Annals of Tourism Research 76 (2019) 91–104

Contents lists available at ScienceDirect

Annals of Tourism Research

journal homepage: www.elsevier.com/locate/annals

Transformative tourism organizations and glocalization

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ARTICLE INFO

Associate editor: Jennie Small

Keywords:
Transformative tourism
Glocalization framework
Designing experiences
Practitioners
Life changing
Community development

ABSTRACT

This paper investigates how self-described transformative tourism practitioners engage with tourists and local stakeholders to provide what they perceive as a transformative experience for tourists via the use of glocalization strategies. Transformative tourism practitioners are constantly in search of nimble and sophisticated processes that acknowledge the viewpoints of both travelers and the local communities. They do this through glocalization strategies, which focus on designing experiences that celebrate the local cultural context while also taking the travelers' worldviews into consideration. An analysis of 37 in-depth interviews and organizational documentation reveals 16 glocalization strategies used to achieve three objectives: establish legitimacy in the local community, break down cultural barriers in the organization, and stage transformative encounters.

Introduction

Self-described transformative tourism practitioners aspire to trigger a change of worldview in travelers. Although mainstream tourism can also result in transformation, transformative tourism organizations purposefully design their experiences so that 1) the traveler is purposefully taken out of his or her comfort zones, 2) travelers are encouraged to be more tolerant and understand others' worldviews and question their own intrinsic values, 3) there are powerful cognitive and psychological implications that go beyond simply having an encounter with residents, and 4) travelers' attitudes and behaviors are influenced such that they see themselves as agents of change beyond the experience (Kirillova, Lehto, & Cai, 2017c). In pursuit of these outcomes, transformative tourism organizations are constantly in search of processes and frameworks that are nimble enough to take into considerations travelers' past experiences, local community contexts, and program design elements (Park & Santos, 2017). Practitioners must find an appropriate balance between novelty and safety to spark self-reflection, encourage personal growth, and create opportunities for meaningful interaction between travelers and residents (Kirillova, Lehto, & Cai, 2017a; Taylor, 1994).

There have been calls to further explore managerial strategies or frameworks that support the development of meaningful and equitable transformative experiences (Robledo & Batle, 2017; Walter, 2016). The current literature raises the question of whether transformation is serendipitous or can be planned by practitioners and what types of strategies are used to coach travelers through their transformation (Kirillova et al., 2017a) while focusing on the needs and priorities of the community. To date, most studies have explored transformative tourism from the point of view of the travelers (Kirillova et al., 2017c). Few have examined it from the perspective of practitioners (Robledo & Batle, 2017). Understanding practitioners' perceptions is crucial to identifying strategies that strike the right balance between comfort and adventure and provide experiences that match the desires of both travelers and local

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https://doi.org/10.1016/j.annals.2019.03.007
Received 14 July 2018; Received in revised form 7 March 2019; Accepted 16 March 2019

residents. The glocalization framework has great potential as a strategy for transformative tourism practitioners, as it strives to reduce the global/local divide, empower residents, and boost the local economy by combining international business acumen with socially responsible and culturally sensitive practices (Minei & Matusitz, 2013).

Our study examines the usefulness of *glocalization* strategies by self-described transformative tourism practitioners (tour operators, program directors, and entrepreneurs). The *Oxford Dictionary* defines glocalization as "the practice of conducting business according to both local and global considerations" ("glocalization", 2018). Glocalization strategies are used by organizations to adapt their often cross-cultural and trans-national products or services to the specificity of the local context. From a managerial perspective, glocalization strategies involve two important processes: 1) integrating organizational practices to match the context and cultures of residents and gain their support; and 2) encouraging loyal support from travelers by understanding their desires, being mindful of cultural differences, and crafting services that fit their expectations.

We adopt a qualitative approach in this study, conducting interviews and analyzing websites and documents to investigate how self-described transformative tourism practitioners engage with tourists and local stakeholders to provide what they perceive as a transformative experience for tourists via the use of glocalization strategies.

Transformative tourism

Reisinger (2013) defines *transformative tourism* as delivering "experiences [that] allow the development of awareness of one's own existence and connection with self and others," encouraging people to achieve their full potential (p. 27). Reisinger further describes the process as follows: "during transformation the individual not only develops a feel for the visited place, but also forms a deep sense of identification with the place and experiences oneself as belonging to this place, to others, and to the world" (Reisinger, 2013, p. 30). Transformative experiences differ from other forms of tourism in the sense that they are based on extraordinary events that push travelers to reevaluate their perceptions of the world in a permanent and life-changing manner (Kirillova, Lehto, & Cai, 2017b). Examples of transformative tourism programs include, but are not limited to, mindful travel, volunteer tourism, study abroad, and pilgrimage-related trips (Reisinger, 2015).

Building on the earlier work of Mezirow (1991) on transformative learning, Wolf, Ainsworth, and Crowley (2017) developed a conceptual model that includes triggers of the transformative process and their outcomes. They suggest four dimensions of transformative tourism experiences: "1) [a] disorienting dilemma, 2) self-reflection, 3) resolution by exploring new actions, and 4) development of new skills, attitudes and beliefs" (Wolf et al., 2017, p. 1664). For example, travelers may face a disorienting dilemma in the form of being confronted with extreme poverty or other social, cultural, natural and/or politically intense situations for the first time (Walter, 2016). Through self-reflection, they can resolve internal conflict by considering how their privilege has shaped their worldview and the way they interact with others (Wolf et al., 2017). Through guided self-reflection methods, such as journaling or group conversations, travelers may reach an epiphany and resolve to act differently (Coghlan & Gooch, 2011; Wolf, Stricker, & Hagenloh, 2015).

The third dimension of Wolf et al.'s (2017) model is resolution through exploring new actions. These actions may include becoming more politically active or contributing to specific charities. Robledo and Batle (2017) suggest that this dimension can be facilitated through sharing, solidarity, and meaningful social interactions with both residents and fellow travelers. Feelings of social connection can enhance travelers' desire to take action on their own to address and apply what they learned from the disorienting dilemma and self-reflection (Wolf et al., 2015).

The last dimension of Wolf et al.'s (2017) model is the development of new skills, attitudes, and beliefs. Ultimately, the aim is for travelers to attain new skills and adopt more inclusive worldviews. Transformative tourism, at least the Weberian ideal type, can strengthen existing understandings or shift previously uninformed perceptions of the global/local intersection. Reisinger (2013) and Noy (2004) refer to this outcome as long-term competence-building and activism. Transformative skill development can include a broad gamut of physical and mental capabilities, such as language proficiency, cross-cultural understanding, sportsmanship, endurance, tolerance, and social skills (Kirillova et al., 2017b; Knollenberg, McGehee, Boley, & Clemmons, 2014; Noy, 2004) or can take the form of engagement back home in ecological, spiritual, or artistic projects that express new competencies (DeCrop, Del Chiappa, Mallargé, & Zidda, 2018; Germann Molz, 2016; Wolf et al., 2015).

Like other forms of niche tourism (e.g., eco-tourism, volunteer tourism), the label of transformative tourism can be co-opted, emptied of its substance and used as a marketing ploy by tourism practitioners. As with eco-tourism, transformative tourism may involve providing educational information about consumption and tolerant behavior at the destination, but the travelers may nonetheless not adopt these sustainable behaviors (Wheeller, 1991). This shortcoming may be most likely to occur when tourism practitioners do not offer sufficient emotional support during the disorienting dilemma and/or fail to incorporate sufficient time for self-reflection, leading travelers to reinforce their prejudices rather than confront them (Illeris, 2014). Walker and Moscardo (2016) argue that transformative tourism research should ideally help practitioners with the difficult task of enabling participants to adopt a global perspective. While past transformative tourism studies have focused on demand (Knollenberg et al., 2014), few studies have explored what practitioners think is needed to create settings that are conducive to transformation and coach travelers through the emotional ups and downs of transformation. Our study investigates how self-described transformative practitioners create programs, develop activities, and train employees to lead travelers through their disorienting dilemma, encourage them to engage in critical thinking, and set them on a path of self-growth via the use of glocalization strategies. The present study thus expands operational and theoretical knowledge regarding managerial and strategic approaches to the development of transformative experiences.

Glocalization strategies and transformative tourism

Glocalization was proposed by Robertson (1995) as a framework to explore how local communities can more effectively capitalize on global exchanges. Glocalization entails examining how organizations can successfully expand their market in new countries by culturally adapting their services, communication, and marketing strategies to the local context (Matusitz & Lord, 2013). This outcome is accomplished by a two-pronged approach that 1) fosters residents' support of the organization's presence in their community and 2) increases travelers' loyalty to the organization by offering services that are culturally sensitive (Salazar, 2005). Glocalization strategies for gaining local residents' support include prioritizing the local language and culture within the organization, hiring and training residents to fill leadership positions, and partnering with grassroots non-governmental organizations (NGOs) and community development projects (Lord, 2010). What differentiates this perspective on local support is deeper than a short term or superficial arrangement. Jamal and Getz (1995) explain that while many businesses may engage in cooperation whereby two entities are working together to achieve short-term goals, glocalization has a focus toward collaboration, which implies that both entities are sharing common long-term goals, core values, and ethical standards.

Strategies for enhancing travelers' loyalty include creating the right physical atmosphere, personalizing experiences, and establishing a cultural bridge (Matusitz, 2016; Salazar, 2005, 2006). Glocalization strategies may provide a viable means of shepherding travelers through each stage of the transformative process (Wolf et al., 2017). For example, glocalization strategies include providing detailed explanations of the expected outcomes of an activity (disorienting dilemma and self-reflection stages), creating an atmosphere for meaningful cultural immersion (disorienting dilemma stage), storytelling that is inclusive of the local culture (self-reflection stage), and adapting services to cultural preferences (all stages) (Lord, 2010; Matusitz & Lord, 2013; Simi & Matusitz, 2017). The glocalization framework recognizes that no community operates in a vacuum. For communities and cultures to survive, and perhaps even thrive in a global society and economy, they must balance protecting what is precious and unique about a place and what they can gain from interaction with the rest of the world.

Glocalization is not without its critics. Thornton (2000) makes the highly important argument that glocalization does not take into account locals' resistance to foreign cultural practices. Additionally, Robertson's conceptualization of the local and global as being part of the same constant flow of exchanges fails to address issues of social inequity and power dynamics (Roudometof, 2016). While glocalization aims at embedding elements of the local culture into an organization, it does not address the power issues that come into play in the process. Related questions include, for example, who determines which local elements should be included, what constitutes a locality, and how and which local residents are empowered. Thus, glocalization can be criticized as being idealistic at best and neocolonial at worst in the sense that it implies that organizations are both intrinsically motivated and realistically able to implement glocalization strategies in an ethical and inclusive manner.

If these criticisms are acknowledged and accounted for, glocalization may be able to form a foundation that could theoretically assist transformative tourism practitioners in their creation of transformative tourism experiences. Based on an exhaustive review of the literature on glocalization, we identified 13 key glocalization strategies and consolidated them into a table for ease of review (Table 1). This set of strategies was developed in an inductive manner by classifying all of the strategies mentioned in the reviewed articles, combining strategies into coherent categories, and creating individual definitions congruent with the end goal of each strategy. The strategies were organized according to their orientation toward community acceptance and support, tourists' acceptance and loyalty, or both. For example, diversity advocacy is linked with both gaining residents' support when managers decide to hire employees with different cultural backgrounds (Minei & Matusitz, 2013) and strengthening travelers' loyalty to the organization by weaving elements of the local culture (e.g., symbolic colors and religious customs) into communications (Simi & Matusitz, 2017).

Our purpose is to respond to Walker and Moscardo's (2016) call for an investigation of practitioners, specifically how self-described transformative tourism practitioners engage with tourists and local stakeholders to provide what they perceive as a transformative experience for tourists via the use of glocalization strategies. While we acknowledge the importance of understanding and including the voice of each local culture as well as recognizing the unique traits of particular travelers, this paper focuses squarely on practitioners' perceptions of the equation as they navigate between communities and travelers.

Methodology

Research paradigm

In this study, we adhere to an interpretative paradigm, which recognizes multiple realities of a single social phenomenon shaped by culture, context, and historicity (Bailey, 2007; Golafshani, 2003). As interpretative researchers, we perceive self-reflexivity as crucial to our paradigm (Ponterotto, 2005). We engaged in self-reflexivity throughout the project to consider how our own experiences and beliefs interact with the phenomenon of interest (Marshall & Rossman, 2014). Our collective experiences span many decades of tourism, communication, international development, and environmental research and experience. We do acknowledge, however, the importance of a perspective or framework from which to work. Grounded theory, in its truest sense, does not operate completely unfettered from previous knowledge, and neither does an interpretivist perspective. Following this approach of acknowledging previous theoretical knowledge, we utilize the glocalization framework as a loose starting point for our investigation of transformative tourism.

Table 1
Glocalization objectives and strategies.

Strategy	Sources	Definitions and examples from the literature
Objective: Gain residents' support		
Adapt hiring policies	Matusitz (2010, 2011, 2016); Matusitz and Forrester (2009); Minei and Matusitz (2013)	Adapt the firm's hiring practices to the local work culture, labor, and union policies. Hire residents. (e.g.; instating an official "greeting time" in the morning to respect the local tradition of the employees)
Create leadership programs	Matusitz and Lord (2013); Salazar (2005, 2006)	Develop leadership programs for employees so that they can gain a global perspective and empower them to make decisions based on their understanding of the local culture. (e.g.; an organization offering fully founded a European internship to its Indonesian employees to build skills as tour guides)
Establish community partnerships	Matusitz and Lord (2013); Salazar (2005); Ramutsindela (2004)	Support/partner with local community programs to show genuine interest and become an inherent part of neighborhood life. (e.g.; allowing local managers to select on their own the local community groups that they would like to support with donations from the organization)
Foster cultural understanding	Matusitz (2010); Matusitz and Forrester (2009); Minei and Matusitz (2013)	Work on understanding the cultural and socio-economic context of the community in which the organization is trying to work. (e.g.; an organization hiring local cultural experts to help facilitate its implementation in a new community)
Objective: Gain travelers' loyalty		
Create the right physical atmosphere	Matusitz and Forrester (2009); Matusitz (2010, 2011); Salazar (2005);Thompson and Arsel (2004)	Create an atmosphere in which elements of global and local culture blend in terms of decor, settings, and design. (e.g.; adapt the décor inside a building so that it combines western design with *Feng Shui* principles)
Establish a cultural bridge	Salazar (2006)	Find and communicate cultural connections between the travelers' own culture and the local culture to create a cultural bridge. (e.g.; Tanzanian tour guides making direct comparisons between life in Tanzania and the travelers' own country to emphasize common cultural references)
Manage expectations	Cawley, Gaffey, and Gillmor (2002); Matusitz (2010, 2011); Matusitz and Forrester (2009)	Manage the cultural differences and tastes that influence expectations of price perception, quality, consumer habits, and service encounters. (e.g.; a group of Irish small hotel owners deciding to join forces and promote their unique rural tourism approach to the U.S. market by creating a group that set guidelines and offer advices with regards to the expectations of U.S. visitors)
Create personalize experiences	Matusitz and Forrester (2009); Matusitz (2016); Salazar (2005, 2006)	Adapt programs and encourage product development that weaves elements of the organizational culture with elements of the travelers' cultural background. (e.g.; adapt activities of the guided tours to the travelers' cultural preference with regards to interacting alone or in small group with residents)
Objectives: Gain residents' support and travelers' loyalty		
Encourage diversity advocacy	Matusitz (2011); Matusitz and Lord (2013); Minei and Matusitz (2013)	Support diversity via hiring and staff communications, seek representativeness, and monitor interactions with travelers. (e.g.; value diversity by representing employees from minority groups in empowered situations in communication messages/advertisements)
Use localized discourse	Matusitz (2011); Simi and Matusitz, (2017); Kobayashi (2012); de la Barre and Brouder (2013)	Include elements of the local culture during interactions with travelers, and staff, and marketing efforts. (e.g.; explain the cultural relevance and traditions associated with the local food when marketing/promoting food related experiences as authentic)
Develop storytelling	Matusitz (2010); Salazar (2006)	Market the organization by building a story which highlights how elements of the organization's history are weaved with elements of the local culture in order to design a travel experience that is socially responsible and culturally sensitive. (e.g.; take into account how the residents would like their culture to be, or not to be, depicted and represented)
Enhance staff awareness	Matusitz and Lord (2013)	Value employees for their ability to connect cultures with one another. (e.g.; an organization actively encouraging its employees to proudly wear a tag listing all the foreign languages they can speak so that customers/residents feel like they can easily reach out to them in their native language).
Incorporate symbolism	Matusitz (2010, 2011); Giulianotti and Robertson (2007); Simi and Matusitz (2017)	Include local symbols into products/experiences. (e.g., design a firm's logo based on the color symbolism of the local culture).

Participants

Participants were selected through a combination of purposeful and snowball sampling. To be selected for the study, informants needed to occupy a managerial position (e.g., founder, executive director, or program director) in an organization that self-described itself as a transformative tourism provider. This ensured that the informants had enough knowledge about the organization's

strategies with regard to program design, communication, human resources, and relationships with local communities. We developed a specific set of selection criteria based on the transformative tourism literature and used these criteria to target organizations:

1) Intentional and sustained interaction takes place between travelers and residents.
2) Interactions are designed to be enriching for both participants and residents.
3) Opportunities exist for travelers to engage in self-reflection.
4) Travelers are pushed outside their comfort zones.
5) Skill development and cultural understanding are encouraged.
6) The local natural environment is considered.
7) The organization engages in socially responsible development.

The use of these criteria helped ensure that the selected organizations were indeed engaged in a form of tourism that could be characterized as transformative.

Potential organizations were identified through third parties (i.e., tourism specialists, mentors, and experts), public member rosters of international associations such as the Transformative Tourism Council, the Adventure Travel and Trade Association, and the online search engine GoAbroad.com. The member rosters of these associations were used to identify the names of organizations, their contact information, and their websites. Evidence of the transformative nature of each program was confirmed through an examination of mission statements, values, itineraries, charters, and manifestos on the organizations' websites. All informants were invited to take part in the study via email. Although emails were sent to both English and French speaking organizations, all interviews were conducted in English. To expand the sample, the interviewer asked the informant the following question at the end of each interview: “Do you have recommendations about other organizations to interview?”

Of the 150 invited organizations, representatives of 37 organizations agreed to be interviewed. The low response rate is not unusual with these types of tourism organizations. In this case, the timing of the interview requests likely played a significant role: interviews were conducted during the northern hemisphere summer at the height of the busy season (June–September). Some organizations expressed reticence to participate due to past negative experiences with other research projects. Other factors might have come into play as well, including a lack of prior contact with the research team and the necessary lengthiness of the introductory email to ensure that all ethical components were addressed. With regard to non-respondent, there were no clear patterns in size, organization type (e.g., NGO versus for-profit organizations), number of destinations offered, or headquarters location.

Interviews were conducted via video conference or telephone call. Participating organizations included for-profit organizations (22), for-profit organizations with a foundation (6), non-profit 501c3 organizations (3), and NGOs (8). Types of transformative tourism included in the study are volunteer tourism programs, study abroad, adventure travel, and cultural travel. Table 2 displays descriptive information about the informants and organizations. A total of 37 in-depth interviews were conducted across 34 organizations whose headquarters were located in Argentina (1), Australia (1), Canada (2), Costa Rica (1), Egypt (1), Italy (1), Japan (1), Namibia (1), Nepal (1), New Zealand (1), Panama (1), Tanzania (1), the United Kingdom (4), the United States (18), and Vietnam (1). The participants were assigned aliases, and the names of their organizations were concealed. Recruitment of additional participants halted after data saturation was reached (Marshall & Rossman, 2014).

Data collection and analysis

A qualitative approach was chosen due to the exploratory nature of the topic and the aim of capturing the full complexity of situations practitioners encounter and the breadth of strategies they use. To generate rich data, multiple sources were used for each organization (Maxwell, 2012). An analysis of each website was conducted to identify marketing, communication, leadership, community development and expansion strategies. Additionally, official public documents, such as strategic plans and impact reports were analyzed. The use of public documents and website analyses helped us to develop a deeper understanding of the organizations' backgrounds and understand both how they chose to present themselves to the public and what they expect to look like in the future. These data sources supplemented in-depth interviews which took place either by telephone (n = 20) or video call (n = 17). The use of in-depth phone/video interviews was chosen because that approach allowed us to easily contact informants from across the globe, probe for more information and clarification when needed though additional questioning and gather rich data about the complex phenomenon of interest.

The glocalization literature was used by the interview guide to define broad topics to be addressed such as leadership, program design and implementation, communication and promotional materials, human resources, and interactions with community residents. Questions were then designed to shed light on each of these topics while letting participants freely express additional strategies used in their organization or discount the suggested strategies. For example, informants were asked, “As part of your organization planning process, how have you identified, assessed, and selected the location of your travels/trek/tours? How does your organization maintain a presence at the destination? How do you adapt your leadership and communication strategies to cultural differences?” While glocalization was used as a starting point, informants were given many opportunities and were, in fact, encouraged to go beyond the interview guide and include additional strategies. Open-ended probing was also used for clarification and deeper exploration of practices and viewpoints.

Interviews lasted from 45 to 60 min. In addition to direct transcription, the sole interviewer took notes on the verbal cues of the participants (e.g., tone of voice, speech patterns, and use of humor), which helped in developing thick descriptions and contextualizing the conversations between the participants and interviewer (Bailey, 2007). All interview data exclusively reflect the

Table 2
Descriptive information about informants and organizations.

Alias	Job title	Organization's headquarter location	Organization's status	Types of transformative tourism programs	Established in	Number of program locations (countries)
Aaron	Program director	North America	NGO	Volunteer tourism	1975	4
Abigail	Executive director	North America	NGO	Volunteer tourism	1975	4
Brooke	Executive director and co-founder	Oceania	NGO	Cultural travel	2013	11
Bryan	Sales director/account manager	Europe	For-profit	Adventure travel	1987	33
Caroline	Marketing director/ senior manager	North America	NGO	Volunteer tourism	2007	2
Connor	Executive director	North America	NGO	Adventure travel	1961	45
Daisy	Marketing director/ senior manager	North America	Non-profit	Volunteer tourism	1985	10
Daniel	Executive director	South America	For-profit	Volunteer tourism	2005	1
Emma	Co-founder	Oceania	NGO	Cultural travel	2013	11
Ethan	Program director	North America	For-profit + foundation	Adventure travel	1985	39
Fabian	Founder	Europe	For-profit + foundation	Adventure travel	1991	12
Fiona	Founder	Africa	For-profit + foundation	Adventure travel	2008	1
Gabriella	Marketing director/ senior manager	Asia	For-profit	Cultural travel	2005	1
Greyson	Director of partnerships	North America	For-profit	Adventure travel	2008	40
Haiden	Expedition leader	North America	For-profit	Study abroad + volunteer tourism	1997	24
Hailey	Executive director	North America	For-profit + Foundation	Cultural travel	1978	60
Irvin	Founder	Asia	For-profit + Foundation	Adventure travel	1999	1
Isabella	Founder	North America	For-profit	Cultural travel	2005	2
Jasper	Founder	North America	NGO	Volunteer tourism	2006	2
Jennifer	Founder	Oceania	For-profit	Study abroad	2008	1
Kayla	Expedition leader	Europe	For-profit	Adventure travel	1987	33
Kenneth	Program director	North America	For-profit	Adventure travel	2006	9
Lillian	Program manager	North America	For-profit	Study abroad + volunteer tourism	1997	8
Luke	Founder	South America	For-profit	Adventure travel	2008	1
Madeline	Founder	South America	For-profit	Cultural travel	1999	1
Matthew	Founder	North America	Non-profit	Adventure travel	2007	3
Nathan	Founder	North America	For-profit	Adventure travel	1990	7
Nicole	Program director	North America	NGO	Volunteer tourism	1986	6
Olivia	Founder	North America	For-profit	Cultural travel	2015	4
Oscar	General manager	Asia	For-profit	Cultural travel	1974	1
Paige	Founder	North America	For-profit	Cultural travel	2015	4
Peter	Communication manager	Africa	For-profit + foundation	Adventure travel	1998	1
Quinn	Founder	Africa	For-profit	Cultural travel	2005	1
Quintin	Founder	North America	For-profit	Adventure travel	1986	3
Rachel	Program manager	North America	Non-profit	Study abroad + volunteer tourism	2000	5
Ryan	Founder	North America	For-profit	Adventure travel	1987	25
Sophia	Co-owner	Europe	For-profit	Adventure travel	1972	18
Steven	Founder	Europe	For-profit	Adventure travel	1981	40
Stacey	Senior operations manager	Europe	For-profit	Adventure travel	1981	40

perspectives of the practitioners, rather than objective measures of actual program implementation. The lead researcher memoed throughout to record reflections on the conceptualization of the phenomenon, methodological choices, the interview process, data analysis, and the writing phases (Bailey, 2007). Memos were kept in a research log and regularly updated throughout the process.

Prior to the data analysis, the detailed transcript was sent via email to the participants for member checking (Creswell, 2015). In the single case in which substantial changes were requested by a participant, a memo was created to note those differences, and both transcript versions were saved. The raw data were analyzed via conventional coding (Creswell, 2015). During the open coding phase, a broad range of codes was initially identified (Marshall & Rossman, 2014). Next, 13 key glocalization strategies gleaned from the literature (Table 1) were used merely as an inspiration to further organize those codes into a scheme during the open code phase. Care was taken to ensure that the strategies were simply a broad guide and that no effort was made to "force" a code where none existed. For example, if informants mentioned that the first step of any program development process was for them to hold a meeting and/or develop partnerships with local businesses, these actions were assigned the open codes of "community" and "interactions" before being assigned to the strategy of "establishing community partnerships". Although the 13 glocalization strategies were used during the initial organization of the codes, we intentionally allowed for additional strategies to emerge and expand beyond their limitations. If no evidence of the strategy presented itself, that strategy was dropped from the coding scheme. During the axial coding

phase, strategies were refined into three main objectives sought by practitioners, and supporting quotes were identified and woven into the storytelling (Bailey, 2007; Marshall & Rossman, 2014).

Building on the concepts developed by Lincoln and Guba (1985) and recommended by DeCrop (2004) as a way to escape the limitations of the traditionally positivist criteria of generalizability, validity, and reliability, we assessed the trustworthiness of the data through four criteria: credibility, transferability, dependability, and confirmability. Credibility was enhanced via the collection of data from different sources (i.e., in-depth interviews, website analyses, strategic plans/impact reports) and the use of member checks. Transferability was reinforced via the use of thick descriptions and a broad sample. Dependability was strengthened by the fact that each author examined the data separately. All codes and memos were originally generated by the first author and then reviewed by the second author. All three authors discussed relevant meanings and possible re-conceptualizations at length. Confirmability was also reinforced through member checks, memoing, and reflexivity regarding topics such as the interview process, data coding, interpretations, and the researchers' past experiences. To ensure confirmability, memoing was used during the interview process and the coding stage as part of an audit trail (Creswell, 2015). During each interview, observations and insights focusing on the setting (e.g., distracting noises on the telephone line) and content (e.g., "Was the probe effective?") were recorded. The objective was to use these memos as markers of how the interviews had been conducted and had evolved so that if the interview guide and transcripts were to be audited by a third party, this external auditor would be able to understand why changes took place and if those changes could have impacted the results. Memoing was also employed to keep track of the evolution of code names and the emerging ties between codes, note questions raised by the coding, record possible holes in the analysis, possible links with theories and concepts, difficulties encountered, and disconfirming evidence. Additionally, memoing was used to provide a detailed map of how the codes emerged from the data for potential external auditors.

As always, there are methodological limitations. Given the interpretivist approach, we recognize the reflexivity of both the interviewer and the analyzers of the data as a potential limitation. The purposive sample, while diverse and globally oriented, is limited to representatives of English and French-speaking organizations and cannot be considered representative of all such practitioners.

Findings

The research objective is to investigate how self-described transformative tourism practitioners engage with tourists and local stakeholders to provide what they perceive as a transformative experience for tourists via the use of glocalization strategies. Data collected from the informants suggest a modified and expanded glocalization framework from the foundations presented in Table 1 when applied to transformative tourism. We refined and expanded the glocalization framework, building on the two objectives and 13 strategies outlined in Table 1 to develop a new framework of three objectives and 16 strategies (Fig. 1). The three objectives include: (1) establish legitimacy in the local community, (2) break down cultural barriers within the organization, and (3) stage transformative encounters. The three additional key strategies are: favoring collaboration over competition, acknowledging employees as agents of change, and implementing post-trip contact and facilitation (see highlighted items in Fig. 1). The transformative

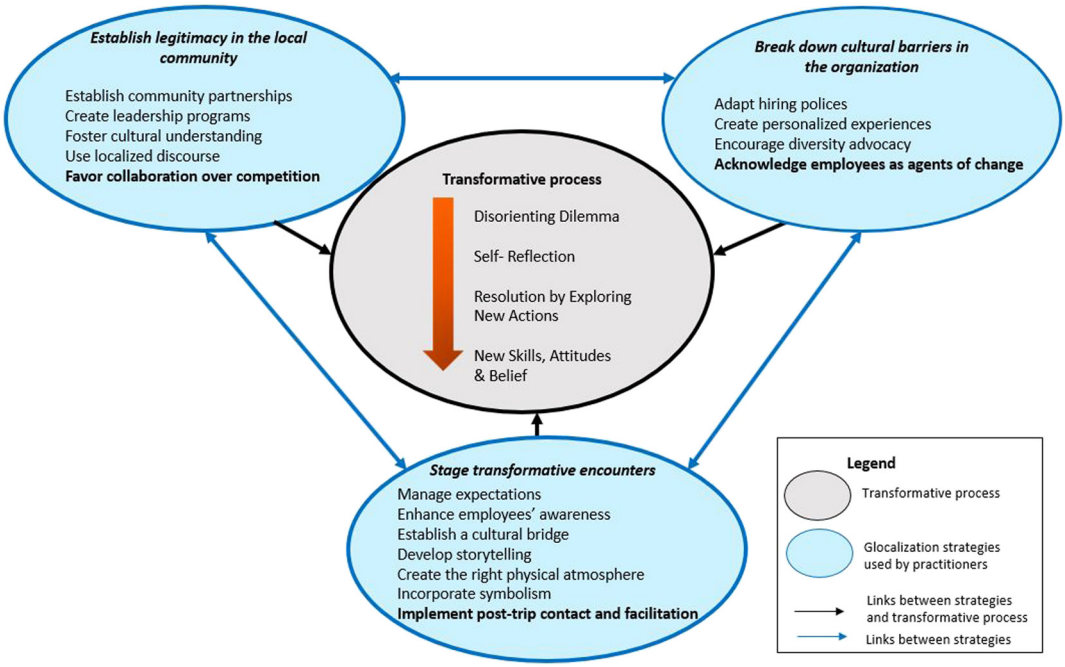

Fig. 1. Glocalization framework for transformative tourism.

process is depicted at the heart of the framework, as it is informed by the practitioners' perceptions of glocalization strategies.

Establish legitimacy in the local community

The organizations studied employ an array of glocalization strategies they believe help them to establish legitimacy with local host communities and facilitate the implementation of transformative tourism programs. Dowling and Pfeffer (1975) refer to *organizational legitimacy* "as the congruence between the values associated with the organization and the values of its environment" (p.122). We suggest that transformative practitioners are first concerned with establishing legitimacy in the community because they understand that the success of their programs rely on their abilities to create deep, authentic connections between travelers and residents (DeCrop et al., 2018). Through meaningful encounters, practitioners can introduce travelers to different worldviews and encourage them to self-reflect on cultural differences. The importance that informants placed on gaining legitimacy directly supports the work of Walker and Moscardo (2016) who suggest that the travelers' transformative experiences are improved when they perceive that the residents actively support them and take part in the experiential activities offered by tour operators. Informants reported the following legitimacy related glocalization strategies: establishing community partnerships, creating leadership programs, fostering cultural understanding, and using localized discourse (Fig. 1). Additionally, a new glocalization strategy of favoring collaboration over competition emerged from the analysis.

In keeping with the work of Simi and Matusitz (2017), the informants reported being eager to develop legitimacy in the eyes of both the community and tourists through successful community partnerships. For example, Simi and Matusitz (2017) describe how organizations can earn legitimacy by partnering with well-respected local NGOs. The informants' organizations not only partner with local programs, but also use those programs as an opportunity to facilitate transformative encounters between travelers and residents engaged in the programs. When talking about his volunteer tourism partnership involving protecting turtle nests in Costa Rica, one informant explained:

> *It has a pretty strong local engagement component where the people that are actually out on the beach with students are former poachers that used to steal eggs and are now employed by this organization as guides. I have made sure that we always partner with organizations that are working with a community-based approach to conservation…. These kids get to see that these people are not just evil poachers but regular people that were just trying to make a living.*
>
> *Haiden, For-profit, North America*

Community involvement sometimes leads to a decision *not* to create a transformative tourism program, a phenomenon rarely acknowledged in the literature. For example, Quintin decided to pull his program from a local community, because he did not want to complicate or hinder existing local community development initiatives:

> *There were local companies that could do as good, if not a better job, than us in some cases. We surrendered the business to them…. I'm proud of that decision.*
>
> *Quintin, For-profit, North America*

Several informants perceived transformative learning *within* their organizations as an inherent social need. This finding is in line with previous observations by Matusitz and Lord (2013), who suggest that glocalization strategies can only succeed when organizations are able to recognize the pool of talent among their employees, and by Salazar (2005), who describes the importance of providing quality and personalized training. Informants echoed those findings and further stressed the importance of capacity building to permit local residents to access top leadership positions in the organization. Creating leadership programs for local residents reinforces the social license of the organization and helps it to gain support in the community. In one organization, a separate local group was even created with the deliberate goal of eventually taking over the project, a radical approach not previously noted in the tourism literature:

> *It's important to note that one of the aims of opening up an operation in Tanzania was to entirely remove [our organization] from the picture. [The local group] would effectively micro manage the whole project, using all that they had learnt from years of working with us in their own country.*
>
> *2017 Annual Report, For-profit and foundation, Europe*

Informants reported many examples of developing legitimacy strategies that could be categorized under the glocalization building block of fostering cultural understanding, supporting the previous work of Matusitz (2011) and Minei and Matusitz (2013) who explain that an organization is an inherent part of the local political and social ecosystem. Informants were acutely aware that the first step to earn trust in the community was to ensure a consensus on the organization's presence and to acknowledge and respect the social structures put in place by community residents.

> *We really look to the local partners to determine how travelers can best fit into what's already happening. We look to the local part to see how we can fit in to what's happening there on the ground than the other way around of us saying that we have these volunteers or travelers that want to do this, can you make a program around that?*
>
> *Matthew, Non-Profit, North America*

In line with the work by Simi and Matusitz (2017), several informants stressed adapting their discourse to the local context to ensure that their roles and activities were well-perceived by the community. Simi and Matusitz (2017) explained that community acceptance is based on an organization's ability to include references to important cultural symbols in its communication. The

importance of mastering local communication codes was witnessed by Caroline, an administrator at a non-profit organization in North America, during the launch of a new school-focused volunteer tourism child sponsorship program in Zambia. She explained that in Zambia, the word "sponsor" implies involvement throughout the life of a child and her realization that her organization should utilize the term in a manner consistent with the local culture.

> *Families, guardians of the children were coming to the school and expecting, "Oh my child is sponsored, where's the money for that and I'm expecting the financial benefit," when it was really they were getting sponsored so that we could support their education at the school. It had some negative connotations locally and for our partner…and we also feel like it sort of perpetuates more [of a] white savior power dynamic that we're not at all about.*
>
> *Caroline, NGO, North America*

In another example of conflicting socio-cultural codes, Paige suspected that a male translator was creating a barrier and not fully facilitating a discussion on women's empowerment. This experience encouraged the informant to further reflect on issues of gender inequality and led her to decide to only converse with women through female translators. After this decision, she reported a more comfortable atmosphere with all women feeling more at ease to discuss women's empowerment and entrepreneurship.

> *There have been times that we try to talk to communities, and we've had to talk through a male translator to a female and that can be very difficult. I don't actually know if they're telling our question correctly, but I also feel that sometimes, the local female does not feel comfortable speaking her mind. For me, if we can get the male out of there and get a female, I do feel they would be more willing to communicate… I have to learn to communicate without language and assess situations without that.*
>
> *Paige, For-profit, North America*

Favoring collaboration over competition emerged as an additional glocalization strategy not previously reported in the glocalization literature. Several informants mentioned that they actively work with competitors to pursue higher order transformative tourism goals, such as encouraging environmentally friendly tourism activities, reducing pollution (e.g., plastic bottle use), and enforcing socially responsible hiring practices. These practices help to reinforce the legitimacy of an organization within the community. By partnering with competitors, the informants were able to reinforce the message that they care more about the well-being of the local community than about profits alone.

> *What we've said from the beginning is we don't want to say competitive, which is very anti-business… we want to say collaborators. So, if we come across an organization or a company doing something similar to us, rather than be like, "Oh no, they're copying us," we get excited. That's actually a really positive thing because it means the more people that are thinking about these kinds of issues and the more organizations that are working towards the same thing as us.*
>
> *Brooke, NGO, Oceania*

Break down cultural barriers within the organization

Informants reported several previously identified glocalization strategies they perceived as helpful in breaking down cultural barriers within the organization: adapting hiring policies, creating personalized experiences, and encouraging diversity advocacy. Additionally, a new strategy emerged: acknowledging employees as agents of change.

In keeping with the work of Matusitz (2010, 2016), informants frequently referred to how they had adapted their organizations' hiring practices to the local work culture and treated local employees as extremely valuable cultural brokers to help their organization navigate the global/local interface. Informants also actively encouraged the empowerment of minorities through hiring practices. For example, as the first female Costa Rican manager hired by her organization, Rachel exemplified how hiring policies had evolved in her organization to reflect the need for local leadership. As mentioned in the impact report of one organization, and in keeping with the work of Matusitz (2011), a diverse team supports novel insights and creative inputs that can improve program design and transformative outcomes. Further, hiring a diverse team can make travelers feel more welcomed because the organization is perceived as inclusive.

> *We are based in [an area] home to a largely indigenous population, which we want to honor in our employment practices. When the composition of our team is diverse, we can provide a greater breadth and depth of experiences and perspectives.*
>
> *2016 Sustainability Report, For Profit, North America*

To create personalized experiences for tourists, informants often used their abilities to adapt programs and encourage program development by weaving elements of the local culture with elements of the travelers' cultural background. Although the programs were personalized to the traveler's tastes, the organizations were eager to maintain the integrity and authenticity of the local culture. This concerns for including the local culture is also present in Salazar's (2006) views about the importance of including local languages and customs in tourism programs in order to avoid neocolonialism discourses. For example, Jennifer described how each of her study abroad programs incorporate cultural elements related to the high school students' interest in fishing:

> *We feel that it's really important for every trip to have at least one activity that involves indigenous people. We do different things depending on the interest of the group… Sometimes [the students] go out with two brothers and learn how to throw a spear, and how to catch their own food that way. It is actually these men saying, "This is what our people have done for thousands of years. This is just how we catch our food. It's not just for sport".*

Jennifer, For-profit, Oceania

A previously unrecognized glocalization strategy also emerged within this category: acknowledging employees' efforts as agents of change. Travelers usually experience transformative changes after they return home, and this timeline leaves the guides wondering whether their interactions with the travelers were indeed effective in triggering changes, as they are not able to witness post-trip transformations. Several informants mentioned that it is crucial for employers to acknowledge this, so subsequently guides can recognize themselves as change agents. Sharing positive post-trip testimonies and letters from visitors serves as one strategy to enhance employees' awareness.

I go, "Stop! Love letter time!" and then I read these letters that the clients write to the guides, [and we] get this email saying, "You are the best guide ever! You have changed our view on Africa." I read out these emails to the team because sometimes they forget what they do.

Fiona, For-profit, Africa

This finding suggests the value of sharing post-experience evaluations with tour guides. In addition to acknowledging the work of employees and boosting their morale, tracking the transformative impacts of a program is especially important for NGOs and not-for profit organizations as a means to show those outcomes with donors and board members.

Transformative tourism guides are the eyes and ears of the organization, witnessing factors that help or hinder the transformative process and ultimately working to improve it. Open communication among employees across all levels is crucial. Because of this, informants stressed that it is important to foster diversity advocacy among employees and be sensitive to power differentials. For instance, some organizations have adapted their internal communication to facilitate inclusion of local employees.

We have a little camp on the banks of the Trishuli River. We've just had everybody there for a few days for a get-together. We try to remove the usual hierarchical values that will exist to encourage what I would call a more cooperative role of operating the business.

Irvin, For-profit and foundation, Asia

By creating a space for meaningful interactions, Irvin makes his employees feel valued and encourages them to offer suggestions or criticism in a constructive manner. While this approach will not completely eradicate the often deeply entrenched power structures within and across residents, tourists, and transformative tourism organizations, some organizations are at least acknowledging and attempting to address potentially unhealthy power structures.

Stage transformative encounters

A final set of glocalization strategies focuses on staging transformative encounters. These strategies include managing expectations, increasing employees' awareness, establishing a cultural bridge, developing storytelling, creating the right physical atmosphere, and incorporating symbolism. A newly discovered strategy of implementing post-trip contact and facilitation also emerged from the interviews.

Many informants discussed the importance of structuring discussion and reflection time ahead of the disorienting dilemma. This approach is in alignment with Knollenberg et al. (2014), who found that travelers differ with regard to the degree of transformation they expect from participating in volunteer tourism programs. Informants explained that managing transformative expectations is a delicate task requiring skill and expertise. This process entails acknowledging the socio-cultural differences (and often power differentials) between the local community and the tourists without valuing one over the other. One for-profit with a foundation in Asia begins this discussion on the organization's website, ahead of the trip.

We all have to remove the rose-tinted spectacles and confront some of the realities involved. We would respectfully suggest that you need to take two essential things with you: a sense of adventure and a sense of humor.

Guides purposefully introduce sensitive topics, such as cultural differences, power inequity, and natural and social issues at the destination early in the experience. This finding parallels the work of Salazar (2006), who reports that guides trained on glocalization strategies do not shy away from topics such as poverty and female genital mutilation. Peter, a representative of a for-profit organization in Africa, explained that the best employees are those who waste no time introducing these issues. Informants also expressed the importance of reassuring travelers. For example, Daisy mentioned that she discusses the disorienting dilemma as a normal process.

I think a lot of people think that culture shock means that they're not good at traveling or there's some sort of stigma about it. We really want to demystify that. We want them to know that culture shock is actually, in a lot of ways, a really good thing. It means that you're pushing yourself outside of your comfort zone.

Daisy, Non-profit, North America

Informants frequently mentioned the glocalization strategy of increasing employees' awareness of their role in making travelers comfortable, an approach that has been stressed by Salazar (2005) and Wijeratne, Van Dijk, Kirk-Brown, and Frost (2014). Adapting the guides' discourse to the interest and comprehensive knowledge of travelers (Salazar, 2005; Wijeratne et al., 2014) is especially important in transformative tourism, where the exchange is intangible and consumption occurs at the point of production. Transformative tour operators adapt their program based on a deep knowledge of the linguistic abilities, cultural knowledge, and self-confidence of the travelers. For example, Fiona related how she used a traumatic event as an opportunity to explain to travelers the difficulty and complexity of environmental work.

Catching a giraffe is very difficult. When you dart them, they actually run away…one giraffe got into such a panic; he ran into a mountain and broke his neck. Real conservation is not pretty…we had to talk a lot with the guests because they were shaken up…When this giraffe died, we were like, 'Oh, my goodness! These people are going to think we're hooligans, amateurs!' You know, 'I just paid 2,000 bucks to see a giraffe die on a research study!' But luckily, these were guests that understood the bigger picture, as we had prepared them.

Fiona, For-profit, Africa

Employees' awareness can also play a role in bridging intercultural disorienting dilemmas between travelers and residents. Informants reported bringing in partners who are knowledgeable regarding both the local culture and the travelers' culture to explain and discuss sensitive issues. For example, after witnessing abject poverty for the first time, travelers commonly react by promising to buy objects to send to residents. Brooke's response to this reaction is both clever and respectful of the local community:

In Peru, we had a lovely woman on our trip who saw that the children were walking to school in their shoes made out of old tires… Our traveler wanted to buy all the kids trainers… They needed so many other things before they needed shoes… That's where we brought in our local partner at the non-profit to explain, 'no, these are what's actually needed and what's urgent.' I think that, again, is the best way to do it rather than me trying to explain it and seeming mean, like I don't want to get the kids shoes.

Brooke, NGO, Oceania

This discussion raises the question of whether visitors can adequately make connections between their privilege at home and the poverty they may witness. Doing so may be difficult for even the most politically sensitive tourists. Although Salazar (2006) emphasizes the importance of guides establishing a cultural bridge and making direct comparisons between their home country and the home countries of the travelers, informants suggested that those comparisons are complicated by the sometimes prejudicial comments contained in mainstream Western discourse. For example, Quinn shared that she coaches her employees to constantly update their knowledge of the travelers' culture to understand how the host country might be misrepresented in the travelers' minds:

We make sure that we tell our guides, "You need to be updated with all types of media around you." Because, for example, at sometimes, Egypt was not on the best terms with the American government and at other times, with the British government. Of course, the media would then be sharing different pieces of news. That means the British travelers will have a story different from the American travelers, different from the Egyptian guides.

Quinn, For-profit, Africa

Developing storytelling is another strategy that the informants used to trigger self-reflection in travelers and is an approach recognized in both the glocalization (Matusitz, 2010; Salazar, 2006) and transformative tourism (Frost, 2010; McWha, Frost, & Laing, 2018) literature as being crucial to cross-cultural encounters. Informants explained that they purposefully and carefully incorporate storytelling as a powerful way to introduce new meaning schemes to the travelers. For example, Quintin introduces travelers to trappers who live in a remote area near the Arctic Circle and explain that traditional, sustainable hunting is the only way to provide food for one's family. Quintin mentioned that the travelers experience a change of opinion after listening to the trappers tell their own life stories:

At the beginning of these presentations, we'd have guests at the back of the room with their arms crossed and back straight and just not engaged because how dare we take them to a fur presentation. By the end of the conversation, Jack and Ava would hug with our guests. The same guests that were standoffish at the beginning would have tears streaming down their cheeks and they'd be hugging Betty; they'd be exchanging their addresses and becoming pen pals.

Quintin, For-profit, North America

Virtually all informants utilize the glocalization design strategy of creating the right physical atmosphere which is conducive to cultural interactions, providing strong support for the work of Thompson and Arsel (2004), who detail the importance of creating a "third space" where both the local and global culture can safely co-exist. While Thompson and Arsel (2004) focus solely on the guests, the informants described selecting spaces that put not only the travelers but also the residents at ease. Such physical environments encourage travelers and residents to interact with one another and break the initial awkwardness of the first encounter, permitting people from highly different backgrounds and cultures to learn from one another. For example, Matthew explained how physical space, such as the ocean, can foster powerful interactions between travelers and hosts.

It's really a powerful…you're in the ocean, you're interacting with others, you're interacting with the natural environment.

Matthew, Non-profit, South America

Many informants explained how they incorporate symbolism through games to facilitate discussions on sensitive topics, introducing an entertaining and enjoyable element into the mix. This approach is in keeping with the work of Giulianotti and Robertson (2007), who suggest that symbols play a substantial role in how individuals negotiate and interpret their meaning schemes. Kenneth provided one example of a games approach:

We break them out into three different groups. They are given instructions to build their ideal community space with the materials that they're given. What they don't realize is they all got different materials and in different quantities…The group with very little materials often becomes frustrated. We also interact throughout the game and reinforce that frustration through follow-up instructions. Through this game, we're able to talk about forms of structural oppression or power within the teams…If you personalize power and personalize privilege, people often become very defensive, and it's very difficult to digest and to tackle and confront. The idea through the games is to actually

depersonalize it, bring it into a shared safe space, and then talk about the implications that it has for the communities that we're visiting and ourselves as visitors.

Kenneth, For-profit, North America

Although transformative tourism experiences could certainly happen without structured programs (Kirillova et al., 2017b), most informants perceive that they facilitated the transformative process of the travelers through specific activities. Kenneth was adamant about the use of exercises to defuse difficult discussions about power and privilege. By using symbolic representations to de-personalize the context, facilitators can help groups to see the intersection of structural and individual forces at work.

In addition to the importance for employees highlighted in section 5.2, the post-trip self-reflection component, often referred to as "meaning-making", has also been acknowledged as a necessary component of transformation for the tourist (Reisinger, 2013). Examples of post-trip strategies utilized by transformative tourism organizations include access to trip organizers by text, telephone call, and/or e-mail; heavy reliance on social media (e.g.; special Facebook pages/groups), Skype conversations; activities journals; and end-of-service reunions.

I also personally give them my cell phone, so that they can have access to me…they can send me a text message or call me. So we just try to really show that we're there for them.

Nathan, For-profit, North America

Definitely with social media it's [the post-trip reflection] so much easier if they want to Skype their guides or a staff member at the hotel that someone loved, and they want to stay in touch…We also just installed our first round of activities journals…there are questions that we're giving them to think about.

Emma, Non-profit, Oceania

This additional strategy of post-trip contact and facilitation of any further disorienting dilemmas the tourist might experience upon return home is a unique approach not previously recognized in the glocalization literature but well-documented in the transformative tourism literature (DeCrop et al., 2018). This approach has also been found to be important in similar fields such as environmental education (Stern, Powell, & Hill, 2014). The advent of information technology has facilitated numerous ways in which tourists and transformative tourism practitioners can maintain contact, thereby extending (and hopefully deepening) this phase of the transformative process.

Conclusion

Our study reveals one key finding and three sub-findings. The key finding is that our research exposes a unique glocalization framework of strategies used by transformative tourism practitioners (Fig. 1). Across the 37 organizations in the study, many examples of glocalization strategies emerge, providing solid evidence that the glocalization framework is useful for transformative tourism organizations. Examples exist at every stage of the transformative tourism experience, from the disorienting dilemma to the development of new skills, attitudes, and beliefs, and include all stakeholders. This finding broadens our perception of transformation as extending beyond travelers alone. In other words, transformative tourism practitioners perceive transformation via glocalization as also including an organization's management of its employees and partnerships with the community.

In addition to confirming that existing glocalization strategies are used by transformative tourism practitioners, our study suggests the emergence of three sub findings in the form of additional strategies as part of the framework. As Fig. 1 highlights, each new strategy is located within a specific objective: favoring collaboration over competition (community legitimacy), acknowledging employees as agents of change (cultural barriers), and implementing post-trip contact and facilitation (stage encounters). Favoring collaboration over competition reflects the work of Jamal and Getz (1995) who suggest that collaborations require a deeper level of engagement from organizations than cooperation and is an even starker contrast to competition. Support for this sentiment is illustrated in our study through Brooke's statement that her organization's role is to develop an overall strategy that includes long-term projects based on common values. This newly discovered glocalization strategy also builds on the work of Cockburn-Wootten, McIntosh, Smith, and Jefferies (2018) who suggest the importance of reaching across communication channels to develop sustainable and inclusive forms of tourism collaboration. Establishing successful collaborations is especially important for those informants eager to minimize the effects of neocolonialism. This interplay between neocolonialism and collaboration was, for example, visible when Caroline realized that the word "sponsors" could be construed as neocolonialist. Her organization swiftly implemented solutions to rectify the situation and removed any confusion regarding the organization's long-term goals and ethical standards shared with local collaborators.

The next newly discovered glocalization strategy pertains to the need for employees to be acknowledged as agents of change. Employees are not able to witness the changes they have helped facilitate in travelers' lifestyles, attitudes, and behaviors after the trip is over and the visitors have returned home. Our study builds on the work of Walker and Weiler (2017) by suggesting that increasing employees' awareness of the transformative process after the fact can spur them in their roles. Similar to Magee and Gilmore (2015), we also found that employees become empowered by the knowledge that they can deliver transformative experiences to travelers. Our findings further suggest that raising employee's awareness that they are agents of change also plays a role in encouraging them to discuss sensitive subjects, pinpoint where travelers are currently situated in the transformative process and implement activities that foster self-reflection. Fiona's reference to reading "love letters" from travelers written after they return home is an excellent example of efforts to encourage agency among employees.

Closely related to the previous strategy, the final new glocalization strategy focuses on the *post facto* transformation of the

traveler: the importance of the implementation of post-trip contact and facilitation. This newly discovered strategy builds on the work of Kirillova et al. (2017b) who suggest that many travelers only start to digest a disorienting dilemma after they return home, often associated with reverse culture shock. Since successful negotiation of the disorienting dilemma is crucial for the travelers to move further into the transformative process (Mezirow, 1991), practitioners must find ways to help travelers overcome their disorienting dilemma when they are not physically present with them. This study complements existing research by sharing the practitioners' perspective on the importance of tracking the presence and evolution of transformative outcomes over a lengthy period. The criticality of doing so is illustrated by the way practitioners develop and deploy an array of solutions (e.g., reflective journals, online group discussions, and video chat) to accompany travelers through the emotional ups and downs that can occur after their return home.

Our study faces some theoretical limitations. A black-and-white framework in a world filled with gray areas is limiting and oversimplifies reality. Distinct lines between glocalization strategies may be hard to detect empirically, as actual practices often overlap conceptually. Similarly, this study assumes a certain level of control on the part of the transformative tourism organizations over transformative outcomes, when the actual level of control is in fact dependent on numerous individual, political, and structural forces. Additionally, the concept of community is treated as a homogeneous construct. A community is a socially constructed concept and inevitably includes individuals with a broad spectrum of worldviews, expectations, and concerns. The aim is not to adopt a reductionist approach but rather to define community in terms of geography, neighborhood, and locality to discuss the local/global interface. An opportunity thus exists to expand on this work to address the different social constructions of community and their implications with regard to glocalization.

As a further criticism, the authors recognize that the glocalization framework has several shortcomings. It assumes that the blend of local and global is both inevitable and beneficial, whereas research findings in this area are inconclusive. Glocalization stresses finding a balance between global and local forces but does not necessarily include ways to give residents opportunities to obtain an ownership stake in the venture or to share the profits; it likewise does not systematically ensure equity in the distribution of benefits. This shortcoming could potentially be remedied by the conceptual application of innovations such as the alternative economy, hopeful tourism, the sharing economy, social justice, and/or fair trade. Additionally, the glocalization framework does not directly assess the *quality* of interactions between travelers and residents, even though it provides broad categories from which one might consider related concerns. Moreover, the framework, on its own, doesn't address diversity within the community.

Broad opportunities exist for future research in this area. Echoing the recommendation of Knollenberg et al. (2014), this study suggests that it is time to develop a transformative tourism outcomes measurement scale. Such a scale would allow practitioners to more accurately measure the nature and extent of transformation among travelers across diverse contexts. Additionally, a scale would enable the study of the relative influence of the factors identified by our research (and others) on transformative outcomes (Stern & Powell, 2013). Of course, this recommendation is based on the assumptions that transformation is indeed consistently desirable and that one can measure experience and transformation. Although experiences in a setting such as tourism are complex, developing such a scale would be useful for tourism organizations, particularly NGOs, that need empirical measures for evaluating the success of their transformative tourism programs, have numbers to complement their transformative stories, and allow them to develop strong grant applications by highlighting the impact of their programs in quantitative terms over time and or testing the glocalization framework under a variety of contexts. In addition to a scale, other innovative research methods (including experimental designs, comparative studies, photo-elicitation, ethnography, and longitudinal studies) to test the glocalization framework could work together to reveal fascinating and valuable findings. Finally, qualitative methodology based on critical and feminist inquiries can also offer opportunities to explore more in depth transformative outcomes related to empowerment, advocacy, and meaning making.

In terms of managerial implications, the examination of the intersection of glocalization and transformative tourism within our study reveals ways to bring out the best of both phenomenon, which is valorize local culture, offer memorable experiences to visitors, foster tourism entrepreneurship, develop sustainable forms of indigenous tourism, and position peripheral destinations in a global marketplace. Specifically, the tangible examples of glocalization described by tourism practitioners provide tools that can uphold a transformative tourism organization's standard of social and ecological responsibility, contribute to a positive work culture, empower and retain highly knowledgeable employees, and provide social equity for both employees and residents. In an era in which tourism is at a crucial crossroads regarding its viability and sustainability, the further application and exploration of glocalization strategies holds great promise for a broad spectrum of tourism experiences.

Declaration of interest statement

The authors have no competing interests to declare with regards to both financial interest and or non-financial interest in the subject matter or materials discussed in this manuscript.

Acknowledgments

The authors would like to thank the informants who generously shared their time, enthusiasm, experiences and insights.

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