is a management perspective that perceives tourism to be an inherently destructive force that has to be strictly controlled or avoided altogether.

Adaptancy platform/perspective (改变适应型理论平台)

A follow-up on the cautionary platform that advocates alternative forms of tourism deemed to be more appropriate than the mass tourism fostered by the advocacy platform. In alignment with the cautionary platform, adaptancy platform introduced and articulated concepts that were conceived as more regulated and small-scale alternatives to mass tourism, such as alternative tourism and ecotourism.
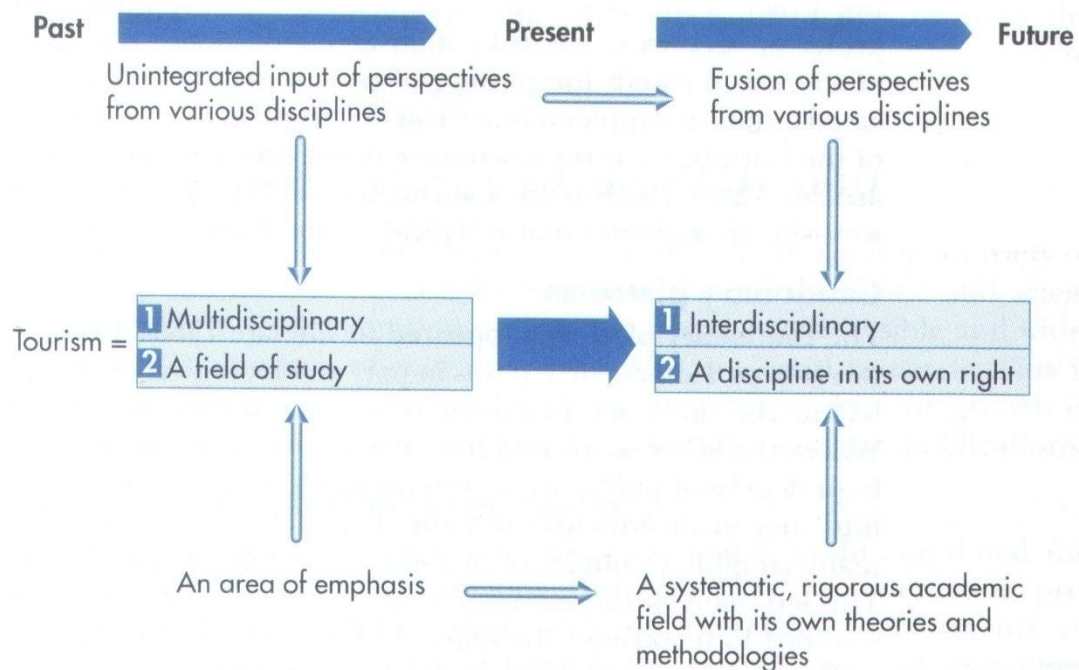
Knowledge-based platform/perspective (以知识为基础的理论平台)(scientific decision for public administration)

The most recent dominant perspective in tourism studies, emphasizing ideological

neutrality and the application of rigorous scientific methodologies to obtain knowledge so that communities can decide whether large-scale or small-scale tourism is most appropriate. Effective management decisions about this complex tourism system are based not on emotion or ideology, but on sound knowledge obtained through the application of the scientific method and informed by relevant models and theories.

Academic Discipline

★ **Indigenous theories**

★ **Multidisciplinary approach**

★ **Interdisciplinary approach**

Past	→ Present	→ Future
Unintegrated input of perspectives from various disciplines	→	Fusion of perspectives from various disciplines

Tourism =

1 Multidisciplinary
2 A field of study

→

1 Interdisciplinary
2 A discipline in its own right

An area of emphasis → A systematic, rigorous academic field with its own theories and methodologies

Industry Sectors

and Research Needs

Tourism Attractions

(natural site and event; cultural site and event)

★ destination (attraction) images

★ the competitiveness of a tourism product

★ the quality of the service delivery by staff

★ site visitation pattern

★ the quality of educational components offered during a tourism experience

★ current and potential target markets

★ social, cultural, environmental and economic impact assessments

★ the location of a tourism product in the destination life cycle

★ strategies for future planning and marketing, or an understanding of the

consequences of legislative and statutory changes

The Transport Sector

★ the development and evaluation of pricing strategies

★ the determination of demand elasticities, income and price elasticities

★ data regarding quality control

★ scheduling

★ safety and security issues

★ usage trends and patterns

★ customer expectations and satisfaction

★ seasonality impacts

★ environmental and social impacts

★ target markets

★ competitiveness within the transport sector

★ management issues

★ future forecasting of transport needs

★ the effectiveness of innovations and technological advancements

The Hospitality Sector

★ quality evaluation and client needs in regard to services, amenities, facilities

and their layout

★ the functionality and aesthetics of room designs in accommodation facilities

★ an evaluation of menu changes and menu contents

★ stock control

★ health and safety issues

★ education and training requirements

★ pricing strategies

★ the effectiveness of yield management (收益管理、营收管理) techniques

★ the effectiveness of loyalty programs

★ the development and monitoring of market profiles (市场轮廓、市场概况)

★ the evaluation of marketing strategies

★ competitors and their products

★ the development and review of strategies regarding cost-efficiency (成本效益)

improvements

★ an evaluation of management and policies

★ the implications of legislative and statutory changes such as tax systems

★ **the benefits and costs of tour packaging and product clustering (产品集群)**

★ **a longitudinal （历时、纵向）knowledge of usage patterns and trends**

Tourism Bodies

★ **a destination's image**

★ **the identification of major generating regions**

★ **the identification of market segments**

★ **the development of sociodemographic profiles (特征)**

★ **the identification of community attitudes**

★ **the assessment of social, cultural, environmental and economic impacts**

★ **the resultant strategies for ameliorating (improving), amplifying, modifying or curtailing (minimizing) such impacts**

★ **the evaluation of future development needs in regard to infrastructure, superstructure, facilities and amenities**

★ **investment requirements and strategies**

Government

★ **to establish data sets to monitor incoming and outgoing visitation patterns and to keep track of residents and visitors alike**

★ **to gather data on visitor numbers and activities in order to manage natural and built environments in a sustainable way**

★ **to quantify visitor numbers and establish visitor patterns for planning and management purposes**

★ **data on visitor numbers to provide and maintain infrastructure and public**

facilities to support both local communities and visitors

★ to know about expenditure patterns to regulate or stimulate investment

★ data to determine associated taxes or to implement legislation and statutory requirements to maintain standards of construction and/or quality of life for residents or tourists

★ data on visitor numbers to provide and maintain infrastructure and public facilities to support both local communities and visitors

★ to know about expenditure patterns to regulate or stimulate investment

★ data to determine associated taxes or to implement legislation and statutory requirements to maintain standards of construction and/or quality of life for residents or tourists

★ to assess social, cultural, environmental and economic impacts

★ to determine the effectiveness of overseas advertising and promotional campaigns

Tourists

★ developing typologies in association with market segmentations and psychometric profiles

★ finding out and understanding tourists' motivations, to assist in providing quality tourist experiences, appropriate amenities, facilities and services, planning, development and maintenance of tourism spaces, and marketing campaigns
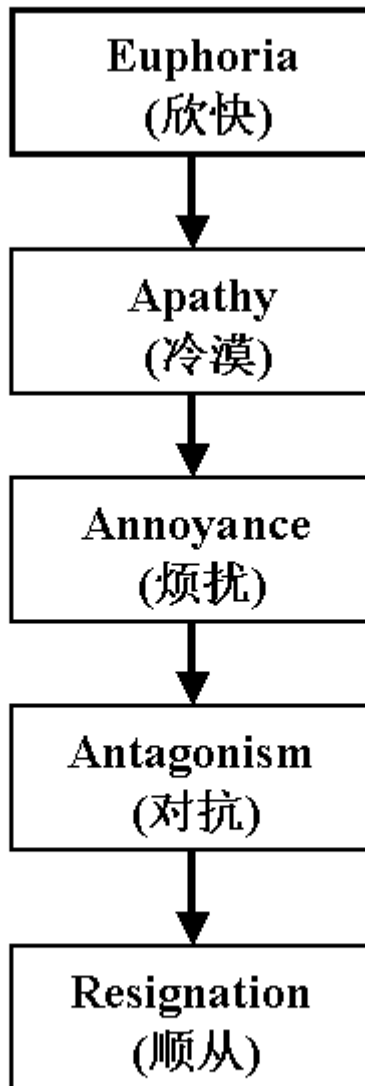
★ obtaining data on socioeconomic backgrounds, generating areas, expectations,

values and attitudes

Midcentrics

Near–psychocentrics

Near–allocentrics

Psychocentrics

Allocentrics

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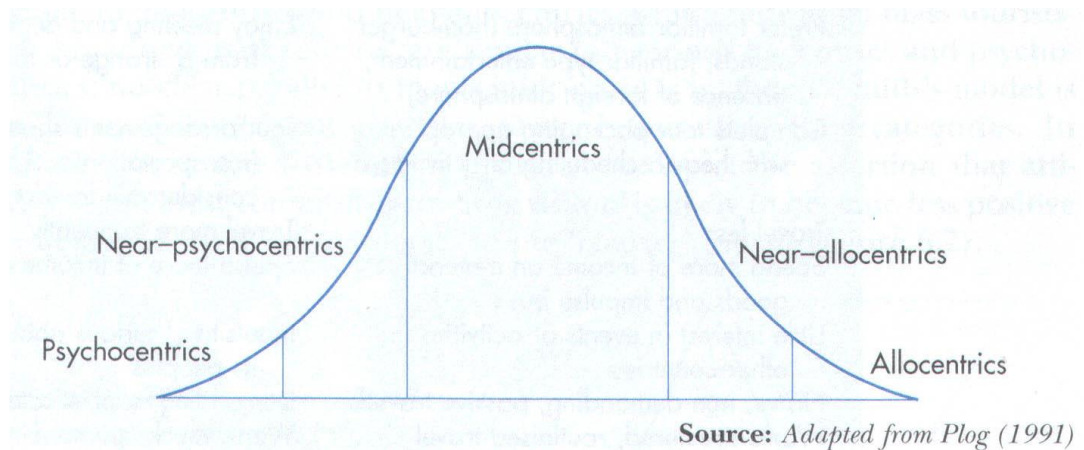
The Psychocentric- Allocentric Model; Plog's Model

- Use of personality characteristics to understand tourist travel patterns

- Continuum from allocentrics to psychocentrics

- Allocentrics- Innovators who seek out new locations and activities

- Psychocentrics- Tradition-bound travelers who prefer traditionally popular locations and experiencing commonplace activities; desire predictability in their travels

- Most travelers are somewhere in between innovators and traditionalists

- **The Community**

- **The needs for community research fall into two categories:**

- **1. Research associated with community participation in tourism planning and development**

- **2. Research to establish social and cultural impacts**

- **The community needs tourism researchers to**

- ★ **identify community attitudes to development (irridex)**

- ★ **assess social, cultural, environmental and economic impacts and develop strategies for sustainable tourism development**

- ★ **implement or review legislative requirements and inform policy development**

- **Doxey's irridex (激怒指数) is an index of resident irritation to describe the evolution of local attitudes.**

- **Irridex is a theoretical model proposing that resident attitudes evolve from euphoria to apathy, then irritation (or annoyance), antagonism and finally resignation, as the intensity of tourism development increases within a destination.**

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┌─────────────────┐
│    Euphoria     │
│     (欣快)      │
└────────┬────────┘
         │
         ▼
┌─────────────────┐
│    Apathy       │
│     (冷漠)      │
└────────┬────────┘
         │
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┌─────────────────┐
│   Annoyance     │
│     (烦扰)      │
└────────┬────────┘
         │
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┌─────────────────┐
│   Antagonism    │
│     (对抗)      │
└────────┬────────┘
         │
         ▼
┌─────────────────┐
│   Resignation   │
│     (顺从)      │
└─────────────────┘
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Stages of the Irridex

The Environment

★ environmental audits

★ the identification of preservation and conservation values

★ the conduct of environmental impact assessments

★ the monitoring of environmental impacts and amelioration (improvement)

strategies

★ **the identification of issues and the subsequent development of legislative requirements and policy development**

★ **the determination of carrying capacities, limits of acceptable change and recreational and tourism opportunity spectra**

★ **economic values such as use values associated with the environment**

★ **the identification and monitoring of attitudes to user-pays pricing strategies**

★ **the identification of issues and the subsequent development of legislative requirements and policy development**

<u>**Tourism and hospitality operators and companies**</u>

★ **information about visitor needs and wants in order to provide better services, facilities or amenities**

★ **data to maintain or improve market share**

★ **data in regard to the performance of their tourism operations in order to increase efficiencies and profits**

<u>**Special roles of tourism research**</u>

Jennings (2001) emphasized tourism and hospitality purposes:

★ **constructing and testing theory**

★ **profiling, inventory making and collecting baseline data**

★ **assessing social, cultural, environmental and economic impacts**

★ **identifying educational needs**

★ **assisting in planning and management activities**

★ contributing to monitoring and evaluation

★ providing a temporal perspective—past, present and future trends

McIntosh, Goeldner and Ritchie (1995) emphasized travel research purposes:

★ identifying problems

★ providing market information

★ minimizing operational wastages

★ identifying new profitable resources

★ facilitating sales promotion

★ fostering goodwill

Gunn (1994) emphasized tourism research approaches:

★ describing and inventory

★ testing

★ predicting, forecasting

★ modeling, simulating

Veal (1997) emphasized role of research in all levels of "rational-comprehensive

process" planning, management and policy:

★ establishing the terms of reference

★ conducting an environmental appraisal

★ consulting with stakeholders

★ setting goals and objectives

    ★ determining and assessing different action strategies

    ★ selecting the most appropriate action strategy

★ implementing the appropriate action strategy

★ monitoring the action strategy's implementation

★ establishing feedback and response mechanisms

In the perspective of tourism research, Veal (1997) provided a simpler presentation of the social world within which leisure and tourism exist. It consists of five main elements:
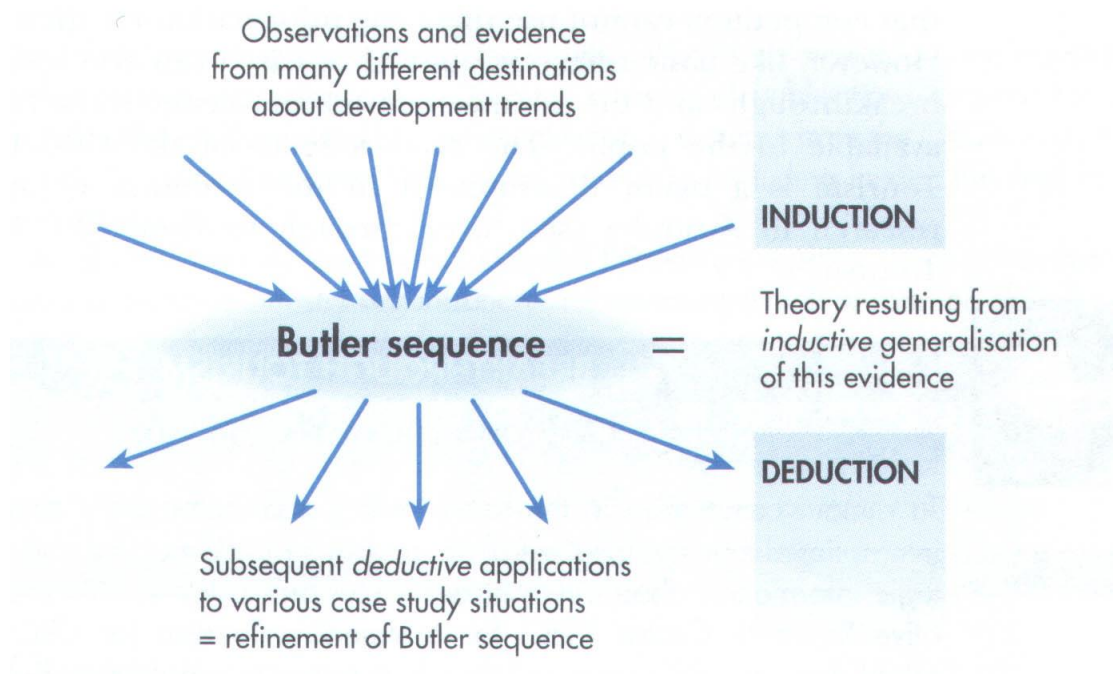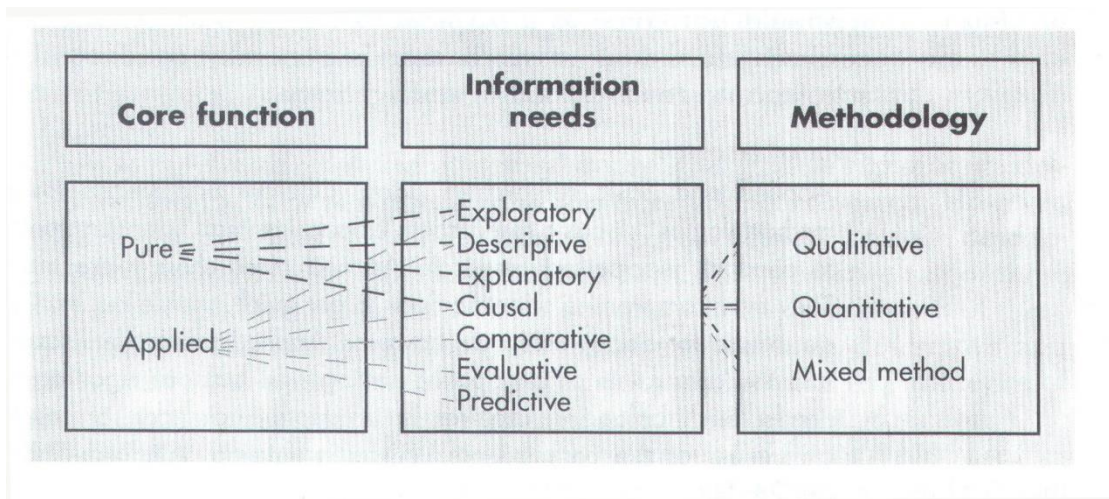
- people

- organizations

- services/facilities/attractions

- the linkages between these three

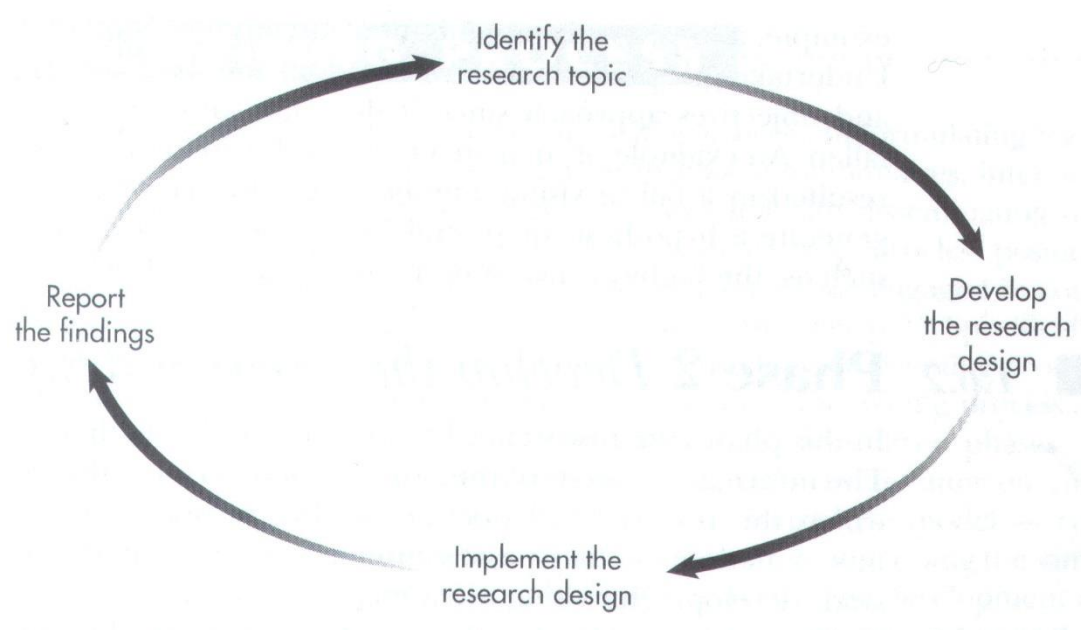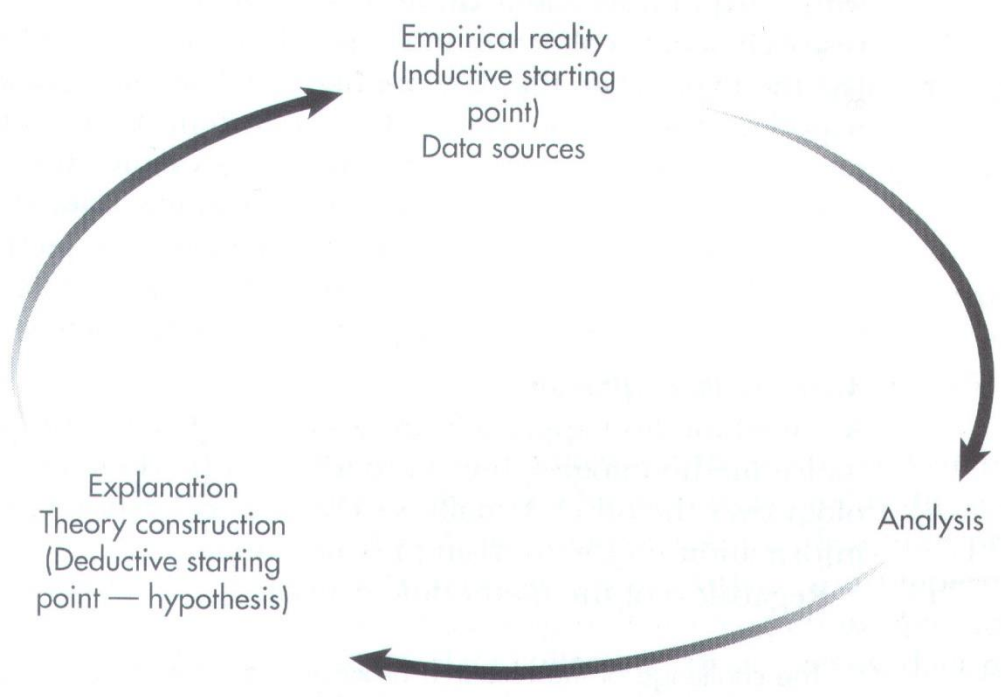- the physical environment within which everything takes place)
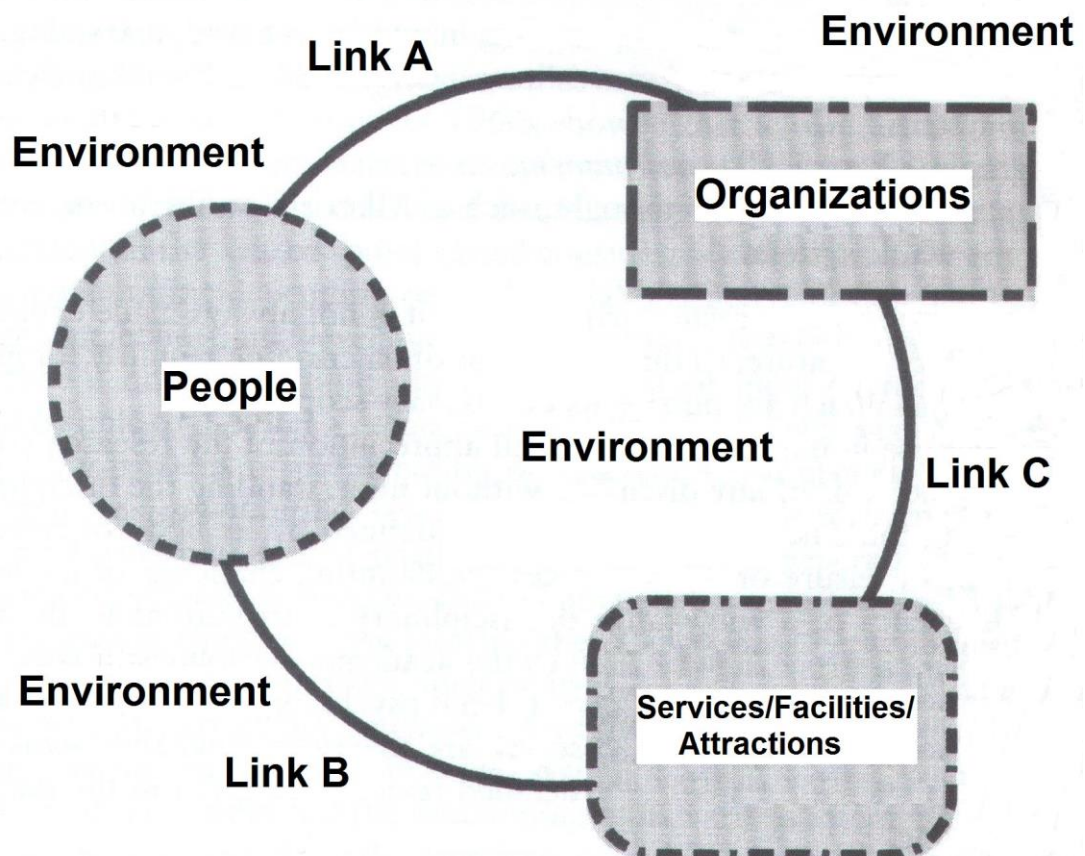
The linkages between people, organizations and services/facilities/attractions consists of the following processes:

- **Link A– market research and political activity**

- **Link B – marketing, buying, selling, employing, visiting or using**

Link C – planning and investment

Core function	Information needs	Methodology
Pure	Exploratory	Qualitative
	Descriptive	
	Explanatory	Quantitative
Applied	Causal	
	Comparative	Mixed method
	Evaluative	
	Predictive	

Observations and evidence
from many different destinations
about development trends

Butler sequence =

INDUCTION

Theory resulting from
inductive generalisation
of this evidence

DEDUCTION

Subsequent *deductive* applications
to various case study situations
= refinement of Butler sequence

Empirical reality
(Inductive starting
point)
Data sources

Analysis

Explanation
Theory construction
(Deductive starting
point — hypothesis)

Identify the
research topic

Report
the findings

Develop
the research
design

Implement the
research design

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                    ┌─────────────────────────┐
                    │     1 Select topic      │
                    └─────────────────────────┘
                          ╱             ╲
┌──────────────────────┐                 ┌────────────────────────────────┐
│ 2 Review literature  │                 │ 3 Devise conceptual framework  │
└──────────────────────┘                 └────────────────────────────────┘
                          ╲             ╱
                    ┌─────────────────────────────┐
                    │ 4 Decide research question(s)│
                    └─────────────────────────────┘
                                  │
                    ┌─────────────────────────────┐
                    │   5 List information needs   │
                    └─────────────────────────────┘
                                  │
                    ┌─────────────────────────────┐
                    │  6 Decide research strategy  │
                    └─────────────────────────────┘
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                    ┌─────────────────────────────┐
                    │      7 Conduct research      │
                    └─────────────────────────────┘
                                  │
                    ┌─────────────────────────────┐
                    │      8 Report findings       │
                    └─────────────────────────────┘
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Identify concepts

Operationalize concepts

Define concepts

Explore relationships between concepts

Service qualities ⟶ Effect 1 ⟶ Effect 2

Services/ Facilities

Good access

Variety

Safe

Physically attractive

Uncrowded

High levels of attendance
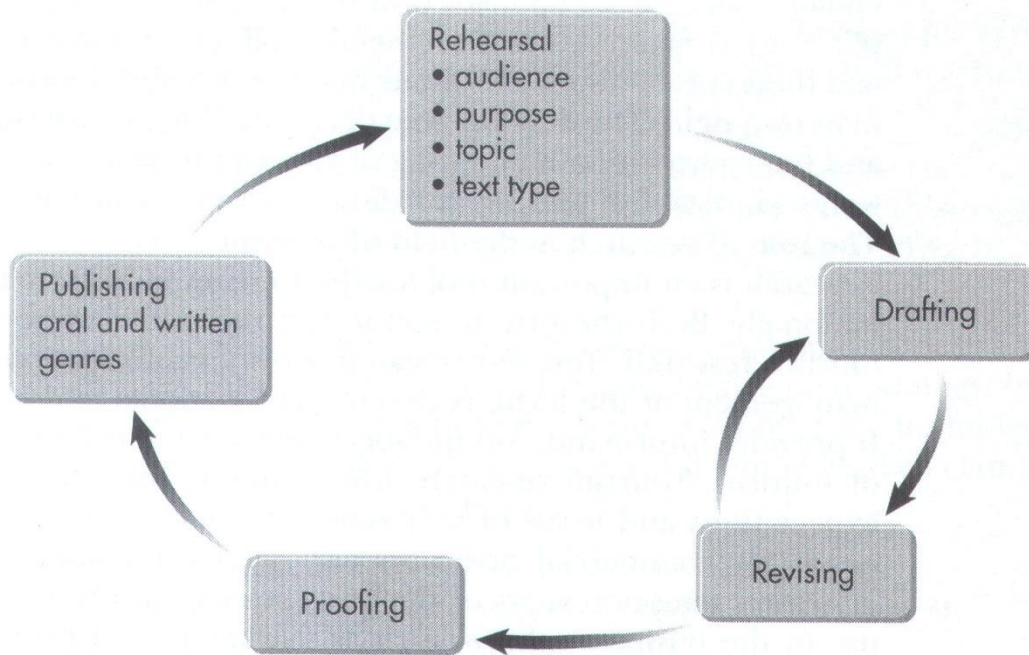
Citizen satisfaction

Economic impact

Crime reduction

Health improvement

The Writing Process

Questions and Discussions

1. Describe the terms: qualitative research; quantitative research; induction; deduction; pure research; applied research

2. Discuss (#1.3 & #1.9 on p. 27)

3. Describe the elements of the research process.

Chapter 2 Theoretical Paradigms

Learning objectives:

● Describing the major theoretical paradigms that inform tourism research

● Discuss the differences between each of the theoretical paradigms

● Explain the consequences of these differences for the conduct of tourism research

Key knowledge: the consequences of these differences for the conduct of tourism research

Difficult knowledge: the major theoretical paradigms that inform tourism research

What is a paradigm?

A paradigm can be defined as the entire constellation of beliefs, assumptions and values that underlie the way in which a society interprets reality at a given point in time. In this sense, a paradigm can also be described as a "world view" or "cosmology". In this textbook, a paradigm is defined as a basic set of beliefs that guides action.

Theoretical Paradigms

Term	Definition
Paradigm	Theoretical Paradigms A set of beliefs
Ontology	The nature of reality

Epistemology	The relationship between the researcher and the subjects/objects
Methodology	The set of guidelines for conducting research
Method	The tools for data collection and analysis

Questions used to organize the description of each paradigm

★ How is the world perceived? (Ontological basis,本体论)

★ What is the relationship between the researcher and the subjects or objects of research? (Epistemological basis, 认识论)

★ How will the researcher gather data/information? (Methodological basis, 方法论)

Positivism embraces a view of the world as being guided by scientific rules that explain the behavior of phenomena through causal relationships.

★ How is the world perceived? (Ontological basis)

The natural world is perceived as being organized by universal laws and truths, the social world is also perceived by universal laws and truths. Human behavior is predictable and can be shaped and controlled.

★ What is the relationship between the researcher and the subjects or objects of research? (Epistemological basis)

Objective and value free（没有个人主观价值的，价值中立的）

Researcher is assumed not to impact on or influence the results or findings

Research follows strict procedures to ensure objective and value-free interpretations

Other researcher should be able to replicate the same piece of research and get the same findings

★ How will the researcher gather data/information? (Methodological basis)

Use the methodology of the physical science.

The research process is objective and value free.

Quantitative method will be primarily used.

Methods of data collection include questionnaires, observation, documentary analysis, experiment and quasi-experiments.

quasi（seemingly, almost, in part, 准、类）

★ Some potential areas of tourism research informed by a positivist paradigm

Consumer behavior studies

Environmental impact studies

Tourism forecasting and modeling

Social impact studies

Economic impact studies

Marketing research studies

Hospitality satisfaction studies Interpretive social science paradigm (解释社会科学)

Also known as constructivist paradigm (建构主义)

Assumes a relativist (相对主义的) ontology (there are multiple realities), a subjectivist (主观主义) epistemology (knower and subject create understanding), and naturalistic (in the natural world) set of methodological procedures.

Differences from positivist paradigm

◆ There are multiple explanations or realities to explain a phenomenon rather than one causal relationship or one "theory"

◆ The research process should be subjective rather than objective

◆ There are multiple explanations or realities to explain a phenomenon rather than one causal relationship or one "theory"

◆ The research process should be subjective rather than objective

◆ The use of a qualitative methodology instead of a quantitative methodology

◆ Data are collected from a insider's perspective rather than from an outsider's perspective

◆ Data are collected in their real world or natural setting as opposed to being collected under "experimental" conditions.

★ How is the world perceived? (Ontological basis)

The world is constituted of multiple realities.

Inductive approach is assumed

Empirical world → theory building

★ What is the relationship between the researcher and the subjects or objects of research? (Epistemological basis)

Researcher is obliged to enter the social setting and become one of the social actors acting in that setting

The relationship between the researcher and subject is subjective rather than objective

★ How will the researcher gather data/information? (Methodological basis)

Use the qualitative methodology

Methods of data collection include participant observation, in-depth interview, case studies, focus group(焦点群体/重点群体) and appreciative inquiry (欣赏式探询，欣赏质询，肯定式探询).

★ Some potential areas of tourism research informed by an interpretive social science paradigm

● the cruise ship experience (a floating resort ,a motable destination,not a means of transportation;not restrict by any government law ,not taxes;high consumution;)

● host-guest interactions

● customer service evaluation

Critical theory paradigm （批判理论）

Based on the work of Karl Marx

To conduct research that will free oppressed groups from oppression and thereby change their social circumstances

See inquiry（对真理的探询）as a means to benefit the world and change conditions

★ How is the world perceived? (Ontological basis)

The world is complex and organized by both overt（显性）and hidden（隐性）power structure.

The world involves oppression, subjugation（征服）and exploitation of minority groups who lack any real power.

The social world perceived as being orchestrated by people and institutions in power positions who try to maintain status quo and subsequently their positions of power.

★ What is the relationship between the researcher and the subjects or objects of research? (Epistemological basis)

Research process involves interaction between the researcher and the minority group being studied.

The researcher's values are important part of the research process.

Subjective relationship

The findings should empower the minority group to effect social change to improve its social circumstances.

★ How will the researcher gather data/information? (Methodological basis)

Get truth below the surface

Qualitative methodology

Participant observation, in-depth interviewing, focus group, Delphic panels(另一个名称是专家决策法), appreciative inquiry, etc.

★ Some potential areas of tourism research informed by a critical theory paradigm

◆ the study of a host community in a developing nation experiencing negative impacts from tourism as a result of several multinational corporations' involvement in tourism enterprises in the host community

  ◆ host-guest interactions

  ◆ the negative social impacts of tourism on the host community

  ◆ the relationship between those in power and those without power

  ◆ indigenous hospitality workers and their working conditions in developing nations

  ◆ the exploitation of children in sex tourism

◆ social pathologies (病态) resulting from tourism developments upon minority groups such as unemployed, women or children

◆ the impacts of vertical integration by overseas companies within host nations and their impacts on indigenous companies

◆ the impacts of mega-events such as the Olympic Games on various sectors within the host community and their living conditions

Feminist perspectives paradigm

（女权主义、女性主义、男女平等主义）

World mediated by gendered constructions; men have power

★ How is the world perceived? (Ontological basis)

There are basically four feminist perspectives:

1. The radical (激进的) feminist perspective

The society is patriarchal (家长的、父权的)

Men occupy the ruling class positions and

women the subject class positions

2. Marxist and social feminist perspective

The subordination of women is a result of historical circumstances that are related to material and economic reasons

3. The liberal（自由主义 ）feminist perspective

Education is very important to achieve equality of the sex

4. Postmodern feminist perspective

To criticize the dominant order and to valorize (maintain, keep) the feminine, women, the other

★ What is the relationship between the researcher and the subjects or objects of research? (Epistemological basis)

The researcher and the women being studied are subjects together, jointly generating knowledge.

Sometimes, they are referred to as co-researchers.

★ How will the researcher gather data/information? (Methodological basis)

Principles of feminist methodology:

1. Acknowledged of the "pervasive influence of gender" by (1) correcting the silencing of women's voices by analysis women's experiences, (2) recognizing the social knowledge has been primarily framed by men about men, and (3) locating the researcher whose gender influences the "researcher act"

2. A focus on consciousness-raising (提高觉悟/意识) of the researcher and the research subjects as well as use of consciousness-raising techniques in the research process

3. A rejection of the subject/object separation in the research act

4. Examination of ethical (伦理) concerns

5. Emphasis on empowerment and transformation

★ Some potential areas of tourism research informed by a feminist perspectives paradigm

◆ barrier to women's participation in the tourism system

◆ women's participation rates in high-level management positions in tourism and hospitality organization

◆ an investigation into women's occupational levels in the tourism and hospitality industries

◆ opportunities for women in developing countries to obtain overseas education scholarships or support for tourism training

◆ policies regarding women and tourism

Postmodernism

Basically, postmodernism is the counterpoint to modernism. Modernism is associated with the advent of industrialization, capitalism, state government, urbanization and knowledge growth. World is complex and constantly changing; infinite interpretations

In regard to knowledge and the Western ontological view of the world, modernism:

◆ asserts truth as immutable (not changeable) facts

◆ valorizes (maintain) progress

◆ expresses humanist tendencies

◆ is based on a strong reliance on science and knowledge

On the other hand, postmodernism:

◆ asserts that there is no one truth that describes social phenomena; all phenomena are different

◆ views the world as chaotic, one without pattern and predictability, without linkages to the past or to the future

★ How is the world perceived? (Ontological basis)

There is no one truth but multiple interpretations of reality.

★ What is the relationship between the researcher and the subjects or objects of research? (Epistemological basis)

The postmodernist perspective is extremely subjective and postmodernists acknowledge their subjectivity in the course of conducting and writing up research output.

The researcher cannot be withdrawn from the research context or site.

★ How will the researcher gather data/information? (Methodological basis)

The researcher gathers information by questioning （怀疑一切） and the researcher questions the methods and tries to design new ways to gain knowledge.

★ Some potential areas of tourism research informed by a postmodern paradigm

◆ the McDonaldization of tourist experiences

McDonaldization: the process by which the principles of the fast food industry are coming to dominate more and more sectors of American society as well as the rest of the world.

◆ the globalization of tourism

◆ virtual tourism（虚拟旅游 ）

◆ the examination and description of authentic travel experiences（谢彦君有一本体验的书记）

Chaos theory paradigm（混沌理论）

The world comprises open, dynamic, ever-changing systems that are non-linear in nature—where small changes can result in large scale outcomes.

★ How is the world perceived? (Ontological basis)

The world is made up of unstable, non-linear dynamic, ever-changing systems rather than stable (static) linear systems.

The world is unpredictable and cannot be ordered; small events can make significant unexpected impacts.

★ What is the relationship between the researcher and the subjects or objects of research? (Epistemological basis)

The relationship between researcher and subjects or objects is almost the same as positivist paradigm.

★ How will the researcher gather data/information? (Methodological basis)

Researcher uses open systems and descriptive algorithms (calculating method) to explain the world.

★ Some potential areas of tourism research informed by the chaos theory paradigm

◆ tourism development and management

◆ to understand the function of tourism system

Virtually, there is no one absolute "right" or "wrong" paradigm in tourism research. Obviously, there are advantages and disadvantages associated with each of the paradigms, but the paradigm adopted should take into account the nature of the tourism system being studied. Alternatively, one topic could be investigated using a variety of paradigms.

Questions and Discussions

1. #2.1 (on p. 58)

In your own words, what is a paradigm and how would you explain the terms ontology, epistemology and methodology?

2. Try to understand Table 2.2 on page 56, and explain the paradigms in simple English or your own words.

Chapter 3 Data sources for tourism research

Objectives :

- Describe the major primary and secondary data source for use in tourism research

- Describe the advantages and disadvantages for primary and secondary data source for use in tourism research

- Basic understanding of content analysis

  Key knowledge:

  Describe the major primary and secondary data source for use in tourism research

  Difficutl knowledge:

  The differences between primary and secondary data

- **Researchers are able to access two types of data sources:**

- **★ Primary data sources(原始资料)**

- **★ Secondary data sources(间接资料、二手资料)**

- **Primary data sources are those collected first-hand by the researcher for use in their research project.**

- **Primary data include:**

- **◆ responses to questionnaires**

- **◆ interview texts**

- ◆ observations

- Within a quantitative methodology, primary data are collected using the methods of scientific experimentation, modeling, mathematical formulae and questionnaires.

- Within a qualitative methodology, primary data are collected using observation, in-depth interviews, focus groups, the Delphi technique and case studies.

- Secondary data sources are those that have been produced by someone else for primary usage and are then used by another researcher not connected with the first project.

- Secondary data include:

- ◆ statistical records

- ◆ government documents

- ◆ diaries and letters

- ◆ research data conducted by other researchers

- Primary data sources

- for tourism research

- Advantages of using primary data sources:

- ◆ relevance （相关性）

- ◆ recency （及时性）

- ◆ appropriate "population" studies

- ◆ lack of other researcher bias

- ◆ lack of inherited methodological errors

- Disadvantages of using primary data sources:

- ◆ reactive nature (subjects know they are being studied, so their behavior might be

changed.)

- ◆ obtrusive nature （打扰、强迫）

- ◆ time-consuming nature

- ◆ resource-expensive nature in regard to personnel, finances, research materials and

  technical equipment and hardware

- Secondary data sources

- for tourism research

- Documents include:

- ◆ Text-based items

- ◆ Audiotape recordings (CDs and other e-media)

- ◆ Videotape recordings (CDs, DVDs and other e-media)

- ◆ Films

- ◆ Artifacts (paintings, posters, etc.)

- Document has five components:

- ★ public documents

- ★ archival documents (public records and historical data)

- ★ personal documents (letters, diaries, e-mails, autobiographies, etc.)

- ★ administrative documents

- ★ formal studies and reports

- Documents can also be classified by temporal nature and original nature.

- ★ Either contemporary（同时性、共时性） or retrospective（*looking back* 回顾性、

  历时性）

- ★ Either primary or secondary

- Temporal nature of documents:

- ★ contemporary documents are produced at or around the same time that the tourism phenomenon being studied occurs

- ★ retrospective (*looking back*) documents are produced after the tourism phenomenon has occurred

- Temporal nature of documents:

- ★ contemporary documents are produced at or around the same time that the tourism phenomenon being studied occurs

- ★ retrospective (*looking back*) documents are produced after the tourism phenomenon has occurred

- Documents can be primary or secondary:

- ★ primary documents are written from first-hand accounts

- ★ secondary documents are written from second-hand accounts

- Advantages of using secondary data sources:

- ◆ retrospectivity

- ◆ quicker and easier to access

- ◆ free or cheaper

- ◆ data collected are spontaneous（自然的、本能的）

- ◆ sometimes it is the only way to access data

- ◆ high standard and quality

- ◆ data can be used for re-testing the credibility of the original research; data can be

used for as comparative data

- ◆ possible to analyze data stored in database for different purposes

- ◆ data are rich because they are produced in the "natural language of the setting"

- ◆ non-reactive

- Disadvantages of using secondary data sources:

- ◆ may not be easy to locate

- ◆ may not be in complete set or may be incomplete

- ◆ may be too fragile to access or have restrictions to use

- ◆ the original researcher may have some methodological problems for the statistical

  data analysis

- ◆ there might be some bias in documentary data

- ◆ may not address the exact "question" or "problem"

- ◆ may have issues associated with validity (accuracy) （效度、正确性）and reliability

  (dependability of measures)（信度、可靠性）

- ◆ might be changed during the process of handing down

- ◆ there is always a question of "reliability" for the secondary data

- ◆ may not be representative of the wider population

- ◆ comparison between documents is not always possible

- Problems with census data

- The data collected span many criteria:

- gender, age, religious affiliation, marital status, nationality, birthplace, current place of

  residence, educational background and qualifications, employment details, dwelling

details, income and vehicle ownership

Disadvantages to using census data

◆ the temporal constraints of census data (snapshot image in time)

◆ the passage of time (collected every five years or ten years)

◆ the scale of measurement (the scale might not be suitable for your research)

◆ the changes in boundaries that can occur

◆ the periodic nature of the data

Key Sources of Secondary Data

★ Tourism organizations and government agencies (see page 73 and Appendix 2 on pp. 425-426)

★ Tourism journals, books, conference proceedings, etc. (see Appendix 3 on page 427)

When looking for secondary data sources, you may find the following checklist useful. Have you:

☞ found the most relevant data to your research?

☞ made sure you understand them fully?

☞ discussed what they show?

☞ used them in a way that adds to your research?

☞ acknowledged their source?

☞ discussed ways in which they might be unreliable?

The process of documentary research

☞ locating pertinent documents or artefacts

☞ organizing and analyzing the documents

☞ **evaluating the information**

☞ **interpreting the data**

Analysis of secondary data:

Quantitative content analysis

☞ **frequency（频次）**

☞ **direction（方向）**

☞ **intensity（强度）**

☞ **space（空间）**

Qualitative content analysis (interpretation)

☞ **creating categories**

☞ **aggregation (*combination*)（整合法）**

☞ **constant comparison（持续比较法）**

☞ **successive approximation（逐步近似法、逐次接近法、渐近法）**

Difference between primary and secondary data sources

The key difference between primary and secondary data sources is associated with the researcher's role in gathering the original data.

The diversity in both primary and secondary data sources

The use of primary or secondary data depends on the research project, the overlying paradigm and external factors such as time and monetary constraints.

Questions and Discussions

1. # 3.1 (on p. 85)

2. # 3.2 (on p. 85)

3. Exercise 3.1 (on pp. 85-87) (Written assignment One: typewritten, double spaced, A4 paper,

Times New Roman font <小四, #12>, 100 words or more; due on April 12, Monday)

Chapter 4 The ethics of tourism research

Objectives:

- understand the need for ethics in tourism research

- tourism researcher's responsibilities to society , to the scientific
  community, to research participants, to sponsors

- explain the need to be ethical

- understand the concepts of reciprocity and reflexity

key knowledge:

tourism researcher's ethical responsibilities to society , to the

scientific community, to research participants, to sponsors

Difficult knowledge:

the need for ethics in tourism research

Ethical consideration in tourism research

★ **Research project design**

★ **Client(为谁做)10/12/2016**

★ **Accessibility（谁能看）**

★ **Intellectual freedom（学术自由）**

★ **Data collection**

★ **Data analysis**

★ **Reporting the findings**

(see pp. 96-97)

Codes of ethics usually entail the following key items:

◆ **voluntary participation by the individual**

◆ **informed consent (知情同意) given by the participant after being provided with either oral or written information about the research**

◆ **the right of the individual to refuse to answer any questions or perform any action**
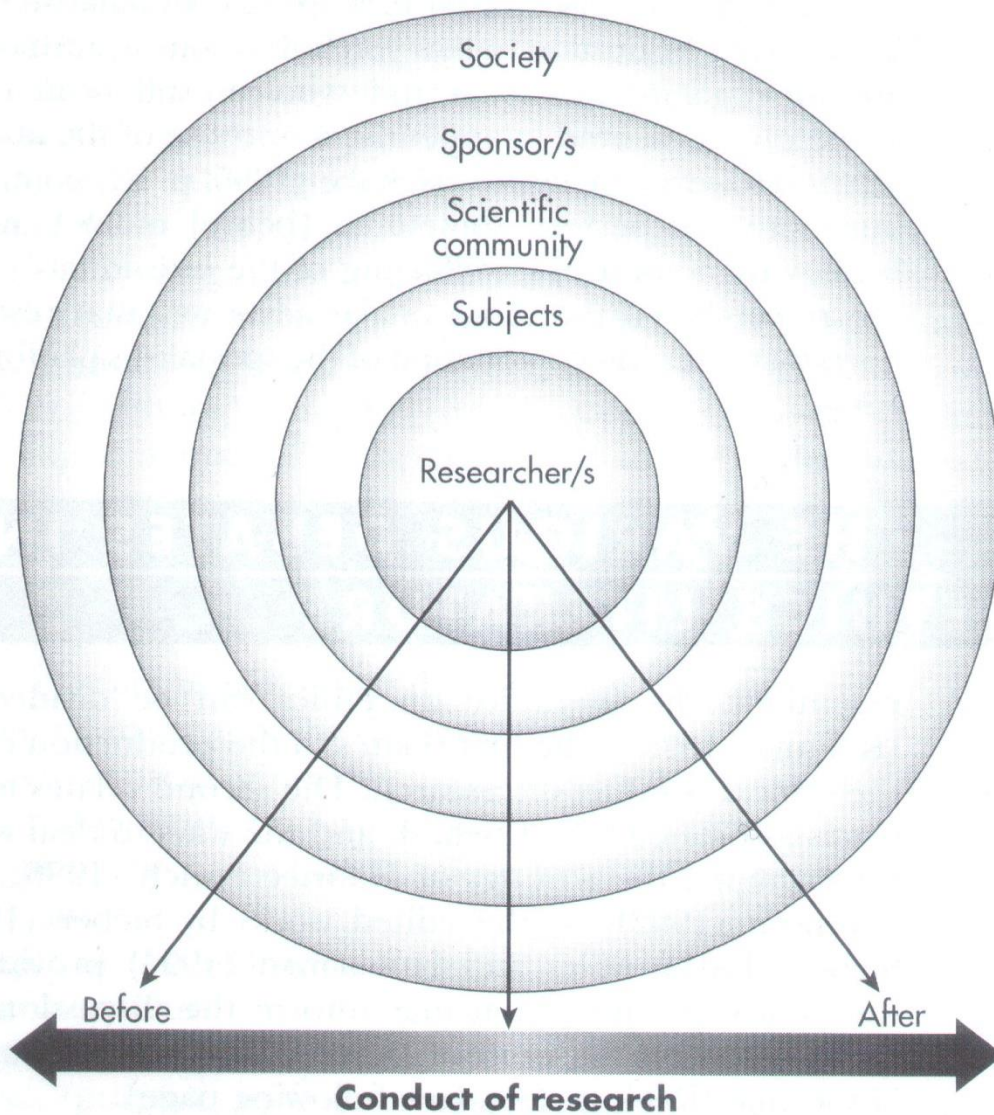
◆ **the right of the individual to withdraw from the research at any time during its conduct**

◆ **the right of the participant not to be deceived regarding any aspect of research (purpose, sponsor or usage of the findings)**

◆ **the right of the participant not to be harmed during any stage of the research, as well as after the research has concluded**

◆ **the right of the individual to have any personal information or data treated as either confidential or anonymous as befits the circumstances of the research**

◆ **the right of research participant to access the research findings**

Society

Sponsor/s

Scientific community

Subjects

Researcher/s

Before

After

Conduct of research

Ethics, stakeholders and the research process

Note that ethical responsibilities exist prior, during and after the research process has been completed.

The tourism researcher's ethical responsibilities to society

(see Table 4.2 on p. 103)

The tourism researcher's ethical responsibilities to scientific community

The tourism researcher's ethical responsibilities to research participants

Four ways to harm participants

★ **Physical harm**

★ **Psychological harm**

★ **Legal harm**

★ **Other harm**

Informed consent (知情同意)

Informed consent needs to provide the following information:

★ **the research purpose and processes**

★ **any potential risks or harm**

★ **the benefits of the research**

★ **how the participants were chosen**

★ **the ability to ask questions concerning the research**

★ **the voluntary nature of their participation**

★ **the identity of the researcher and sponsor**

★ **how the findings will be used**

The importance of anonymity and confidentiality:

★ **enhance the nature and veracity (truth) of responses**

★ **encourage involvement**

★ enhance the sample size and its representation of the overall study population

★ ensure the participants' privacy is not compromised

The tourism researcher's ethical responsibilities to sponsors

★ Deception

Once the research is completed for a sponsor, it may be used for other analytical purposes which the researcher is not known and the researcher cannot inform the participants, so in regard to research purpose, the following points should be addressed:

1. ensure the purpose is stated in a form that will not affect the reliability of the results

2. ensure you tell the participants all you can about the purposes when such information will not influence participants' responses

3. present the purposes in general rather than specific formats

4. untrue purposes should never be constructed

★ Incentives

Distinguish the difference between incentives and bribes.

The tourism researcher's ethical responsibilities to the self

Questions to determine the individual political bias of the researcher:

1. What were the researcher's reasons for conducting the research?

2. Does the wording of the research questions contain any bias?

3. Does the research design exhibit any flaws or methodological problems?

4. Were the data interpreted without any evident bias?

5. Are there any other possible explanations for the findings provided?

	UTILITARIAN APPROACH	DEONTOLOGICAL APPROACH	RELATIONAL APPROACH	ECOLOGICAL APPROACH
Accessing participants	Informed consent	Reciprocity	Collaboration	Cultural sensitivity
Collecting the data	Avoidance of harm	Avoidance of wrong	Avoidance of imposition	Avoidance of detachment
Reporting the findings	Confidentiality	Fairness	Confirmation	Responsive communication

Effects of ethical approaches on the research process

Utilitarian approach 功利

Deontological approach 道义

Relational approach 关系

Ecological approach 生态

Questions and Discussions

1. What key items are included in the Codes of ethics?

2. What information does the Informed consent need to provide?

3. Written assignment Two:

Suppose you are doing a research on the application of a new service method in an amusement park, you will need to know the perspectives from both the customers and staff. Please compose an informed consent. Be sure that all the necessary information required in the consent should be included in your consent form. Take Figure 4.2 as an example, if needed.

Chapter 5 Methodological considerations for tourism research

（旅游研究中的研究方法）

Objectives:

- describe the difference between emic and etic approach to data collection

- explain the difference between qualitative and quantitative methodologies

- explain the use of mixed method approach

- distinguish between various types of sampling

- outline the need for reliability and validity in research

- understand the various types of triangulation and their purpose in tourism research

- discuss the role of pilot studies in the process of conducting tourism research

key knowledge:

the difference between qualitative and quantitative methodologies; the use of mixed method approach; distinguish between various types of sampling; outline the need for reliability and validity in research; understand the various types of triangulation and their purpose in

tourism research; the role of pilot studies in the process of

conducting tourism research

difficult knowledge:

distinguish between various types of sampling

Selecting the "right" methodology

（选择"正确"的研究方法）

The researcher has three options when considering the approach that may

be used in a research project（考虑研究方法时，研究者有三个选择）：

★ a quantitative methodology（定量方法）

★ a qualitative methodology（定性方法）

★ a mixed method approach（混合方法）

Emic and Etic perspectives

（主位与客位视角）

Emic（主位、圈内人、演员视角）：An emic perspective grounds the study

in the setting being studied. It is sometimes referred to as "insider"

research as the researcher becomes as one with the research setting/group

and uses the knowledge bases of the setting, the people and the latter's

explanations and language to describe the phenomenon being studied. This

represents a "subjective" epistemology and is associated with the

holistic-inductive paradigm.（主位视角以研究环境为基础。有时被认为是

局内人的研究，因为研究者成为研究环境中的一员，并运用研究环境、人和人的解释和语言作为知识基础，来描述研究的现象。它代表了一种主观主义的认识论，并于"整体－归纳"的范式相关联。）

Etic（客位、圈外人、观众视角）：An etic perspective utilizes an "outsider" perspective and is akin to the use of an "objective" epistemology. Consequently, it is associated with a quantitative methodology.（客位视角利用局外人的视角，与采用客观的认识论相似。因此，与定量方法相关联）

As is the case with qualitative and quantitative methodologies, a mixed method approach may be used regarding emic and etic perspectives.（就定性和定量方法而言，以主位和客位的视角进行研究时，可能会采用混合方法）

Qualitative versus Quantitative methodologies（定性和定量研究方法）

Research informed by a qualitative methodology will have the following attributes（采用定性方法的研究的特征）：

● an inductive approach that establishes the nature of truth by being grounded in the real world（采用归纳方法，依据真实世界来构建真理的本质）

● an ontological view that sees the world as consisting of multiple realities（采用本体论的视角，认为世界是由多重事实组成的）

● a subjective relationship between the researcher and the participants, that is a subjective epistemology（研究者和研究的参加者之间的关系是主观的，即主观认识论）

● the researcher is essentially viewed as an insider by the study

participants（研究者在实质上被参加者视为局内人）

● the research design is unstructured in order to respond to the field setting and therefore the research design emerges in the course of field work; the research design is also study-specific since it is grounded in the setting being studied（研究设计是非结构化的，这样可以对现场环境的变化做出反应，因此研究设计是在田野工作的过程中产生的；研究设计也是针对具体研究的，因为它是基于研究环境的）

● the research design is unstructured in order to respond to the field setting and therefore the research design emerges in the course of field work; the research design is also study-specific since it is grounded in the setting being studied（研究设计是非结构化的，这样可以对现场环境的变化做出反应，因此研究设计是在田野工作的过程中产生的；研究设计也是针对具体研究的，因为它是基于研究环境的）

● the researcher is interested in emblematic（typical）themes that arise during the course of the study（研究者对在研究过程中出现的典型的主题感兴趣）

● the sampling method is non-random, with every person in the study population not having an equal chance of selection（抽样方法是非随机的，研究总体中的每个人被选择的机会不均等）

● data are represented as textual units rather than numeric representations（数据用文字表述，而不是用数字表达式表述）

● data analysis is focused on eliciting（诱发的）key themes and motifs

associated with the participants being studied（数据分析重视引出与研究对象相关的关键主题）

● representation of the findings is usually in "narrative" form, with the researcher writing in the first person and using an active voice（通常以叙述的方式展示研究发现，研究者以第一人称和主动语态的形式书写研究发现）

● the research report reflects a "slice of life" from the study setting and is specific to that study setting only（研究报告反映了来自研究环境中的"生活片段"，并只针对这个环境）

Research informed by a quantitative methodology will have the following attributes（采用定量方法的研究的特征）：

● a deductive approach that establishes the nature of truth by testing hypotheses（采用演绎方法，通过检验假设的方式来构建真理的本质）

● an ontological view that sees the world as consisting of causal relationships（采用本体论的视角，认为世界是由因果关系组成的）

● an objective relationship between the researcher and the participants, that is an objective epistemology（研究者和研究的参加者之间的关系是客观的，即客观认识论）

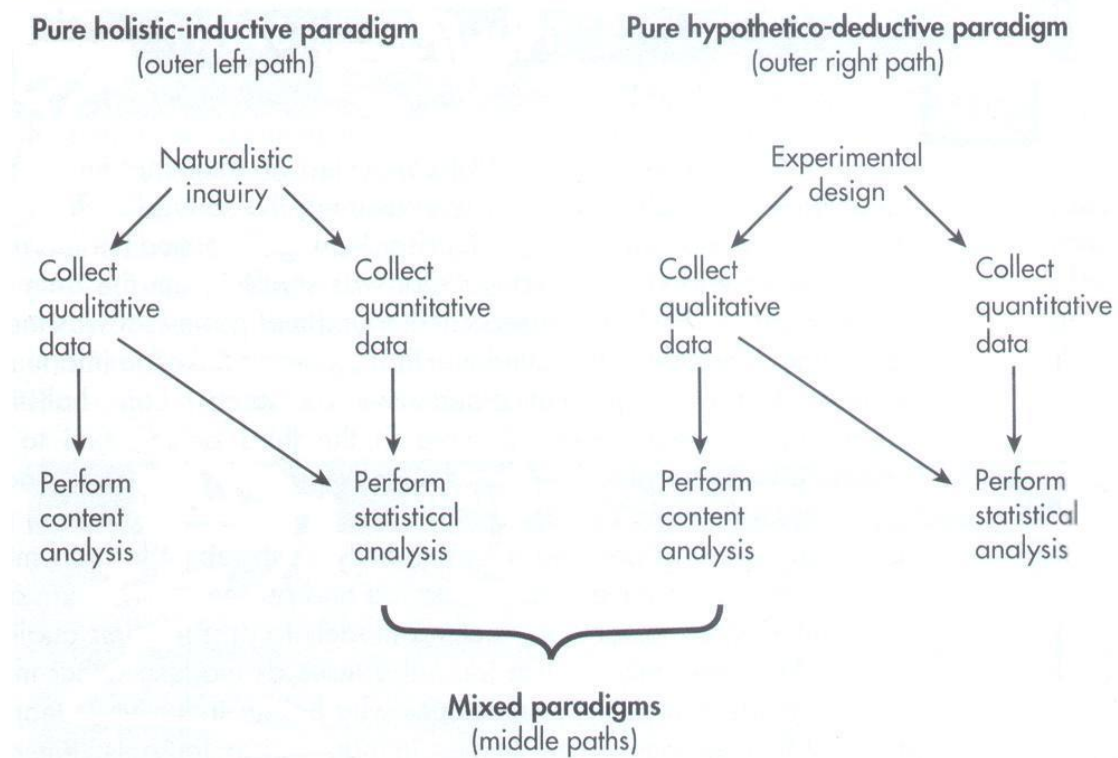● the researcher is essentially viewed as an outsider by study participants（研究者在实质上被参加者视为局外人）

● the research design is structured, systematic and replicable（研究设计是结构化的，系统化的，可以重复的）

● the researcher identifies and tests relationships between variables（研究者识别和检验变量之间的关系）

● the sampling method is random, with every person in the study population having an equal chance of selection（抽样方法是随机的，研究总体中的每个人被选择的机会均等）

● data are represented numerically（数据用数字来表示）

● data analysis is predicted to statistical analysis（采用统计分析的方式进行数据分析）

● representation of the findings is based on statistical tables and graphic representations and the report text is written in the third person, using a passive voice（研究发现基本上用统计图表的方式表示，研究报告以第三人称和被动语态的形式书写）

● the report provides findings from the sample that may be generalized to the wider study population（研究报告提供的研究发现产生于样本，但可以推广到更大的研究总体）

Differences between Qualitative and Quantitative methodologies（定性方法和定量方法的不同）

（参见表 132 页表 5-1）

Pure holistic-inductive paradigm
(outer left path)

Pure hypothetico-deductive paradigm
(outer right path)

Naturalistic inquiry

Experimental design

Collect qualitative data

Collect quantitative data

Collect qualitative data

Collect quantitative data

Perform content analysis

Perform statistical analysis

Perform content analysis

Perform statistical analysis

Mixed paradigms
(middle paths)

There are four possible combinations in using mixed methods（混合方法的四种组合）：

● the simultaneous and integrated collection of qualitative and quantitative data during the field work phase（在田野工作过程中，同时收集定性和定量数据）

● qualitative field work undertaken alongside a multiwave survey, with the first wave survey informing the field worker of focal points for observation—similarly, field work may refine survey focuses in future waves（在多轮调查中采用定性的田野工作，在第一轮调查中告诉田野工作者观察的重点，在以后的调查中，可以进一步改进重点）

(multiweave : Delphic "MULTIROUND") ● **alternation between qualitative exploratory research that informs the construction of a quantitative data collection tool—for example, a questionnaire—followed by further qualitative field work to achieve a deeper understanding of the quantitative findings**（探索性定性研究可以帮助构建收集定量数据的工

具，例如，问卷调查表，然后再进行定性田野工作就能够对定量研究发现进行更深入的理解）

● a quantitative starting point such as a survey used to determine the focal points for a qualitative study, which may be followed up by a quantitative study to clarify conflicting findings（首先进行定量研究，例如调查问卷，可以确定定性研究的重点，然后再进行定量研究，这样就可以澄清具有矛盾性的研究发现）

Sampling（抽样方法）

★ Population（总体）

★ Target population（目标人群）

★ Sample（样本）

★ Sampling（抽样）

★ Sampling ratio（抽样比率）

★ Sample frame（抽样清册、样本架构、抽样框架、抽样框 ）(例：研究一个城市居民的某个问题，居民电话簿就是一个 SAMPLE FRAME)

★ Sample unit（样本单位） **Reasons why researchers may choose to sample population**（研究者为什么要进行抽样）:

● the population may be too large to study in its entirety（研究总体可能太大，不能对其全部进行研究）

● the population may be difficult to access given its geographical distribution（由于地理分布的原因，很难接触到研究总体）

● the human resources available to work on the research project may be

insufficient（没有足够的人力进行项目的研究）

● the funding available for the research project may be limited（由于研究项目的资金有限）

Advantages of sampling a population（抽样方法的优点）：

● the time required for data collection is reduced（减少收集数据的时间）

● the human resources required for data collection and analysis are reduced（减少收集数据和分析数据所需要的人力）

● the costs of the overall research budget are lower as fewer units are studied（因为研究的单位减少，所以可以降低研究项目所需的总成本）

● the costs of expendable items such as material resources, computer banks and questionnaires production are lower（降低消耗项目的成本，例如，物资材料、计算机数据库、问卷调查表）

● other related costs, such as paying experts for their opinions, training researchers and traveling time, are lower（降低其他相关的成本，例如，专家咨询费、培训研究人员的费用、旅行时间）

● the study is completed in a shorter time, so data analysis can occur more quickly and findings become available earlier（研究时间缩短，因此数据分析可以更快地进行，可以更早地获得研究发现）

● systematic sampling enables the findings to be generalized to the entire population（系统抽样方法可以保证研究发现可以推广到整个研究总体中）

SYSTEMATIC 'S ANTONYM IS RANDOM

● the researcher studies fewer members of the population, so more time can be spent with each member to gather more information and to follow up to increase response rates（研究者对较少的总体成员进行研究，因此可以在每个成员身上花更多的时间，获得更多的信息，并可以进行追踪活动，以增加回复率）

● members of the population who are not part of the study are not targeted, so the researcher can concentrate on the target population（研究者可以不针对总体中不被研究的成员，这样就可以集中对目标人群进行研究）

Disadvantages in choosing to sample the population（抽样方法的缺点）：

● difficulties associated with determining the size of the sample（确定样本的大小存在困难）

● knowing whether the targeted study unit has actually participated（不知道目标研究单位实际上是否参加了研究）

● the generation of queries from sample participants（样本产生的一些问题）

● accessibility to and availability and currency of sampling frames（抽样框可接近性、可获得性和流行性问题）

● defining the sampling unit（抽样单位的界定）

● the need for greater organization in regard to administration and planning than non-systematic (non-random) sampling（在管理和计划方面，比非系统，即非随机，抽样方法需要更大的组织）

Some principles the researcher needs to observe when sampling a population. Subjects or study units must（进行抽样时，研究者需要遵守的一些原则）：

● be systematically and objectively selected（系统、客观地进行选择）

● be unambiguously defined（清晰明确地界定）

● be listed only once in the population（在总体中只列入一次）

● not be interchanged（不能交替使用）

● not be discarded（不能丢弃）

● be selected without bias（选择时没有偏见）

● be selected using ethical and scientifically justified process（采用符合伦理和科学的选择过程） **Non-probability Sampling (Non-random)**

（非机率抽样、非随机抽样）

With this kind of sampling, each unit of the population being studied does not have equal chance of being included in the study（采用这种抽样方法，总体中每个单位在研究中被选择的机会不均等）.（与之相对的是随机抽样，机会均等）

Non-probability Sampling (Non-random)

（非机率抽样、非随机抽样）

★ Convenience sampling (accidental /haphazard/chunk and grab sampling 方便、便利抽样)

★ Purposive（立意抽样、目的性抽样）(judgmental sampling, 主观抽样)

★ Snowball sampling（雪球抽样）

★ Expert sampling（专家抽样）

★ Quota sampling（配额抽样）

Probability Sampling（Random）

(机率抽样、随机抽样)

In probability/random sampling, each unit of the population being studied has an equal chance of being included in the sample, that is, the selection of units is determined by chance and each unit is therefore randomly selected（采用随机抽样方法，总体中每个单位被抽取的机会相等，即单位的选择依靠偶然性，每个单位都可以被随机选择）.

Probability Sampling（Random）

(机率抽样、随机抽样)

★ Simple random sampling（简单随机抽样）

★ Systematic sampling（系统抽样）

★ Stratified random sampling（分层随机抽样）

★ Multistage cluster sampling（多级集群抽样、多阶整群抽样）

★ Simple random sampling（单纯、简单随机抽样）

◉ lottery method（抽签方法、抓阄方法）

◉ computer method

◉ name method（名称方法）

◉ Date of birth method

◉ number method

Systematic sampling（系统抽样）

From a list of 1000 cruise ship passengers the researcher wishes to select 500 passengers.

The sample fraction is $k = N/n$

 $k = 1000/500 = 2$

Thus, the sampling fraction is 2—that is, every second name.

There can be problems with this method. For example:

1. Mr Chang; 2. Ms Chang; 3. Mr Vygotsky; 4. Ms Vygotsky;

5. Mr Verdi; 6. Mrs Verdi; 7. Mr Chermside; 8. Mrs Chermside

Steps in stratified random sampling involved（分层随机抽样方法的步骤）：

● dividing the population into a number of strata（把总体分成若干层次）

● developing sampling frames for each strata（确定每个层次的抽样框）

● developing samples from each strata（从每个层次中抽取样本）

● merging the individual samples into on listing（把各个样本合并为一个清单）

Example of stratified random sampling

PREFIXES	EXCHANGE NAME	NUMBER OF TELEPHONES	NUMBER OF RESIDENTIAL NUMBERS	% REPRESENTATION
49390	Localtown	1000	100	3.6
49391	Localtown	1000	200	7.1
49392	Localtown	1000	800	28.6
49393	Localtown	1000	500	17.9
49394	Localtown	1000	200	7.1
49395	Localtown	1000	300	10.7
49399	Localtown	1000	700	25.0
TOTAL		7000	2800	100.0

Multistage cluster sampling

（多级集群抽样）

● This is a probability sampling design that is a stratified sampling of clusters（这是一种随机抽样设计，对集群进行的分层抽样）.

● Stages will involve by using this method（采用这种方法要分步进行）.

● This method is used when researchers want to study clusters in geographical areas（研究者在研究一个地理区域的集群时使用这种方法）.
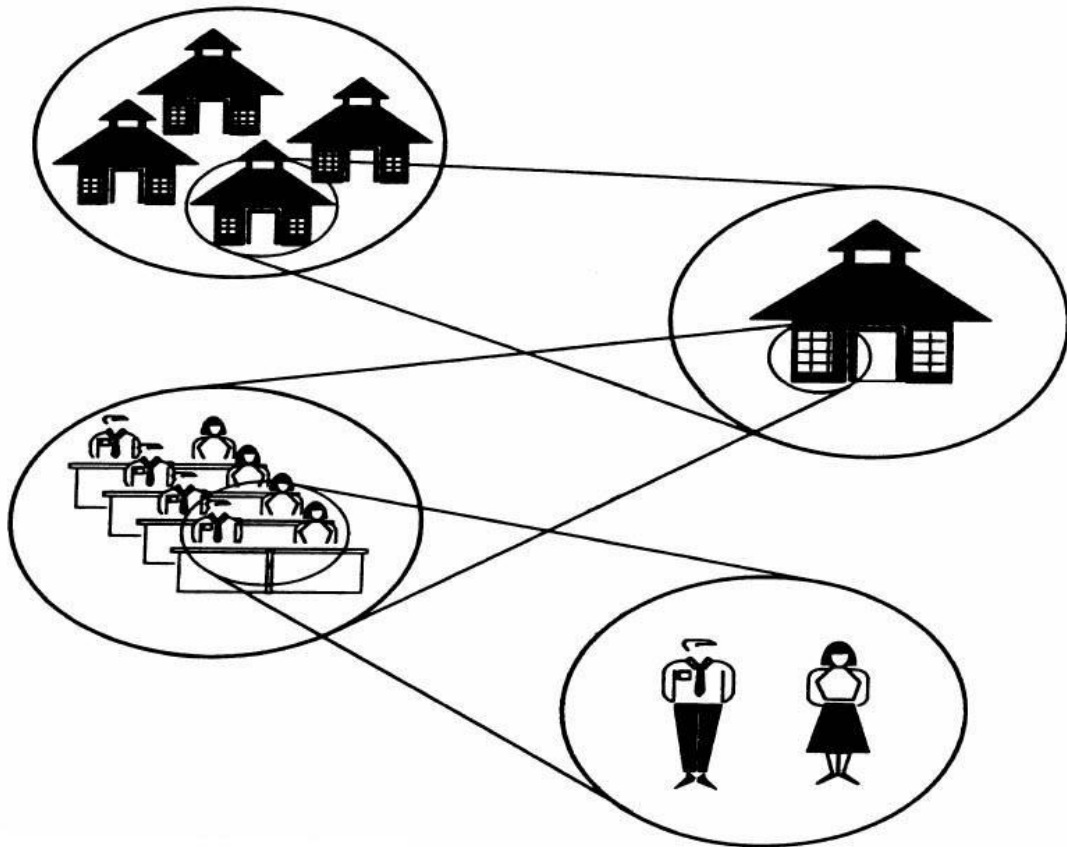
	RANDOM SAMPLING	NON-RANDOM SAMPLING
Selection of participants	Structured and systematic	Non-structured
Opportunity to participate	Equal chance	Unequal chance
Relationship to population	Representative	Non-representative
Applicability of findings	Generalisable	Study-group specific

Differences between random

and non-random sampling

（随机抽样和非随机抽样的区别）

Sample Size（样本数、样本量）

How large should a sample be?（quantitative methodology）

For how long do I collect data from participants?（qualitative methodology）

In responding to these questions, the following need to be considered:

◆ the overall size of the population

◆ the nature of the population（homogeneous or heterogeneous）

◆ the accessibility of the population（easy or difficult to access）

Sample size: quantitative methodology

Neuman（2000）pointed out:

● for population under 1000, researchers should sample 30% of the population

● for population over 10,000, researchers should sample a minimum of 10% of the population

● for population over 100,000, researchers should sample 1% of the population

Sample size: quantitative methodology

Neuman (2000) pointed out:

● for population under 1000, researchers should sample 30% of the population

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● for population over 100,000, researchers should sample 1% of the population

Sample size: qualitative methodology

For how long should the data collection process be over?

When "redundancy with respect to information" occurs, or no new data are found.

Reliability (信度、可靠性) and validity (效度、有效性)

Reliability: attests to the consistency and stability of the measuring instrument (测验的可靠程度，指使用同一测量工具重复测量同一特质时，可获得相同结果的程度)

Validity: evidence that the instrument, technique or process used to measure a concept does indeed measure the intended concept (测验是否测到它所要测的特质和目的，指评估结果的正确性，即测量手段能测量出欲评估特质的程度)

There are several types of validity:

● 表面效度（face validity）：表面上是否像是测所要测的能力？

● 效标（标准）效度（Criterion validity）：测量结果能够代表或者预测效标行为的有效性和准确性的程度

● 内容效度（content validity）：内容上是否可表现出所要测的能力？

● 建构效度（construct validity）：以心理学理论为基础所发展的测验，是否能反映此理论？

Triangulation（三角校正、多角度方法、研究整合）（注：兼听则明）

Four types of triangulation:

● data triangulation

● investigator triangulation

● theory triangulation

● methodological triangulation

Pilot studies（小规模实验性研究、试点性研究、前测研究）

In pilot studies:

● tool or tools for gathering data are developed

● before going to the field to gather data, researcher must check the tools work

● a kind of "dress rehearsal"（上妆彩排，相当接受正式研究）

Questions and Discussions

1. What are the main differences between qualitative and quantitative methodologies?

2. Define non-random and random samplings.

3. What are the major sampling approaches used in these two samplings?

Chapter 6 Qualitative methods and tourism research

（定性研究方法与旅游研究）

Objectives:

Master the criteria that define qualitative research; principle of unstructured /in-depth interviews, advantage and disadvantages of unstructured /in-depth interviews; process of semi-structured interview, focus group, participation observation, Delphi ,longitudinal studies, case studies, action studies, documentary research, non-sexist research advantage and disadvantages of semi-structured interview;

Key knowledge:

principle of unstructured /in-depth interviews, advantage and disadvantages of unstructured /in-depth interviews

Difficult knowledge:

Content analysis

Qualitative Methodology（定性方法）

Symbolic interactionism (符号互动主义、象征互动主义)

Symbolic interaction looks at how humans act in relation to events, objects and others based on a system of meanings associated with each. Such meanings are generated by social interaction, and meanings are modified over time through further social interactions.（符号互动主义关注人们是如何根据一个相互联系的含义系统，采取与事件、物体和其他东西相关的行动的。这些含义产生于社会互动，而随着时间的推移，以及进一步的社会互动，这些含义还会得到修正。）

符号互动主义

这种方法论主要是借助象征符号的互动（symbolic interaction）来促进人与人之间的了解，而非技术性的控制与预测。

人类制造和使用符号，赋予符号以意义，借助符号进行交往，领悟和扮演角色，读懂及预期对方表现并作出合适的反应。心智和自我的产生完全是由于互动的缘故。没有互动，社会意义上的人也就不复存在。因此，"人是生活的创造者"，社会本身是人的互动建构出来的。"社会是一种人类的产品。社会是一种客观的现实。人是一种社会性产品。"

There are a diversity of forms of symbolic interactionism with an equally diverse number of interpretive and qualitative methodological approaches, such as ethnography (民族志学), grounded theory (扎根理论), participant observation, feminist perspectives, interviewing and conversational analysis.（符号互动主义存在多种多样的形式，也有多种多样的解释性和定性的研究方法，例如，民族志学、扎根理论、参

与观察法、女权主义、访谈法和话语分析。)

grounded theory (扎根理论)：透过有系统的收集和分析资料的研究历程之后，从资料所衍生而来的理论。在此一方法中，资料的收集、分析和最终形成的理论，彼此具有密切的关系。

扎根理论通过以下方式发展起来：（1）不带任何假设的进入到研究现场；（2）描述发生了什么；并且（3）基于观察的基础之上，对于事情为什么会发生给出明确的解释。与从概念层面到经验层面相反，扎根理论开始于经验层面（收集数据），中止于概念层面。

Phenomenology (现象学)

By phenomenology it is meant that the study of how people describe things and experience them through their senses. （现象学研究人们如何通过感觉来描述和体验事情。）

Heuristic research (启发式研究)

The process of heuristic research involves six phases （启发式研究的过程包括 6 个阶段）：

◆ **initial engagement**（开始进入）

◆ **immersion**（浸入）

◆ **incubation** （深思熟虑、酝酿）

◆ **illumination** （启发）

◆ **explication (**详细解释、阐明**)**

◆ **creative synthesis**（创造性综合）**Ethnomethodology**

(常人方法学、民俗方法学 **)**

From an ethnomethodological perspective, there is no order to social life, only that ascribed by the social actors.（从常人方法学的角度，社会生活是没有秩序的，有的只是社会行动者们描述的东西。）

常人方法学

"常人方法学"是本世纪 **50** 年代以来美国兴起的一个重要社会学流派,是美国社会学界产生的最有原创性的流派之一。据"常人方法学"的创始人 加芬克尔（**Garfinkel**）回忆，"常人方法学"（**ethnomethodology**）一词是他本人在 **1954** 年发明出来的，借以彰显其研究方法的独特性:"常人方法学"的研究在分析日常生活活动时，将其看作（社会）成员的方法，成员用它们使日常生活看起来是理性的，并出于各种实践目的使行动变得可以讲述（**reportable**），也就是'可以说明'（**accountable**）。"常人方法学"这一名称体现的这个学派的两个主要倾向：**(1)** 社会学应该是对日常生活的研究，既应当关注宏观的社会事件，也应当关注"琐碎"的社会现实；**(2)** 社会学本身也是一种一种日常活动。

Ethnography

(民族志学、群体文化学**)**

Ethnography is the art and science of describing a group or culture. The conduct of ethnography is guided by several principles（民族志学是描述一个群体或者一种文化的艺术和科学。采用这种方法要遵循下述原则）:

● **a focus on understanding and interpretation**（重视理解和阐述）

● **a focus on process or negotiation of meanings**（重视过程或含义的磋商）

● **research undertaken in natural settings**（在自然环境中进行研究）

● **social phenomena studied within the social context in which they occur, in order that a holisitc perspective is gained**（在社会现象发生的社会背景中对社会现象进行研究，以期获得全面的视角）

● **emic and etic perspectives jointly utilized**（同时采用主位和客位的视角）

● **the identification of multiple realities/perspectives**（识别多重事实/视角）

● **the use of multiple methods that include participant observation and interviewing** （采用多种方法，包括参与性观察和访谈方法）

● **non-judgmental positioning**（非判断性定位）

Different methods used to gather data within a qualitative methodological framework（在定性方法的框架内使用的各种收集数据的方法）：

★ **interviews**（访谈法）

★ **participant observation (**参与性观察**)**

★ **focus group (**焦点小组**)**

★ **longitudinal studies (**纵向研究、追踪调查研究，也称为趋势研究**)**

★ **Delphi techniques (**德尔菲法、专家决策法、专家意见法**)**

★ **case studies** （案例研究）

★ **action research (**行动研究**)**

★ **documentary method**（文献方法）

	STRUCTURED INTERVIEWS	SEMI-STRUCTURED INTERVIEWS (FOCUSED INTERVIEWS)	UNSTRUCTURED INTERVIEWS
Ontology	Closed world view — universal truths and reality	Multiple realities	Multiple realities
Epistemology	Objective (subjects and study units)	Subjective (participants and phenomenon)	Subjective (participants and phenomenon)
Methodology	Quantitative	Qualitative	Qualitative
Examples	Standardised interviews; surveys; opinion polls; interviewer-completed questionnaires	In-depth interviews; surveys; group interviews (focus groups)	In-depth interviews; group interviews (focus groups)
Format	Fixed schedule; short responses	Topic/theme lists generally open-ended questions	Oral/life histories; conversational
Duration	Short — 10 to 30 minutes	Medium to long — 1 hour or more	Medium to long — 2 hours or more; several sessions

Unstructured interviews（非结构式访谈）

(in-depth interviews)（深度访谈）

Interviews conducted with the primary purpose of identifying some important issues relevant to the problem situation, without prior preparation of a planned or predetermined sequence of questions.（访谈的主要目的是识别与问题情境相关的一些重要的问题，事先不准备访谈计划，也不预先设定访谈问题。）

Advantages of unstructured interviews（非结构式访谈的优点）

◆ **Enable the interviewer to gather "rich" data and "thick"**

descriptions（使访谈者能够收集到"丰富"的数据和"详尽"的描述）

◆ Rapport (friendly relationship) and trust are able to established and this facilitate the interaction and the depth of discussion on the research topic（可以建立起和谐默契的关系和信任，这样就有利于双方互动和对研究问题进行深入的讨论。）

Disadvantages of unstructured interviews（非结构式访谈的缺点）

◆ the data cannot be extrapolated to the wider population（数据不能被外推到更广大的总体中去）

◆ the subjective nature of the interaction raises queries over reliability and validity for some positivist critics（互动的主观性能够产生一些信度和效度的问题，使实证主义者提出质疑）

◆ there is a large investment in time and personnel gathering data（收集数据时需要投入大量的时间和人力资源）

Semi-structured interviews

（半结构式访谈）

Semi-structured Interviews can be used by both qualitative and quantitative methodologies. The focus of this chapter is on qualitative methods.（定性方法和定量方法都可以使用半结构式访谈。本章重点讨论定性方法中的半结构式访谈。）

Semi-structured interview prompt list

（半结构式访谈提纲实例）

TRAVEL EXPERIENCES WITHIN AUSTRALIA

- Background travel experiences (grand tour type of question)
- Present travel experience
  — who with?
  — how able to travel now?
  — duration of travel
  — why Australia?
  — what activities?
  — satisfaction
    • destinations
    • activities
    • people (hosts)
- Future plans
- Other comments

Advantages of semi-structured interviews

（半结构式访谈的优点）

◆ multiple realities can be determined（可以确定多重事实）

◆ useful in gathering data on complex issues and sensitive issues（有利于收集复杂问题和敏感问题的数据）

◆ detailed information regarding attitudes, opinions and values can be gathered（能够收集到关于态度、观点和价值观方面的详细信息）

◆ **the interviewer is able to ask for further clarification and details**（采访者可以要求受访者进一步澄清和解释）

◆ **interview probes can be altered to follow the path the interviewee is focused on**（访谈的探寻点可以随着受访者所关注的问题而改变）

◆ **queries can be clarified**（疑问可以得到澄清）◆ **verbal and non-verbal cues can be recorded and included in the analysis**（语言和非语言的暗示都可以记录下来，并在分析数据时加以考虑）

◆ **follow-up questions can be framed to further extend responses**（可以提出一些补充跟踪性问题，以获得更深入的回答）

◆ **provide a more relaxed interview setting**（可以营造一个更宽松的访谈环境）

Disadvantages of semi-structured interviews（半结构式访谈的缺点）

◆ **different interviewers will result in differences in researcher-interviewee interaction,** （不同的访谈者在研究者/受访者之间的互动方面会产生不同的结果）

◆ **the interviewee leads the interaction and the interviewer follows**（受访者可能会主导互动，访谈者可能会处于被动地位）

◆ **the style of interviewing is closer to unstructured interviewing**（半结构式访谈的风格与非结构式访谈相似）

◆ **replication is impossible**（无法进行重复）

◆ **the interview takes much longer time than structured interviews**（访谈所需的时间比结构式访谈长）

◆ **if the interviewer is not skillful the data gathered may be useless**（如果访谈者缺乏访谈技巧，搜集到的数据可能对研究没有用处）

◆ **rapport is necessary**（如果希望收集到复杂和敏感的信息，就一定要与受访者建立融洽的关系）

◆ **the researcher may manipulate the data and bias the data**（研究者可能会操纵利用访谈数据，并偏见性理解访谈数据）

Some hints for interview etiquette

（访谈的一些礼节）

◆ **always arrange the appointment to suit the interviewee**（一定要按照受访者的要求安排访谈）

◆ **be sure all interviewing materials working and organized before hand**（在采访之前，要确保所有的访谈材料都行之有效，完整）

◆ **always arrive on time**（一定要准时到达）

◆ **be flexible**（要有灵活性）

◆ **consider your overall appearance**（要注意自己的衣着打扮）

◆ **be aware of cultural protocols or codes of conduct**（要注意不同文化的不同礼仪和不同的行为准则）

◆ **be conscious of social justice principles**（要注意社会公正的原则）

◆ **remember the ethical rights of the interviewee**（切记要尊重受访者的伦理权利）

◆ **pay attention to the interviewee throughout the interview**（在整个采访过程中要关注受访者）

◆ **ask permission to take notes or to audiotape or videotape the interview**（如果要记录或录音、录像，一定要得到受访者允许）

◆ **arrange time to have interviewee check or comment on the transcript**（要安排时间让受访者核对采访记录或者对采访记录提出意见）

◆ **use probes or prompts to elicit further information**（采用探寻点或提示的方式诱发进一步的信息）

◆ **do not manipulate the interviewee to present information in one light only (this biases the data)**（不要操纵受访者只从一个角度提供信息，用这种方式得到的信息会带有偏见）

◆ **check the comfort level of the interviewee**（要检查受访者的舒适程度）

◆ **be prepared to break off the interview if necessary**（如果需要，随时准备中断采访）

◆ **advise the interviewee upon the midpoint and end**（在采访进行到中间和结束时，要提示受访者）

◆ **ensure you formally close the interview**（一定要正式结束采访）

Participant-observer (参与性观察者)

A researcher who collects observational data by becoming a member of the system from which data are collected.（研究者首先成数据来源系统中的一个成员，然后再收集观察数据）

Four steps of participating

（参与观察的 **4** 个主要阶段）

★ **the researcher may be treated suspiciously**（研究者不被信任）

★ **establishing the observer-observed relationship**（建立观察者/被观察者之间的融洽关系）

★ **the researcher is granted "categorical" membership of the group**（研究者被赋予了"明确的、无条件的"群体成员身份）

★ **departure stage**（离开阶段）

Advantages of participant observation（参与性观察的优点）

★ **examines interactions and behaviors in real-world settings**（在真实的环境中研究人们的互动和行为）

★ **enables researcher to know how participants construct and describe their world**（使研究者能够了解研究对象是如何构建和解释其世界的）

★ **provides first-hand information**（可以提供第一手资料）

★ **provides information when other data collection methods are less effective**（如果采用其他数据收集方法不能奏效时，采用这种方法可以获得信息）

★ **may highlight behaviors/events that the observed may not wish to discuss**（可以强调被观察者不原意讨论的行为/事件）

★ **is time efficient**（节省时间）

★ **is not associated with complicated data collection methods**（不涉及复杂的数据收集方法）

★ **is cost-effective**（节省成本，既观察，也采访）

★ **enables a wide range of data to be collected**（能够收集到更广泛的数据）

Disadvantages of participant observation（参与性观察的缺点）

★ **does not work with large groups**（对大型群体使用这种方法的效果不好）

★ **does not have a temporal comparability**（不能在时间上进行比较，观察的只是现在）

★ **is not appropriate for opinions and attitudes unless coupled with interviewing**（除非与访谈同时使用，否则不适合于研究人们的观点和态度）

★ **may not gather complete information sets, as some events may be taboo for observation**（由于一些事件可能禁止外人观察，所有可能无法收集到完整全面的信息）

★ **may be associated with observer bias, selective observations and interpretations**（观察者可能会带有偏见、进行选择性观察和解释）

★ **has no control for researcher bias**（无法控制研究者的偏见）

★ **does not provide quantifiable generalizations on results**（不能对研究结果进行量化推广和概括）

★ **may result in misinterpretation of interactions or phenomena**（可能导致对互动或现象的曲解）

★ **may cause changes in behavior due to the participant observer's**

presence（可能由于参与性观察者的存在，而导致被观察者的行为发生变化）

★ **may result in difficulty in comparability if several observers are in the "field"**（如果多个观察者同时在现场进行观察，不同观察者之间很难进行比较）

★ **replication is impossible**（无法进行重复研究）

★ **is associated with subjective interpretations**

Focus group(焦点群体、焦点小组)

A group consisting of 8 to 12 randomly chosen members who discuss a product or any given topic for about two hours with a moderator (facilitator) present, so that their opinions can serve as the basis for further research.（随机选择 **8-12** 个人组成焦点小组，对一种产品或某个话题进行大约 **2** 个小时的讨论，由一个主持人主持这场讨论，他们提出的观点可以作为进一步研究的基础）

The moderator (facilitator) need to ensure（主持人要保证做到）：

★ **all people's views are respected**（要尊重所有人的观点）一虎一席谈

★ **all people have equal time to contribute**（所有人都要有均等的发言时间）

★ **no one dominates the session**（不要让某个人控制或主导整个讨论）

★ **emotions do not get out of hand**（不要情绪失控）

Advantages of focus group

（焦点群体的优点）

★ **participants to interact with others in order to clarify individual opinions**（参加者能够与其他人进行互动，以澄清和阐述个人的观点）

★ **some degree of flexibility to follow unexpected trends or issues**（在应对一些意外趋势或问题上，具有一定的灵活性）

★ **the generation of multiple realities by participants**（参加者能够产生出多重事实）

★ **development of "rich" data**（能够获得"丰富"的数据）

Disadvantages of focus group

（焦点群体的缺点）

★ **be dominated by strong personalities**（讨论可能会被有强烈个性的人所左右）
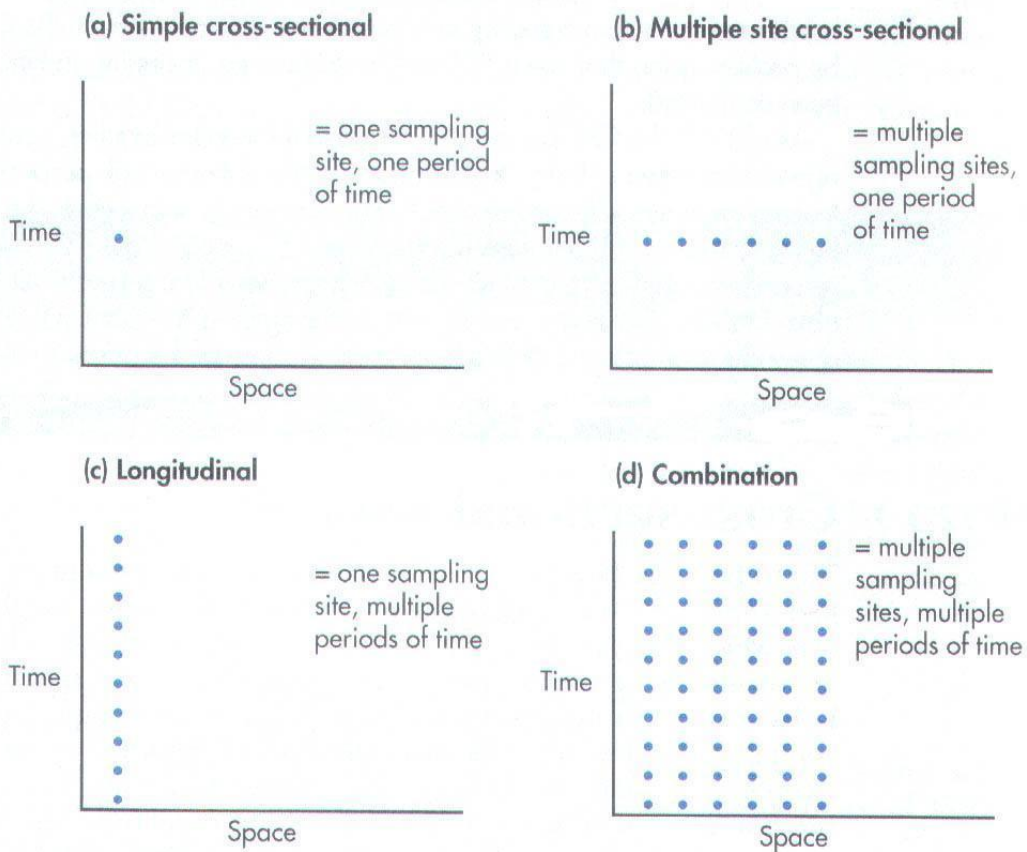
★ **diverge from the focus of attention**（讨论可能会偏离所关注的焦点）

★ **present a biased perspective**（可能会展示出带有偏见的观点）

★ **be constituted of participants who do not reflect the variety of views of the study population**（焦点群体的成员的观点可能不能代表研究总体的多样性观点）

Longitudinal studies

(历时研究、纵向研究、追踪调查研究)

A research study for which data are gathered at several points in time to answer a research question.（采用这种方法在多个时间点上收集数据，以期回答一个研究问题）

(a) Simple cross-sectional

Time — Space

= one sampling site, one period of time

(b) Multiple site cross-sectional

Time — Space

= multiple sampling sites, one period of time

(c) Longitudinal

Time — Space

= one sampling site, multiple periods of time

(d) Combination

Time — Space

= multiple sampling sites, multiple periods of time

Types of longitudinal studies

（历时研究的类型）

★ **panel study(小样本连续研究、小样本追踪研究)**

★ **time series(时间序列研究)**

★ **trend studies(趋势研究)**

★ **cohort analysis(同批人分析、同期群分析、断代分析、世代分析)**

★ **case study(案例研究)**

TYPE OF STUDY	CHARACTERISTICS	TOURISM EXAMPLE
Panel study	Same group of people over time	Identifying a group of people who represent a specific sociodemographic market segment and studying their holiday patterns over an extended period of time.
Time series	Different individuals over time, although one of the criteria remains constant, such as the study setting	An integrated resort determining the changing market segments that use the resort.
Trend studies	Research over time with different subjects	Studying residents to determine their domestic and international travel patterns.
Cohort analysis	Participants have an experience that is similar within a set time period	Identifying flight crew intakes trained during a specific year and then studying them throughout their employment to discuss working conditions.
Case study	Intense observation or data collection over the short or long term	Studying a small seaside community located close to a major tourism precinct over a 20-year period using a variety of qualitative research methods such as focus groups, participant observation, interviews and the documentary method.

Longitudinal studies seek to ascertain a long-term understanding of（历时研究寻求对下列问题的长期发展趋势的理解）：

★ **social impacts of tourism development associated with host communities and tourists**（旅游发展对接待地和旅游者的社会影响）

★ **environmental impacts by gathering data from people with relevant knowledge or experiences**（通过从具有相关知识或经验的人们那里收集到的数据，对环境影响进行研究）

★ **effects of social and economic changes on travel behavior**（社会和经济变化对旅行行为的影响）

★ **changes in travel experience behavior**（旅行体验行为的变化）

★ **trends or patterns in on-site activities of various market segments**（各种不同的市场细分在目的地的活动的趋势和模式）

★ **changes or trends in regard to tourism destinations**（旅游目的地的发展趋势）

★ **forecasting future events**（对未来事件的预测）

Advantage of longitudinal studies

（历时研究的优点）

★ **gathering over time of extensive data that is rich in nature and allows a fuller picture to be achieved**（在很长的时间跨度收集广泛的数据，这些数据的内容很丰富，能够展示出比较完整的画面）

Disadvantages of longitudinal studies（历时研究的缺点）

★ **persuading potential participants of the importance of the study and their participation**（要不断地说服潜在的参加者，要告诉他们这个研究的重要性和他们的参与的重要性）

★ **learning how to deal with "drop-outs" in studies within a constant sample of participants over time**（要学会如何处理在恒定的参加者者样本中不断出现中途退出者的问题）

★ **researcher bias in participant selection**（研究者在选择参加者时会带有偏见）

Delphi technique

(德尔菲法、专家决策法、专家意见法)

采用函询或现场深度访问的方式，反复征求专家意见，经过客观分析和多次征询，逐步使各种不同意见趋于一致。**(1)**首先邀请在业内不同专业结构的专家各自发表自己的意见;**(2)**然后由研究者收回，将所有专家的意见反馈给各个专家，再请他们进行评估或修正;**(3)**然后再由研究者收回，进行相关的统计工作，并把结果再反馈给专家，专家再次进行修正，评估，然后将专家的意见进行处理，得出建设性的意见。根据不同课题需求，通常进行 **3-4** 轮。

Advantages（优点）

★ **enable geographically dispersed experts to participate in the study**（可以让分布在各地的专家共同参与研究）

★ **participants can put forward their points of view without being influenced by the face-to-face interaction that occurs in a focus group**（参加者可以提出其自己的观点，不会受到发生在焦点群体中的那种面对面互动的影响）

★ **no travel expenses are incurred**（不会发生旅行费用）

★ **information may be added throughout the process**（在这个过程中可以不断地补充新的信息）

★ **since data are gathered in a sequential manner, the Delphic method is appropriate for phased planning exercises**（由于以连续的方式收集数据，因此德尔菲法适合于分阶段进行的研究计划）

Disadvantages（缺点）

★ **there is a problem of maintaining panel participation for the**

duration of the iterations (repetitions)（在持续重复的过程中，很难保持所有专家都全程参与）

★ it is a time-consuming method（这种方法很耗费时间）

★ the panel size may prove to be too hard to control（专家组人数的多少难以控制）

★ the panel composition may exhibit researcher bias（专家的构成成分可能会显示出研究者的偏见）

Case study（案例研究）

The documented history of noteworthy events that have taken place in a given institution, setting, community or environment.（在一个特定的机构、情境、社区或环境中对发生的重要事件所进行的记录性研究）

TYPE OF CASE STUDY	DESCRIPTION
Exploratory (Yin 1994)	The study 'explores' single or multiple cases of the tourism phenomenon to discover uniqueness or characteristics, since no pre-existing data exist in the public arena. The 'what' is determined.
Descriptive (Yin 1994)	The study collects evidence to enable the researcher to describe either a single case or multiple cases. The 'who', 'what' and 'where' are determined.
Explanatory (Yin 1994)	The study seeks to determine 'how and why' the single case or multiple cases operate as they do.
Single (Yin 1994)	Only one case is studied holistically, such as one tourism organisation, one tour operation, one transportation company or one tourism event. The case selected may be critical, unique, extreme or revelatory.
Multiple (Yin 1994)	Several cases are studied holistically. The cases studied may be similar in nature or different in nature.
Intrinsic (Stake 1995)	Cases are studied that hold particular interest for the researcher.
Instrumental (Stake 1995)	Cases are studied in order to achieve secondary ends, e.g. studying an organisation such as a hotel to determine the impact of a change in pricing rates.
Collective (Stake 1995)	A number of cases are studied during the course of the one project — similar to Yin's (1994) multiple case study.

Steps in case study design

and data collection

（案例研究的设计和数据收集步骤）

★ **identify the issues or research themes**（确认问题或研究主题）

★ **determine the type of case to be used**（确定所采用的案例类型）

★ **select the case or cases**（选择一个或多个案例）

★ **negotiate access to the case setting**（协商进入案例环境）

★ **enter the setting or commence data collection**（进入案例环境或开始数据收集）

★ **gather the data**（收集数据）

★ **analyze the data**（分析数据）

★ **check the findings with case study members**（与案例研究成员核对研究发现）

★ **leave the case setting**（离开案例环境）

★ **report the data**（撰写数据分析报告）

Advantages（优点）

★ **in-depth data is collected on a single case or multiple cases**（在一个案例或多个案例中可以收集到深层的数据）

★ **evidence is grounded in the social setting being studied**（收集到的数据是基于被研究的社会环境的）

★ **study members can check the data for accuracy**（研究成员可以核对数据的准确性）

★ **member checking may remove researcher bias**（研究成员间进行的核对工作可以消除研究者的偏见）

★ **methodological triangulation is used**（在研究方法方面可以采用三角校对法）

Disadvantages（缺点）

★ **the case study focus is emergent**（案例研究的焦点是逐步浮现出来的，因此会增加研究资源）

★ **the research process is subjective**（研究过程具有主观性）

★ **evidence may be denied for reproduction based on the use of**

member checking（根据成员之间进行的核对工作，证据可能会被否定）

★ the researcher may not act ethically and consequently data collection, analysis and findings may contain bias（研究者的行为可能不符合研究伦理，其结果是数据的收集、数据的分析和研究发现都可能包含偏见）

★ findings are specific to the case study（研究发现只适用于被研究的案例）

★ findings are not able to be generalized to other cases（研究发现不能被推广和普及到其他案例）

Action research(行动研究)

Action research involves a group of people with a common interest within an organization devising a plan to improve some aspect of operation or practice.（在行动研究中，一个组织中的具有相同兴趣的一组人员设计一个计划，以对运营或实践中的某个方面进行改进）
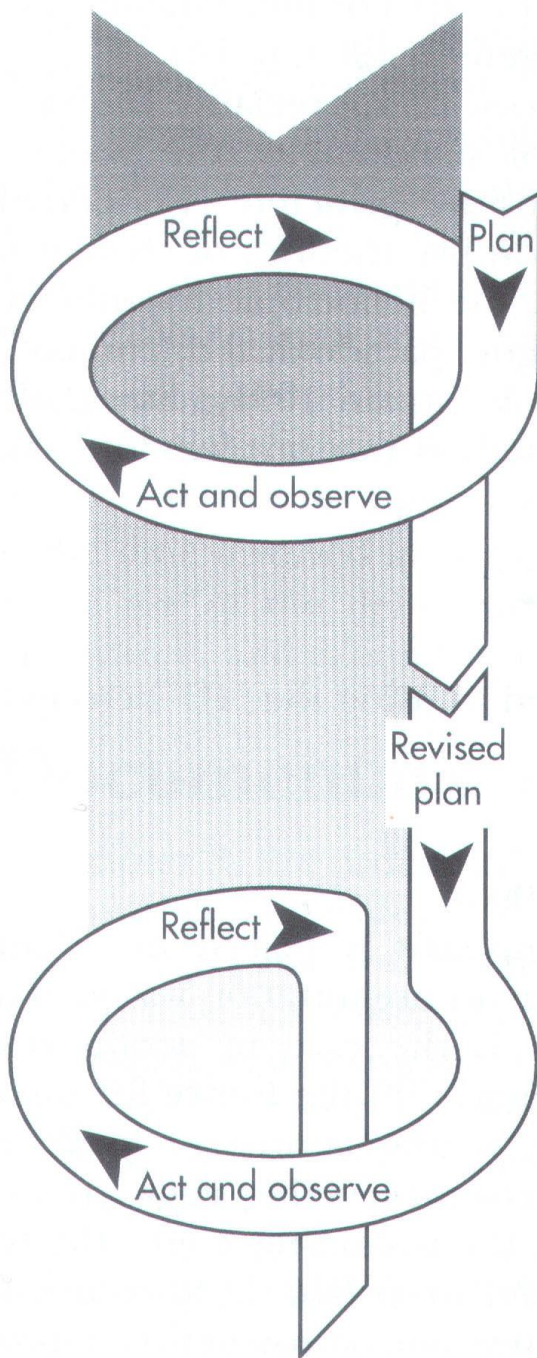
对行动研究的认识，大致有三种类型：

①为行动而研究（research for action）　也就是说行动者用科学的方法对自己的行动所进行的研究。在整个过程当中，行动者、研究者会采取各种科学方法进行研究，验证最初的假设。

②对行动的研究（research of action）　也就是行动者为解决实践中

的问题所进行的研究。此时行动研究被视作教师或其他实际工作者对实际问题的研究。

③在行动中研究（research in action）　也就是行动者对自己的实践进行反思，以达到改进行动的目的。

作为应用型研究的行动研究有其鲜明的特点：

①行动研究以提高行动质量，改进实际工作为"首要目标"。行动研究关注的不是某种"理论问题"，而是解决教育决策者、学校校长、教师们日常遇到和亟待解决的"实践问题"。

②行动研究强调行动与研究的结合。或是理论与实践相结合。从以上的三个类型，可以看出在行动研究的过程中，行动与研究是密不可分的。在实际问题的解决过程中，通过行动与研究的结合，为研究者和行动者共同参与研究和工作，为研究者和行动者的结合提供了结合点。

③行动研究要求行动者参与研究，研究者参与研究。行动者参与研究过程，在研究中反思自己的实际工作，而研究者则深入到行动现场，观察行动者和行动过程，并用行动者所能理解的语言把共同研究的成果表述出来，指导行动者的行动。行动者与研究者进行合作，缩短了理论研究与实践应用之间的距离。

④重视及时反馈。行动研究是一个螺旋式发展上升的过程，是计划-行动-观察-反思的循环。在每一个循环中，都需要对计划行动进行反思，再对计划进行修订，形成及时反馈，以便在下一个循环中进行改进。

行动研究一般过程的设计

在对行动研究一般操作程序的设计中，将行动研究视作一个螺旋式加深的发展过程，每一个螺旋发展圈中包括四个相互联系、相互依赖的环节：计划、行动、考察和反思，这有点类似于方程计算中的迭代。

◆ "计划"是行动研究的第一个环节。它以所发现的大量事实和调查研究为前提，包括"总体计划"和每一个具体行动步骤的计划方案，特别是第一、二步行动计划。

◆ "行动"是第二个环节，即按照目的和计划行动，并能不断地进行调整和变更。

◆ "观察"是第三个环节。观察主要指对行动过程、结果、背景以及行动特点的观察。为了使观察系统、全面和客观，行动研究应该使用各种有效的技术。

◆ 第四个环节"反思"既是一个螺旋圈的结束，又是过渡到另一个螺旋圈的中介。这一环节包括对观察到、反思到的与制定计划、实施计划有关的各种现象进行整理和描述，对行动的过程和结果作出评价解释，从而形成基本设想、总体计划和下一步行动是否需要修订及需要作哪些修订的判断和构想。

Advantages（优点）

◆ **participatory nature**（具有参与性）

◆ **real world context**（在真实世界的环境中进行）

◆ **the vested interest of participants in the research process outcomes**（参加者在研究过程的结果中能够获得既得利益）

◆ **the ownership of the outcomes by the participants**（研究结果归参

加者所有）

◆ **focus on finding solutions to problems**（重视发现解决问题的办法）

◆ **positive rather than problem-based world view**（采取积极的而不是以问题为依据的观点，即鉴赏性探寻）

◆ **focus on empowerment of participants**（重视让参加者获得更大的控制能力）

◆ **focus on improving organizational practices, conditions and processes**（重视改进组织的实践、条件和过程）

Disadvantages（缺点）

◆ **the outcomes being site or organization specific**（研究结果只针对某个环境或组织）

◆ **the time involved in engaging in the process**（参与的过程很耗费时间）

◆ **the use of the deficit (the red) model**（采用了有缺陷的模型、赤字模型）

Documentary method(文献方法)

The process of documentary research is presented as part of the overall discussion of secondary data sources. It is associated with the use of "mute evidence" such as written texts and cultural artifacts.（这种方法已经在讨论间接数据来源时进行了讨论。这种方法与主要采用"无声证据"，例如，文本文件和文化艺术品）

Advantages（优点）

◆ **uses non-intrusive research processes**（采用非侵入性研究过程）

◆ **enables the past and the present to be studied**（可以对过去和现在同时进行研究）

Disadvantages（缺点）

◆ **maintains an epistemological position as an outsider and is "etic" in nature**（保持一种作为局外人的认识论的立场）

◆ **the data record the past and not the future**（记录的数据是过去发生的，而不是未来发生的）

◆ **the researcher is separate from the authors of the texts in most circumstances**（在大多数情况下，研究者都是与文本的作者分离的）

◆ **there is difficulty in checking the insider's perspective, as most texts are historical in nature**（很难检验局内人的观点，因为大多数文本都是历史留下来的）

◆ **iterative readings of texts and analyzes will produce different interpretations**（对文本进行反复阅读和分析会产生不同的解释）

Non-sexist research method

(非性别歧视研究方法)

Four aspects must be considered by researchers with respect to their methods（研究者如果采用这种研究方法，一定要考虑 4 个方面的问题）：

◆ **The avoidance of androcentricity (a male only viewpoint) (男性中心)**（要避免以以男性为中心的观点）

◆ **The avoidance of overgeneralization (the study of one sex, with the findings represented as representing both sexes) (过度概括化)（要避免过度概念化，即只研究一个性别，却认为能够代表两个性别）**

◆ **The avoidance of gender insensitivity (the non-consideration of the role of gender in research findings) (漠视性别差异)（要避免漠视性别的差异，即在研究发现中不考虑性别角色）**

◆ **The avoidance of double standards (using different methods to deal with the same phenomenon) (双重标准)（要避免双重标准，即用不同的方法研究相同的现象）**

Questions and Discussions

1. Explain the key differences between unstructured interviews and structured interviews.（解释非结构式访谈和结构式访谈的主要不同点）

2. Describe the eight types of case studies applicable to tourism.（描述旅游研究中常用的 8 种类型的案例）

3. Describe the process of Delphi techniques.（描述德尔菲法的基本过程）

4. What are the major advantages and disadvantages for focus group method?（焦点群体法的主要优点和缺点是什么）

5. Discuss the four steps in action research design.（讨论行动研究设计中的 4 个步骤）

Chapter7 **Qualitative methods of data analysis**

Learning objectives:

1 reiterate the difference between qualitative empirical material interpretation/(re)construction and quantitative data analysis;

2 understand that qualitative empirical material interpretation/(re)construction occurs during three phases o research projects;

3 outline and use a number of qualitative empirical material interpretation/(re)construction methods

Key knowledge:

1. Difference and similarities between qualitative and quantitative analysis

2. Qualitative analysis

3. Data analysis methods

4. Constant comparative analysis

5. Successive approximation

6. Domain analysis

7. Event-structure analysis

8. Matrices

9. Taxonomies and typologies

10. conceptual trees

11.mind map

12. Grounded theory analysis

13. The zoom model

14．Construction theories based on China experience

Difficult knowledge:

Difference and similarities between qualitative and quantitative analysis; grounded theory

Chapter8 Quantitative methods and tourism research

Learning objectives:

1 reviews the ways the hypothetico-deductive paradigm informs both qualitative and quantitative methods;

2.overview the different types of surveys

3 explain differences between surveys and questionnaires

4 describe mail survey, telephone survey, self-completion and interviewer completed questionnaires

5 understand the key elements in constructing a questionnaire

Key knowledge:

mail survey, telephone survey, self-completion and interviewer completed questionnaires; key elements in constructing a questionnaire

Difficult knowledge:

key elements in constructing a questionnaire

1. surveys and questionnaires

2.advantages and disadvantages of different surveys

3. Comparison of survey methods

4. Questionnaire construction

Chapter9 Tourism research proposals and reports

Learning objectives:

1 describe the purpose of a research proposal;

2 outline the structure of a research proposal;

3 comment on the overall presentation of a research proposal;

4 discuss the audience considerations in research proposal writing

5 review the procedures for ethical clearance

6 outline the purpose of a research report

7 discuss audience considerations in research report writing

Key knowledge:

the structure of a research proposal; the audience considerations in research proposal writing; udience considerations in research report writing

Difficult knowledge:

1.the writing process

2. The purpose of a research proposal

3. The structure of a research proposal

4.the content of each section for a research report

5. The presentation of a research proposal

6. The purpose of research reports

7. Types of research reports

8. Audience considerations for research reports

五、各教学环节学时分配

教学时数 课程内容	讲课	习题课	讨论课	实验	其他教学环节	小计
Chapter 1 the role of tourism research	2					2
Chapter 2 Theoretical paradigm underpinning tourism research	4					4
Chapter 3 Data and empirical material sources for tourism research	4					4
Chapter 4 The ethics of tourism research	2					2
Chapter 5 Methodological considerations for tourism research	4					4
Chapter 6 Qualitative methods and tourism research	4					4
Chapter 7 Qualitative methods of empirical material interpretation /(re)construction	4					4
Chapter 8Quantitative methods and tourism research	4					4

Chapter 9 Tourism research proposals and reports	4					4
合计	32		3			32

六、课程考核：

平时作业（40%），期末考试（60%）；集中闭卷考试（必修），分散开卷考试（选修）

七、推荐教材和教学参考资源

推荐教材：

Gayle Jennings ,Tourism Research [M],Queensland: Wiley &Sons Australia Ltd,2001,6

参考资源：

1. Universal Federation of Travel Agents Association http://www.gtp.gr/TDirectoryDetails.asp?id=6605

2. Travel Agents Association of New Zealand http://www.taanz.org.nz/

3. Japan Association of Travel Agents http://www.jata-net.or.jp/english/

4. The Association of British Travel Agents http://www.abta.com/

5. Irish Travel Agents Association http://www.itaa.ie/

6. Association of Retail Travel Agents http://www.artaonline.com/

7. Hong Kong Association of Travel Agents http://www.hata.org.hk/

8. WTO.www.world-tourism.org

八、其他说明

大纲修订人：陈建斌　　　　　　修订日期：2020.12.15

大纲审定人：　　　　　　审定日期：