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Critical realist approach: A solution to tourism's most pressing matter

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Critical realist approach: A solution to tourism's most pressing matter

Tourism as a social phenomenon is still in a status of ethicality that we hope can be improved. However, we still do not know how to effectively enhance morally guided tourism. It is argued that this knowledge gap is attributed to the absence of an appropriate philosophical underpinning informing the epistemological approaches adopted in ethical tourism studies. In this paper, the author posits that critical realism is a robust and fruitful underlabourer that will help researchers to uncover the 'deep' domain of ethical tourism. It is proposed that future research should investigate 1) what structural, cultural, and agential emergent properties of the systemic components of the ethical tourism system are operant, and 2) how a generative mechanism functions to influence, not determine, the moral conduct of tourism stakeholders. By addressing these two areas of knowledge, we will be able to understand how things work in ethical tourism so that we can make changes to enhance its uptake. Some examples are provided to illustrate how a realist inquiry can be carried out. It is hoped this paper will initiate further discussions on theorizing ethicality in tourism.

Keywords: analytical dualism, critical realism, realist social theory, ethical theories, social mechanism, moral agency

Introduction

Critical realism is a contemporary philosophy of sciences developed by Bhaskar (1986, 2008, 2011, 2014) who describes it as 'an underlabourer for science and projects of human emancipation' and 'an analyst and potential critic of conceptual systems and the forms of 'social life'' (2011, p. 2). As a metatheory, it is essentially an abstract worldview of the nature of the world (ontology), the possibility of knowing (epistemology), and the methods of knowledge acquisition (methodology) (Suddaby, 2014). Critical Realism provides a set of conceptual presuppositions that substantive inquiries commit to consciously or subconsciously in their efforts to explain concrete

natural and social phenomena.

Critical realist thinking has influenced, explicitly, studies on organizational changes (Ackroyd & Fleetwood, 2000; Fleetwood, 2005), for example Easton (2010) on marketing, Mutch (2010) on strategy, Njihia and Merali (2013) on technology, and Ramoglou and Tsang (2016) on entrepreneurship. Critical realist papers in tourism studies are limited. Some examples are Botterill et al. (2013) wherein they report the mechanisms that explain the public safety network responses to assaults involving backpacker tourists, and Lau (2009) who discusses a conceptualization of authenticity from a realist perspective. Platenkamp and Botterill (2013) regard critical realism as the route to regaining ontological awareness with tourism knowledge in their framing of irrationality and rationality of the tourism reality. In essence, realist investigations in social sciences go beyond observable events, experiences, and discourses to understand the less observable processes or mechanisms that bring about reproduction and/or transformation of social forms in societies and organizations.

This paper seeks to develop a conceptual account with some methodological considerations, arguing for a realist approach for ethical tourism research. It aims to elucidate why ethical tourism research can benefit from this approach and how to conduct a realist inquiry into ethicality in tourism. To realize this aim, the paper is structured to answer three questions:

1) Why is ethical tourism research chosen as the focus of the subject content? (i.e. What is the pressing matter in ethical tourism research.)

2) Why is the critical realist paradigm a robust and fruitful candidate for ethical tourism research? (i.e. What are the reasons for it being a tool for ethical tourism research.)

3) How can such an investigation be conducted? (i.e. How to use this tool to study ethicality in tourism.)

It is hoped that this essay will initiate further debates and discussions on theorizing ethical tourism to enhance our understanding of the formation of ethicality in tourism (i.e. how things work to generate the social phenomenon of ethical tourism) so that we can develop ideas to cease or modify an existing mechanism and/or to introduce a new mechanism to improve the uptake of morally guided tourism.

The pressing matter in ethical tourism research

This section argues that the pressing matter in ethical tourism research lies in the lack of an ontologically robust and epistemologically correct theoretical foundation. The emerging discourse of ethical tourism (Hunter, 1997; Pritchard et al., 2011; Sampaio et al., 2012; Schultz, 2001; Schultz et al., 2005; Tolkach et al., 2017) has demonstrated a growing awareness and emphasis of an alternative value-laden mindset to that of economically driven tourism studies. This value-laden discourse forms an ethics platform for tourism (Macbeth, 2005).

Ethics is the philosophical study of moral values (Miller, A. S., 2003), in particular in professions (Collins English Dictionary, 2006). For Miller, ethics differs from morality whereby the latter is more than rules that guide our actions. Honderich (1995), however, suggests that ethics is concerned with the conduct of life that is guided by values which are also the root of morality. Thus, both ethics and morality are operant based on the appreciation of values, such as benevolence, honesty, and justice, and the embracing of the values. To borrow Rand's (1964) words: it is good to be able to keep or obtain what is valued - a good act; it is bad to lose what is valued - a bad act.

Subsequently, one may say: it is right to conduct a good act and it is wrong to engage in a bad act.

Hence, 'ethicality' or 'ethicalness' is concerned with human conduct that pertains to ethical and moral values and rules, some of which have been codified or prescribed as socially shared and publically accessible philosophical positions (i.e. normative ethics - how things should, or ought to, be), for instance Aristotles' virtues, Kantian categorical imperatives (Garofalo and Gueras, 1999), utilitarianism (Francis Hutcheson (1694-1746), cited in Fennell, 2018), and Confucian philosophical beliefs (Confucius, 1993). There are, of course, propositions that are internally held and practised, or held but not practised, by individuals and/or business entities (i.e. descriptive ethics). Some of these propositions may be irreconcilable with or even deviate from the socially sanctioned ethical and moral positions.

Evidence of this irreconciliation and/or deviation is well documented in empirical studies e.g. Bandura (2001), Bandura et al. (2001), and Miller et al. (2010). We always say, in tourism, it is important to consider all stakeholders' values and interests when strategies are forged through means such as government regulation and development policy (Walle, 1995). Yet, in practice, Kreps and Monin (2011) alert us to the worrying position of the moral framing of 'doing well by doing good' in organization, which reminds us of Malloy and Fennell's (1998a) finding that the majority of tourism organizations operate under economic market values. Tourists' moral frames are often featured with economic benefits and egoist values, rather than the social and environmental dimensions of sustainability (Hudson & Miller, 2005; Tolkach et al., 2017). The 'attitude and behaviour' gap among tourists and members of the public is repeatedly reported (Miller, G. A., 2003; Miller et al., 2000; Miller et al.,

2010; Juvan & Dolnicar, 2016): Individuals acknowledge the negative impact of their conduct, for example travelling by air, however, their awareness does not stop them from travelling.

This 'unmatchingness' gives a rise to the necessity of research on moral development in tourism and indeed in other social contexts too. In ethical tourism research, there are three broad approaches, namely the ethical behaviours of tourists (Hudson and Miller, 2005; Tolkach et al., 2017; Ziegler et al., 2018) and tourism organizations (Malloy and Fennell, 1998a, 1998b; Sobczak, 2006), their moral decision-making processes (Han and Hyun, 2018; He and Harris, 2014; Juschten et al., 2019; Garrigan et al., 2018; Malloy et al., 2000; Shahzalal and Font, 2018; Wu et al., 2020), and the moral development of tourism organizations (Malloy and Fennell, 1998a). The aforesaid studies are just some examples selected from literature. They have contributed to our understanding of ethical tourism in two ways: firstly, they provide some empirical accounts about observable ethical conduct by tourism stakeholders; Secondly, they have identified factors that can shape moral decision-making.

There is, however, a need for a more carefully considered methodological programme to theorize ethicality in tourism. With the exception of He and Harris (2014) and Shahzalal and Font (2018) among the aforesaid studies, engagements with moral matters in tourism studies have so far largely focused on the empirical domain of ontology (Bhaskar, 1979) i.e. individuals' and organizations' ethical behaviours or descriptive ethics, and the actual domain i.e. the codes of conduct and ethical philosophical positions or normative ethics. Yet, the 'deep' domain of moral reasoning has been insufficiently explained.

Even those that focus on moral decision-making often treat the procoss(es) as a

'black box' e.g. Han and Hyun (2018) and Wu et al. (2020). The working of the 'black box' is claimed to be based on statistical calculations, instead of meaningful explanations as to why and how inputs result in the output or how the output results from the inputs (c.f. Bunge (2004) on problem reasoning modes). The adopted alternative to the black box approach is the aligning of descriptive ethics directly with normative ethics e.g. Hudson and Miller (2005), Malloy and Fennell (1998b), and Tolkach et al. (2017).

However, normative ethics and descriptive ethics are ontologically different cultural entities whereby the former resides in the cultural structure level whereas the latter sits at the agency level (Archer, 1995, 2008). Imposing a direct link between them opens up the possibility of epistemological elision and methodological conflation, which will be elaborated on in the next section. In a realist perspective, the interactions between these two levels manifest through social mechanisms which have been neglected in ethical tourism research but will be advanced later in this paper.

Indeed, there does not seem to be a satisfactory explanation about things (i.e., mechanisms) that bring about the phenomenon that has moral and ethical relevance in tourism in the existing tourism literature - we do not fully understand why tourism stakeholders behave the way they do. There are still many questions to be answered: How does the ethical tourism system work? What are its mechanisms? How do these mechanisms function to bring about the moral pronouncements of individuals and organizations? To answer these questions, research needs to have an ontologically robust and epistemologically correct theoretical foundation, which the critical realist paradigm can provide.

Why the critical realist paradigm? The tenets of critical realism and critical realist theory

This section argues that the critical realist paradigm is a robust and fruitful reasoning tool to discover mechanisms in social reality. The following positions will be developed to support this argument: 1) critical realism's transcendental realism overcomes reductionism in knowledge production (reductionism will be further explained in the situated voices section); 2) its ontological stratification provides a comprehensive frame of reference to capture the complexity of social reality; 3) Archer's (1995) morphogenesis framework is a useful tool that allows for analytical dualism to discover mechanisms (in realist terms).

Critical realism advocates transcendental realism, insisting on the necessary distinction between the knowledge that we actually possess or our epistemology (i.e. the transitive dimension of knowledge) and the ontology that is already established (i.e. the intransitive objects of science) (Bhaskar, 2011). Bhaskar maintains that this distinction allows us to establish 'the irreducibility of knowable being ... to thought' in our attempt to explain human emancipation, which empirical realism and subjective conceptual realism have not delivered satisfactorily (Bhaskar, 2011, p. 18). In the philosophy of science, we constitute the transitive knowledge to complement the intransitive knowledge (Bhaskar, 2011). Thus, transcendental realism puts humanity in nature and permits the historical emergence and causal investigation of science itself.

In contrast, empirical realism which underpins positivist inquiries endorses real objects of scientific investigation and the objects of actual or possible experience. Bhaskar (2011) argues that 'natural' effects (e.g. an outstanding nature park) are produced socially and that social production may have absolute natural limits and conditions (e.g. a less-abled individual may face limited or no access to a scenic site).

On the other hand, subjective conceptual realism that governs constructivism posits that there is no such 'real' reality; instead, the reality is constructed by observers and thus subjective. It only accepts the products of spontaneous activity of mind that is regarded as unconstrained by sense-experience, treating all beliefs as equally valid. In fact, Bhaskar (2011) points out that in constructing the transitive objects of knowledge we must depend upon 'the employment of antecedently existing cognitive materials' (p. 18). Thus, transitive knowing (i.e. epistemology) is conditioned by our sense-experiences at a given time and by the existing intransitive knowing established before (i.e. established ontology); as such, it is unavoidably fallacious. He rightly insists that science is irreducible to an individual acquisition of the intransitive objects of inquiry, and is also irreducible to observable events and experiences.

Indeed, observable events and experiences are not equivalent to the whole truth of social reality. Bhaskar (2008) advocates a stratified ontology. In that, the knowledge of the social world has a domain of observable and experiential knowledge i.e. the empirical real, a domain of events that actually happen independently of our identification i.e. the actual real, and a domain of less observable processes that produce the events in the world i.e. the real or the 'deep' domain. In that order, examples are: tourism stakeholders' ethical behaviours; the codes of ethics for tourism and the (in)consistencies between Aristotle's virtue ethics and Confucian positions; and the structural, cultural, and agential mechanisms, which will be discussed in the next section.

Critical realists argue that the human world is an open system and that in this system the patterns of events and discourses are irreducible to the individuals and/or collectivities involved. A constant conjunction, or indeed empirical invariance, is only a sufficient condition instead of a necessity for a causal law to operate (Bhaskar, 2011).

Most of reality is unobservable (Bunge, 2004) and is produced by social relations and mechanisms derived from the structure and human agency, such as people's reflexivity, creativity, and actions (Ezzamel et al., 2004; Karlsson, 2011). In other words, critical realists do not reject phenomenology, however, realists argue for an understanding of the 'deep' domain of reality.

Building upon Bhaskar's critical realism, British sociologist Margaret Archer has developed a morphogenetic approach to explain social formations. Her substantive theory, Realist Social Theory, comprises four volumes of key writings: Archer (1995) on structure, Archer (2008) on culture, Archer (2000) on agency, and Archer (2012) on reflexivity. Archer (1995) rejects the individualist and collectivist conceptions of social reality because they cover a limited time span of knowledge production. She explains that in individualism, 'upwards conflation', or Model I (Bhaskar, 1986), occurs where structure becomes the inert and dependent element of the resultant domination or objectification; on the other hand, in collectivism, 'downwards conflation', or Model II (Bhaskar, 1986), takes place where structure sweeps over agency through processes of regulation and socialisation. Archer maintains that the conflations and their methodological approaches mandate epiphenomenalism, blocking an examination of the interplay between structure and agent over time. Thus, neither of them can furnish the basis for adequate social theorizing of social reality.

Archer (1995) also criticises the epistemological error of central conflation, or Model III (Bhaskar, 1986). She points out that in this 'elisionism' the structure and the agent elide. For example, Bourdieu (1990) and Giddens (1979, 1990) replace the dualism of agent and society with an insistence upon their mutual constitution through notions of 'habitus' and 'practice' respectively. For Giddens, structure and action are two sides of the coin. Yet, Archer argues that such an elision blocks any comprehensive

analysis of their interplay over time. Thus, Archer's morphogenetic approach distances itself from individualism, collectivism, and elisionism.

For Archer (1995, 2000, 2008, 2012) and Bhaskar (1986, 2011), structure and agents operate over different time periods: structure necessarily predates the actions which transform it and structural elaboration necessarily postdates those actions. Structure is pre-existent with independent causal influence before, during, and after actions. The causal laws are real and do not depend upon instantiation as advocated by Giddens and his followers (c.f. Giddens, 1990; Giddens & Sutton, 2017; Stones, 2005). Archer posits that at a given time, social reality can be analytically separated into the levels of structure and agents' actions, and that in each domain of social reality (i.e. of structural, cultural, and agency) social formation(s) undergoes a morphostasis (i.e. reproductive) / morphogenesis (i.e. transformative) cycle that involves sequential phases of conditioning, interactions, and elaboration. These emergent social relations themselves have causal properties that constitute the structure of the next morphostatic/morphogenetic cycle.

Thus, Archer (1995) insists analytical dualism, which is a methodology based on the 'historicity of emergence' (p. 66). It is grounded on two premises: 1) the stratified ontological view of social reality and the emergent properties of structures and agents which are irreducible to one another; 2) given structures and agents are temporally distinguishable thus it is justifiable and feasible to discuss pre-existence and pasterriority when examining them separately. Such a separation allows the analysis of the interplay between the two levels over time.

In the realist perspective, mechanisms have ontological existence and operate even if they are unknown or empirically unidentifiable (Archer, 2015; Bhaskar, 2011; Bunge, 2004; Wight, 2015). Gorski (2015) remarks that: a realist social mechanism is

not a supplement to a relationship between two events or variables in positivism; it is not limited to individual actors being the basic building blocks of all causal mechanisms that connect causal variables; it is not a cause to be an object followed by another object (i.e. counterfactual dependency in structural equation modelling); it is not a composition of chains or aggregations of habitual responses of the actors who are confronting problem situations. Neither is it a statement about experiences or events (Wight, 2015).

Instead, a mechanism is a causal law or a way of acting of a thing (Bhaskar, 2014). It explains how a given correlation works, rather than simply saying that such a correlation is statistically significant, within the flux of the social order that comes in a SAC ('structure', 'agency', and 'cultural') (Archer, 2015). In other words, its explanation is not dependent upon empiricism but a stratified and ordered ontology of reality. When citing a law, we refer to the transfactual activity of the mechanisms, instead of claiming the actual outcome, which will be co-determined by the influences of other mechanisms in general (Bhaskar, 2011). Indeed, generative complexes (Bhaskar, 1986, 2008) can occur: the tendencies of mechanisms may be unexercised, exercised unrealised, and undetected. Thus, it is a tendency that causal laws must be analysed as; in other words, deterministic causal laws are rejected in realist accounts.

In short, critical realism goes beyond observable events, experiences, and discourses to reveal and understand the less observable 'deep' domain of reality (i.e. mechanisms) that brings about growth and change in science and society. As Bhaskar (2011) said, we will only be able to understand (and so change) the social world if we can identify the structures at work and understand how they generate the events or discourses that are under investigation. In other words, if we can identify the mechanisms and understand how they generate ethicality in tourism, we will be able to

understand the phenomenon so that we can make changes to enhance the uptake of ethical tourism.

How can a realist investigation into ethical tourism be conducted?

This section advances the proposal of a realist approach for ethical tourism research from the methodological perspective, by addressing three interrelated aspects: theory-laden, thought operations and research procedures, and the situated voice. Realist research does not have specific methods that must be applied. However, these three aspects shall be considered by the researcher in deciding how to go about her/his project. They are relevant not only to realist analysis of ethicality in tourism, but also any realist attempt to explain other social phenomena. In essence, a realist inquiry is theory-laden with the use of reasoning modes of abduction and retroduction. It can adopt intensive and/or extensive research procedures without disregarding the situated voice of the researcher. For comprehensive accounts on doing realist research, readers are encouraged to consult Sayer (1992), and Danermark, Ekström and Karlsson (2019).

Theory-laden

Critical realist research is theory-laden (but not theory-determined). Critical realism prioritizes ontology over epistemology, yet it encourages a dialogical transcending process from the intransitive objectives of knowledge to that of the transitive, and vice versa in scientific knowledge production. Different sets of intransitive knowledge have their own strengths in providing an explanation of a phenomenon from their respective perspectives. Thus, an interdisciplinary approach is encouraged in realist research (Danermark et al., 2019). Figure 1 presents a critical realist framework for ethical tourism research, incorporating Archer's (1995, 2000, 2008) realist social theory from the sociology discipline, Bandura's (1991) social cognitive moral theory from the socio-

psychology discipline, and ethical theories from the philosophy discipline.

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Following Archer (1995, 2008), structure, which includes social structure (SS) and cultural system (CS), has actual forms of social organization with their own powers, tendencies, and potentials. Its generative powers are exerted to the socio-cultural interaction (S-C) level when they are activated by agents' actions. Normative ethics, such as the moral principles advocated in egoism, hedonism, unitarianism, and Confucianism, are the cultural items at the CS level. These items have emergent properties that constrain and/or facilitate the actions of individuals and collectivities (i.e. relationship *a* in Figure 1). This relationship of conditioning also applies to SS. In other words, relationship *a* informs the structural and cultural processes exerted from the structure level, which may, or may not, be identified by agents.

At the S-C level, individuals and collectivities find themselves in a social position that is given from the past, yet have certain powers to make a difference. We, of course, cannot make whatever we want out of the world - our agencies are constrained by our physical and cognitive capabilities, as well as our access to external materials and resources (Archer, 2000). Nevertheless, our abilities, such as reflexivity, moral reasoning, and self-efficacy, not only define who we are as agents but also empower us to maintain and change our surroundings vis-à-vis our concerns. Thus, relationship *b* is not only concerned with structural and cultural social mechanisms but also human agencies.

Thus, in this emergentist perspective, the emerging properties of structure, culture, and agent have generative powers to bring about the patterns of moral pronouncement, part of which regenerates the existing structure forming ethicality in

tourism, and part of which transforms it. The resultant structure becomes the given one for the descendent cycle of ethicality formation. In short, the framework proposes the possible perspectives for the identification and explanation of processes engineered by the emerging properties of structural, cultural, and agential that bring about moral pronouncement(s). A realist inquiry into ethicality is to identify them and understand how they operate to reproduce and/or transform the system of ethical tourism.

Structural social mechanisms: Structural properties and relationships a and b

Bhaskar (1986) has discussed 'complex entity' which consists of constituted parts, their properties, the structural relations between the parts, and other material things that exist in the environment of that entity. Indeed, reality can exist in various modes: the materially real (e.g. an ancient building), the ideally real (e.g. normative theories), the artifactually real (e.g. the global digital economy), and the socially real (e.g. descriptive ethics) (Bhaskar, 2008). Tourism is such an entity, comprising 1) agents and actors, such as tourists, members of communities, and tourism organizations; 2) the interactions among them at various levels, and indeed across the levels, ranging from communities, sub-organizations, corporations, industry associations, intergovernmental bodies, to the United Nations; 3) the interactions of the individual agents and the collectivities with other related ecological, socio-cultural, technological, economic and political systems; and 4) the generative powers of all those interactions and constituting components. In short, all the constituting components of this entity interact with one another. These relational processes of interactions co-determine the social patterns of tourism, within which, ethical tourism is centred on moral and ethical thoughts, dialogues, and actions that are necessarily engineered by our human nature of moral reasoning and unavoidably conditioned by the powers of the natural and social

systems. Because of this complexity, 'doing good' in tourism is probably more challenging than in other contexts.

From the structural mechanism perspective, one research direction can focus on the artifactually real, such as information communication technology applications which are now a significant aspect of the tourism system. Powers exist in technology development and adoption. In other words, technologies are not value neutral. As emerged from the author's ongoing research on ethical tourism in China, the discourse of 'civilized tourism' is promoted nationally in China via platforms such as websites and social media in addition to TV channels and educational materials posted on public transport. The network of media, in particular the proliferation of Web 2.0 technologies, are used to disseminate socially accepted behaviours to the public, but also make it possible for individuals and organizations to exchange ideas and experiences, which in turn further support the functioning of its existing technological systems.

Employed technologies (including both hardware and software) as part of the media network form a structure which conditions the social interactions. The functionalities of the technologies and the backbone of the Internet protocols are the necessary constitutive components, which facilitate certain online interactions while constraining some other exchanges of information and ideas. Global connectivity sought by the Internet accelerates virtual interactions and interest struggles among the users, corporate agents, and political players. Value-laden interests are either promoted, or rejected, or silenced through the processes of programming, hardware design and production, and/or political sanction. These struggles are often less observable to the users but have generative powers of facilitation or inhibition on their actions. At this point, the analysis of the causal mechanisms exerted from the social structure level (i.e. structural mechanisms) seems to be synonymous to the analysis of the ideas (i.e.

cultural items) held by involved parties, but actually the analytical focus here is on how the parties exercise their respective powers to secure or advance their positions through mobilizing their held idealisation and physical resources. By focusing on the structural mechanisms in the artificial realm, new knowledge about the formation of technology-mediated ethical tourism can be acquired.

Cultural social mechanisms: Cultural properties and relationships a and b

Archer (2008) posits that cultural items at the CS level have logic relationships with each other: intellectual positions distinguish each other by addressing their own distinctiveness (i.e. inconsistency or contradiction) whilst some positions are complemented by some elements of other ideas (i.e. consistency or complementarity). Thus, Archer argues that contradiction and complementarity are the properties of cultural items at the CS level. These properties are evident in ethical theories. For example, individualist ethical theories (e.g. virtue ethics) highlight the traits of a morally sound individual, such as moderation, order, resolution, industriousness, honesty, humility, courage, and justice (Cooper, 1987; Rand, 1964). For Aristotle, virtue is an outcome of one's conscientious choice to select the middle course between excess and deficiency (i.e. the golden mean) and thus eudaimonia can occur afterward through a life of active contemplation (Fennell, 2018; Foot, 1959). One of the distinct features of Confucian philosophy (Confucius, 1993) is the virtue of 忠孝 [zhōng xiào], in that '忠' means being loyal to one's nation and/or the authority whilst '孝' refers to respecting one's older generation and ancestors. While individualist ethics tend to emphasise one's well-being and the perfecting of self in order to be a morally sound individual (i.e. self-realisation), for those who advocate collectivist ethics, virtue ethics is concerned with one's ability to manage or overcome self-interest in the care of others,

one's community and environments (i.e. the social solidarity) (Soifer, 2009). In spite of the inconsistency in terms of their respective focus, many traits are valued in both Eurocentric virtue ethics and ancient Confucian virtue ethics (c.f. Chen, 2017). A shared position among Aristotle, Confucius, Mengzi, and Zhuangzi is that virtues must be nurtured so that the good end can be achieved.

Ethical theories hold different positions of priority with regards to moral rules and principles. Individualist moral theories, such as existentialism and Foucault's (1997, 2005) theory of self, advocate that ethical decisions should be made on the premise of one's own subjective value set, not on the basis of prescribed ethical theories or moral authorities. Likewise, egoism and hedonism highlight the moral rule of 'the greatest good and least amount of pain for the individual' (Fennell, 2006, p. 71). Collectivist ethical theories, on the other hand, often promote 'the greatest good of the greatest number' (i.e. end-based utilitarianism) (Francis Hutcheson (1694-1746), cited in Fennell, 2006, p. 68). Utilitarianism focuses on the consequences of conduct or non-conduct, based on a cost and benefit calculation which is widely used in tourism development and policy-making. In the same vein, advocacy tourism studies and the sustainable development discourse (Jafari, 2001) strive to find solutions to maximise the 'good' of tourism (e.g. the benefit of tourism) and minimise the 'bad' (e.g. the cost of tourism).

Human values, purposes, and interests are often irreconcilable (Weber, 1949, cited in Watson, 2003). At the S-C level, individuals' desires, morals, benefits, and outlooks are important social psychology aspects of tourism (Lam & Hsu, 2004; Xu et al., 2013; Yousaf et al., 2018). Personal experience of encountering 'beauty' while travelling can be an individual fulfilment with negative consequences on the environmental, socio-cultural, and economic dimensions (Tribe, 2009). Ideas of self-

cultivation and the public good do, sometimes, stand in tension with each other in tourism.

When the irreconciliation of moral values occurs, one faces the task of adopting certain rules to prioritize certain value(s) over other values: to benefit oneself (egoism), or to benefit a group (collectivism), or to benefit one or more others (altruism) or to uphold principles of the greatest good for the greatest number (principlism) (Batson, 1994). Rorty (1989) discusses self-realisation and social solidarity: the former is concerned with the ideal outlook of a person whereas the latter is concerned with an ideal form of society. This inconsistency means it is not possible to achieve self-realisation and social solidarity spontaneously because society is a ground where an individual's freedom to pursue personal fulfilment needs to be constrained so that equal opportunity for everyone to pursue self-realization becomes possible (Rorty, 1989). Indeed, philosophers have attempted to establish a common ground that individuals value and argue that it is in the best interest of all to subscribe to rules that are 'well-grounded' and 'justified' (i.e. complementarity).

For instance, Kant coins three categorical imperatives (absolute commands), which essentially state that: 1) only those who are capable of rational reasoning are able to make moral decisions; 2) universal laws are to be followed with no exceptions; 3) people are free and equal participants in a conflict-free pursuit of their own ends (Garofalo & Gueras, 1999). The Kantian position is that goodwill is the underlying drive for people to do good for the benefit of a society that permits free and equal individuals to pursue conflict-free personal interests, and that the universal commands can make the ideal society possible (cited in Fennell, 2018). The good of the collective is that it provides 'a truly consistent world … in which each person acts in accord with

the "idea of the will of every rational being as a universally legislative will'" (Garofalo & Gueras, 1999, p. 72).

One orthodox claim has been that moral principles are to guide or regulate human behaviours, however, in practice or at the S-C level, things are far more complicated than the ideally real. At the individual level, research has found the nonuniformity of moral reasoning, which will be discussed in the moral agency section. At the level of collectivity, research also reveals that different cultures have different customs that are premised on different value sets. For example, Rountree et al. (2014) report that there are differences in ethical positions in relation to social norms, religion, and socio-economic development across the cultures of America, Romania, Poland, and the Czech Republic. Confucian heritage communities, such as that in China, Hong Kong, Japan, South Korea, and Singapore, share some core Confucian values due to historical connections; however, variations do exist among these communities because of social and political movements and economic developments over the years (Li & Rivers, 2018). Indeed, moral standards are not universal (Blackburn, 2001; Edel, 1964) even though a universal commandment (i.e. the golden rule of equality) is found in both secular and religious doctrines in many societies (Donovan, 1986). The morality of conduct is subject to its compliance to socio-cultural circumstances. Conduct that is considered ethical in one society may be deemed unacceptable in another community. Can we reconcile the differences? Or, do we need to do so? The answer is probably that we do not need to reconcile them because moral values and rules are often irreconcilable. It is probably more productive to embrace the differences and to understand how their properties (contradiction and complementarity), emerged from social relations, act back upon our actions, and thus in turn existing mechanisms can be modified and/or a new mechanism can be introduced to bring about positive change.

Moral agency: Agential properties and relationship b

Human agencies have generative properties such as their reflexivity (Archer, 2012) and moral reasoning (Bandura, 1986) that enable people to formulate projects to protect and sustain their interests. Agents operate autonomously following the situational logics of actions such as correction, protection, and opportunism (Archer, 2000). Agents in ethical tourism are individuals who share the same life changes in terms of benefiting from, and being constrained by, ethically and morally guided interactions in tourism. Some of these primary agents voluntarily choose social roles to occupy such as tourists, visitors to destinations, employees and managers in tourism organizations. Some agents' involvement in tourism, on the other hand, is sometimes involuntary in nature because, as a result of tourism development, they have been placed in a position of local residents whose normal living environment has become the 'playground' of tourists. Individuals and collectivities have their own interests which are external to their roles but can be pursued through their roles. For instance, to minimise negative impact on a local culture, tourists can play an active role through respecting the local customs during their visit.

At the individual level, moral agency is exercised through self-regulatory mechanisms of self-monitoring of conduct, evaluating the conduct in relation to one's internalized moral template and environmental circumstances, and affective self-reaction (Bandura, 1986; Rottschaefer, 1986). There is no uniformity in moralization (Bandura, 1991, 2001; Bandura et al., 1996; Bandura et al., 2001; Bandura & Jourden, 1991). In the process of moral framing, one evaluates and weighs multiple moral rules and standards in a given situation; in that, certain rules and standards are given priorities over the others depending on the circumstances (Bandura, 2001). This process involves social sanctions and self-sanctions, both of which play a prominent role in the

development of the pursuit of socially valued life choices (Bandura, 2001; Ruedy et al. 2013). In social sanction, one refrains from transgressive conduct in anticipation that such conduct will result in social censure and other adverse consequences. In self-sanction, one pursues a moral conduct because doing so will generate self-satisfaction, self-respect or self-reproof (Bandura, 1991). Thus, both modes of sanction are closely related to one's ability for reflexive reasoning. Indeed, our reflexivity possesses subject powers in mediating the role that objective structural and cultural powers play in influencing social action (Archer, 2012).

Often, when we face conflicts wherein we are socially pressured to pursue an action that violates our personal moral rules, we tailor our behaviours to fit what the given situation appears to call for. This is known as pragmatic moralization (Bandura, 1991; Graf et al., 2019; Kreps & Monin, 2011; Miller, 1999; Noval & Hernandez, 2019). Thus, moral sanctions involve self-negotiation between self-interest and that of others, and between one's internalized moral system and external moral value systems, both of which can mirror, to varying degrees, normative ethics and descriptive ethics. In essence, this process of self-negotiation makes references to moral values and rules to sustain and/or acquire what is valued.

It is also worth noting that, according to Bandura (1991), affective self-reaction affects our moral decision making. In the same vein, Hoffman (1991) argues that empathic effects are congruent with caring and justice, both of which are major moral principles in Western societies and thus they may provide motivation for the application of the principles in moral judgement and behaviour. Likewise, Gibbs (1991) comments that empathy, justice, and social interaction contribute to the formation of internalised morality. A more recent study by Font et al. (2016) reports that one's level of empathy with sustainability contributes positively to the acceptance of a responsibility to be more

sustainable. Thus, emotions are also a moral agency for motivation to engage in moral and ethical tourist conduct.

Thought operations and research procedures

The aim of a realist investigation is to find out how things work below the surface i.e. to provide an explanation of a social phenomenon of interest. Abduction and retroduction are very important modes of scientific reasoning in the explanatory endeavour (Fletch, 2017; Danermark et al., 2019; Sayer, 1992). Abduction is an inference wherein theoretical re-description or re-contextualization is exercised. Ideas conveyed in Figure 1 demonstrate this thought operation - the ethical tourism phenomenon is re-interpreted from three sets of intransitive bodies of knowledge (i.e. realist social theory, social cognitive moral theory and ethical theories). In contrast, retroduction is an inference wherein causal properties and mechanisms are identified and specified (Danermark et al., 2019). It involves the re-construction of the basic conditions for the phenomenon under investigation from a description and analysis of concrete events. By way of abstraction, retroduction provides knowledge of transfactual conditions, structures, and mechanisms that cannot be observed directly. It enables a transcendental argument to be developed. Abduction and retroduction allow us to see hidden connections and underlying structures that are not immediately obvious in empirical observations.

Further, in the explanatory endeavour, one can take intensive and/or extensive research procedures. The former focuses on a particular case or just a few cases, looking at how individuals and/or collectivities who are involved experience and interpret the event or process; it is where retroduction plays a vital role, thus it is more important for detection of the causal mechanisms than an extensive procedure (Danermark et al.,

2019). In other words, intensive procedure has a higher explanatory power than extensive approach as it can reveal the underlying mechanisms and how they interact with other mechanisms in a given context. In contrast, extensive procedure deploys quantitative methods so as to describe demi-regularities (i.e. how frequent a phenomenon is), frequencies, patterns, and characteristics of the phenomenon, thus it allows statistical generalization.

In retroduction, the development of the transcendental argument is not necessarily linear. Carter and New (2004) and Botterill (2007) suggest horizontal and vertical explanations. The former is concerned with shifting from the level of occurrences to be explained to that of mechanisms and structures which generate them whereas the latter is concerned with explaining the mechanism or structure that is shown to 'the product of another, more basic one' (Botterill, 2007, p. 123). The 'horizontal explanation' is rather confusing and misleading because a mechanism can involve the co-functioning of some properties from another level (i.e. the SS or CS or S-C or the agential level). Archer (1995, 2008), instead, provides a clearer direction: one can first investigate the structure level and the S-C level separately, and then look into the relationships a and b (see the theory-laden section).

Some scholars have used grounded theory for critical realist research, arguing that critical realism and grounded theory are highly compatible as they both attend to evidence and meaning, individual agency and social structure, theory-building and the pursuit of practical emancipatory/transformational goals (Oliver, 2012; Redman-MacLaren & Mills, 2015). However, Fletcher (2017) argues that a flexible/directed deductive approach is more consistent with critical realism's ontology and epistemology than grounded theory which is more inductively-oriented. The author of this paper agrees with Fletcher. As said previously, realist research is theory-laden. It involves

theoretical re-description of the phenomenon under investigation. Thus, method(s) to be adopted needs to have the capacity to allow a flexible and directed approach to data. In the author's own research practice, framework analysis (Ritchie et al., 2003) is found to be very useful because it allows both inductive and deductive coding so that data can be analysed and interpreted in relation to the theory(-ies) that the research is premised on and at the same time it provides room for new perspective(s) to emerge from the data.

The situated voices

Critical realism endorses the idea that social practices are concept-dependent, action-dependent, and context-dependent; yet it foregrounds ontology over epistemology. It rejects four tendential reductions of knowledge (Bhaskar, 2011):

- that of the transitive object of knowledge to intransitive object of knowledge;

- that of the intransitive object of knowledge to the transitive object of knowledge;

- that of the transitive dimension or process of knowledge production to the transitive object of knowledge;

- that of the transitive object of knowledge to the process of knowledge production.

These tenets give rise to the importance of the situated voices of realist researchers in knowledge production. In that, the situated voices or the product of thoughts and its emergence or the process of the production reflect the 'complexities, gaps and negotiations between the researcher and the researched' (Ateljevic & Swain, 2006, p. 1250, cited in Botterill, 2007). Botterill also reminds us of the danger of epistemic fallacy and slipping into relativist ontology in knowledge production. The

critical realism's ontological commitment (i.e. transcendental realism) connote that our transitive knowledge is expressed in the writer's or theorist's own description, which are necessarily limited or fallacious. A realist researcher needs to be ready to modify or even abandon their propositions developed in abduction. In other words, realist researchers need to be critical about what they are claiming - not to reduce ontology to epistemology or vice versa.

Botterill (2007) has rightly pointed out that 'the judgement on the contribution of the situated voices to tourism studies lies not in the efficacy of the method but in the practical adequacy of its outcomes to explain the intransitive object' (p. 125). He maintains that epistemic gains in accessing the 'real' intransitive object of the social world can be made once we work upon the empirical realm of the voices (as we sense the data) and that of the actual realm (recounted events through the voice). In her own research practice, the author of this paper monitors her interpretation of participants' accounts vis-à-vis the differentiated, ordered structure of social reality advocated in critical realism: is this event or situation a product resulted from the emergent property(-ies) of the structural, cultural or agential level? Often, a social formation is co-determined by generative powers from all these levels, which makes the matter of the situated voices even more vital in realist research. This practice can help the researcher develop an adequate explanation about 'how things work'. By being critical about our own description and monitoring the emergence of our epistemology in relation to the realist conception of social reality, we build a 'safe net' preventing potential slipping into the relativist philosophical position that results in tendential reductions of knowledge.

Conclusion

This paper has highlighted the pressing matter in ethical tourism research: the absence of an appropriate underlabourer in existing ethical tourism research (e.g. Haller, 2017; Kim et al., 2017; Malloy & Fennell, 1998a, 1998b; Malloy et al., 2000; Preuss, 2010). Franklin (2007) comments that the problem with tourism theory is that 'we need [a] new theory (how do we uncover aspects of tourism that remain otherwise obscured)' (p. 131). Indeed, the phenomenological approach in prior ethical tourism research has been ineffective in developing knowledge about how ethicality works in tourism. We do not really know how to effectively enhance ethical tourism. The paper has argued that the critical realism paradigm is an appropriate and fruitful underlabourer that will help ethical tourism researchers to find lawful mechanisms. The paradigm as a tool permits an ontologically robust, epistemologically correct, and methodologically feasible empirical investigation.

Morally guided tourism is fundamentally concerned with the pursuit of morally right and socially acceptable interactions in the system of tourism, which requires us to 1) identify the generative properties pertaining to the SS, CS, S-C, and agential levels, and 2) understand the mechanisms that make things work. The paper proposed three perspectives of realist investigation into ethical tourism research, namely structural, cultural, and agential mechanisms. As Bunge (2004) has expressed, 'the hallmark of modern science is the search for lawful mechanisms behind the observed facts' (p. 207). Once we can explain how the ethical tourism system works, practical solutions can then be developed to help the industry to exercise better morally and ethically-informed practices thereby benefiting both industry stakeholders and society as a whole. It is hoped that the effort made in this paper would contribute to Franklin's (2007) call for a better way to uncover the unknown.

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Figure 1 A critical realist framework for ethical tourism research