An Investigation of Transformative Tourism Outcomes and Strategies

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ACADEMIC ABSTRACT

Transformative tourism is investigated as a potential solution to the challenges currently facing the tourism industry. Tourism is facing a defining time as societies are attempting to manage the effect of fast path globalization and are confronted with the pressing issues of climate change that push us to implement fast and drastic changes in the way that we consume services and interact with others. Transformative tourism proposes to design travel experiences in which travelers are encouraged to self-reflect, become more tolerant of cultural differences, and are eager to become agents of change in their community by fostering social empowerment and taking concrete actions to promote a sustainable way of life. The dissertation takes on a three-manuscript approach, each investigating a facet of transformative tourism in terms of outcomes and strategies. The first article is based on in-depth interviews with tourism practitioners and investigate their use of glocalization strategies as a way to create partnerships with local community members and foster loyalty from travelers. The second article examines the development of a scale to measure the transformative process in travelers. The third article uses a multi-method approach to study the symbols and narratives present in the transformative travelers' experience with the objective of using those to develop marketing content.

GENERAL AUDIENCE ABSTRACT

The dissertation focuses on transformative tourism which encourages travelers to become more tolerant of other cultures. Travelers' transformation occurs through the design of activities that push the travelers out of their comfort zone (e.g.; home stay, visit place where tragedy has occurred), encourage self-reflection and meaningful interactions between travelers and residents (e.g.; mediation, theatre, or art based activities). The dissertation is divided into three studies. The first study investigates how tour operators can design successful activities in their tour to foster transformation. The second one examines the creation of scale to measure the degree of transformation in travelers. The last study aims at understanding the symbols and images present in the transformative travelers' narrative.

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Dedication

To Marie, Gilles, Anne, Lucie, and Rose

INTRODUCTION

The dissertation is based on three articles/manuscripts that are presented in the form of chapters. The topics of these three articles have emerged after a thorough review of the transformative literature. Three gaps that need to be addressed are identified via this review of the literature. The identified gaps and the research questions they are triggering are further discussed below.

One of the topics that emerge is that transformative tourism offers solutions to the pressing challenges that society is facing today (Smith, 2017). The threats of global warming, the rise of neo-fascism, and socio-cultural tensions created by fast-path globalization require our societies to foster behavioral and attitudinal changes (Smith, 2017). Transformative tourism is designed to push the travelers to self-reflect on their assumptions, become more tolerant of other cultures, and foster awareness of the ecological and social impact of the way we consume services (Robert Saunders, Weiler, & Laing, 2017). The most promising tenet of the transformative theory is that travelers become agents of change, advocating for social empowerment and environmental protection and implementing those changes in their community (Smith, 2017). In other words, transformative tourism creates a chain of reactions where travelers are more conscious individuals who actively encourage others to follow their paths.

While the objectives of transformative tourism are well established in the literature, questions remain concerning how tourism practitioners can concretely design activities that facilitate transformation (Saunders, Weiler, & Laing, 2016; Walker & Moscardo, 2016). Walker and Moscardo (2016) recognize that transformative strategies can be difficult to implement for practitioners because transformation is based on individual characteristics (e.g., past experiences and personality types). This is where glocalization comes into play with its set of strategies that are designed to gain the support of destination residents to create meaningful encounters and

positive learning rapports with travelers (Matusitz, 2011; Salazar, 2005). Transformative tourism practitioners need to be able to explain the local context to international travelers and relate it to global issues such as climate change or embracing cultural diversity (Wolf et al., 2017). In their interview with transformative tourism practitioners, Magee and Gilmore (2015) found that "it is more important than ever to have well-trained guides who can tailor the message to suit people with different backgrounds and levels of knowledge about the site and its associated history" (p.911). The advantage of the glocalization is that it takes into account this global/local interface and can provide interesting insights into how practitioners could facilitate the travelers' transformative experience.

The facilitation of transformative experience equally relies on the transformative tourism practitioners' ability to encourage travelers to go through their disorienting dilemma (Wolf et al., 2017). This task requires a subtle balance of pushing travelers out of their comfort zone while ensuring that those travelers are not pushed past their breaking point which will result in refusal to further engage in the transformative process (Walter, 2016). There is a gap concerning how practitioners could adapt their design to the personal specific ties of transformative travelers (Kirillova et al., 2017). For example, Wolf et al (2017) state that "few [studies] have examined specific elements of travel that contribute to the transformative experience" (p. 1653). Glocalization strategies can offer a means for practitioners to adapt their leadership style, communication, and team training to successfully guide travelers through their transformative process. Therefore, the following research question is formulated for the first chapter of the dissertation:

How are self-described transformative tourism practitioners engaging with tourists and local stakeholders to provide what they perceive as a transformative experience for tourists via the use of glocalization strategies?

As part of the literature review, a second gap is identified concerning the absence of a scale measuring the transformative process of travelers (Decrop et al., 2018). In a study of volunteer tourists, Knollenberg, McGehee, Boley, and Clemmons (2014) developed a scale to measure the expectations of volunteer tourists toward the structure of volunteer programs that aim at fostering transformation. More precisely, this scale measures pre-trip expectations (e.g.; cultural dos and don'ts and language courses), in situ expectations (e.g.; meeting destination residents, engaging in discussions, having time for self-reflections), and post-trip expectations (e.g.; keeping in contact with host families). However, this scale does not directly measure the transformative process of travelers. There have been calls to develop measurement to capture the transformative process of travelers and better understand the conditions under which it occurs to effectively assess it (Decrop et al., 2018; Wolf et al.2017). Different conceptual models for transformative tourism have suggested that this construct is multidimensional (Wolf et al., 2017).

Although there are some subtle differences, there appears to be commonality across the following dimensions: disorienting dilemma (e.g.; cultural shock, acculturation, and alienation), self-reflections (e.g.; self-examination, reflections about mortality, and embrace freedom), competence building (e.g.; socialization, skill developments, and adaptability), and change of points of views (e.g.; re-enchantment, development of new belief/opinions, and meaninglessness). The goal of the second study is to take into account the possibility of creating a scale that could effectively tap into the multi-dimensional construct of transformative tourism and clearly assess is specificities. Thus, the second research question is formulated:

What are the travelers' perceptions of their transformative tourism process?

The last gap that is identified is the difficulty of marketing transformative tourism experiences (Wolf et al., 2017). There are calls to focus on an effective way to promote transformative tourism (Wolf et al., 2017). During their extensive review of the transformative tourism literature, Wolf et al (2017) suggested that there is a crucial "need to convey relevant information [to the travelers] especially about experiential benefits" (p. 1667). They also suggest that future studies explore the role of symbols, imageries, and emotion in the way transformative experiences can be marketed to travelers. Some early work examines how transformative tourism is symbolized in books (Laing & Frost, 2017) and movies (Frost, 2010) and suggests possible ramifications concerning the development of marketing content about transformative tourism. Building on the importance of symbols, other studies suggest that transformative travelers engage in proselytism at home and encourage others to take part in transformative tourism (DeCrop et al., 2018; Noy, 2004; Wolf et al., 2017). Hence, the third chapter investigates the following research questions:

How and in what ways are transformative tourism narratives symbolized by travelers?

How can these symbols and narratives be used by transformative tourism practitioners to develop content marketing for their experiences?

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CHAPTER 1: TRANSFORMATIVE TOURISM ORGANIZATIONS AND GLOCALIZATION*

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 both the travelers' and the local communities' viewpoints. 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.* Results from the analysis of 37 in-depth interviews and organization documentation *reveal 16 glocalization strategies used to achieve three objectives: establish legitimacy in the community, break down cultural barriers in the organization, and design glocalized experiences.*

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) disorientation in the travelers is purposefully sought, 2) travelers are encouraged not only to be more tolerant and understanding of others' worldview but also to question their own intrinsic values, 3) there are powerful cognitive and psychological implications that go beyond simply having an encounter with residents, and 4) these organizations are not only concerned with

changing the attitude and behavior of the travelers at the destination but also aim at making those change last by leading travelers to become agents of change (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 travelers' past experiences, local community contexts, and program design elements into consideration (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 et al., 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 could be 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 travelers as well as local 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).

This study examines the usefulness of *glocalization* strategies by self-described transformative tourism practitioners (tour operators, program directors, and entrepreneurs). The

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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 gaining their support; and 2) developing loyal support from travelers by understanding their desires, being mindful of cultural differences, and developing services that fit their expectations.

We take a qualitative approach in this study, conducting interviews and website and document analysis 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" and encourage people to achieve their full human potential (p.27). "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 et al., 2017b). Examples of transformative tourism programs include, but are not limited to, mindful travel, volunteer tourism, study abroad, and pilgrimage-related trips (Reisinger, 2015).

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Building on the earlier work of Mezirow (1991) in transformative learning, Wolf,

Ainsworth and Crowley (2017) developed a conceptual model that includes triggers to the

transformative process and their outcomes. They suggest four dimensions for transformative

tourism experiences: "1) disorienting dilemma, 2) self-reflection, 3) resolution by exploring new

actions, and 4) development of new skills, attitudes and beliefs" (Wolf, Ainsworth, & Crowley,

2017, p. 1664). For example, travelers may face a disorienting dilemma, such as being

confronted with extreme poverty or other social, cultural, natural and/or politically intense

situations for the first time (Walter, 2016).

Self-reflection, the second dimension of transformative tourism, can then resolve internal

conflict as travelers consider how their privilege has shaped their worldview and how they

interact with others (Wolf et al., 2017). Through guided self-reflection methods, such as daily

journaling or nightly group conversations, travelers may reach an epiphany of sorts, resolving to

act differently (Coghlan & Gooch, 2011; Wolf, Stricker, & Hagenloh, 2015).

The third dimension of Wolf et al.'s model (2017) is resolution by 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 (p.1742).

Feelings of social connection can enhance travelers' desires to take matters into their own hands

and apply what they've 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. The intention of transformative tourism (at least the Weberian ideal type

of transformative tourism) is to 1) strengthen existing understanding of the global/local

intersection or 2) shift previously uninformed perceptions of the global/local intersection. Reisinger (2013) and Noy (2004) refer to this 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 et al, 2014; Noy, 2004), or can take the form of engagement in ecological, spiritual, or artistic projects back home that express new competencies (DeCrop et al., 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 become co-opted, emptied of its substance and used as a marketing ploy by tourism practitioners. As with eco-tourism, providing educational information about consumption and tolerant behavior at the destination does not mean that the travelers will 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). In its ideal form, Walker and Moscardo (2016) argue that transformative tourism research should explore ways to ease the difficulty of implementation of a global perspective for practitioners through all phases of the process. While past transformative tourism studies have focused on the demand side (Knollenberg et al, 2014) few studies have explored what it actually takes for practitioners to create settings that are conductive to transformation and coach the travelers through the emotional ups and downs of transformation. This study makes important contributions by investigating how self-described transformative practitioners create programs, develop activities, and train employees to lead travelers through their disorienting dilemma, encourage travelers to engage in critical thinking, and lead travelers to a path of self-growth via the use of glocalization

strategies. Therefore, the present study will expand the current theory of tourism by taking on a managerial and strategic approach to the development of transformative experience.

Glocalization Strategies And Transformative Tourism

Glocalization was coined by Robertson (1995) as a framework to explore how local communities could take better advantage of global exchanges. Glocalization examines how organizations can successfully expand their market in new countries by culturally adapting their services, communications, and marketing strategies to the local context (Matusitz, 2013). This 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 which are culturally sensitive (Salazar, 2005). The objective of gaining residents' support has been achieved using glocalization strategies such as prioritizing the local language and culture within the organization, hiring and training residents to take on leadership positions, and partnering with grassroots NGOs and community development projects (Lord, 2010). The objective of increased travelers' loyalty to the organization has been met through strategies such as creating the right physical atmosphere, personalizing experiences, and establishing a cultural bridge (Matusitz, 2016; Salazar, 2005, 2006).

Transformative tourism practitioners might perceive glocalization strategies to be a valuable way to shepherd 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; self-assessment), creating an atmosphere for meaningful cultural immersion (disorienting dilemma), storytelling that is inclusive of the local culture (self-assessment),, and adapting services to cultural preferences (all stages) (Lord, 2010; Matusitz & Lord, 2013, Simi & Matusitz, 2015). 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 that which is precious and unique about a place with what they can gain from sharing and interaction with the rest of the world.

Glocalization is not without its critics. Thornton (2000) argues 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 who determines which local elements should be included, what constitutes a locality, and how local residents are empowered (or not). Thus, glocalization can be criticized as being idealistic at best and neo-colonial 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 critiques are acknowledged and accounted for, glocalization may be able to form a foundation that could theoretically assist transformative tourism practitioners in their efforts to provide a transformative tourism experience. Based on an exhaustive review of the literature on glocalization, we identified thirteen key glocalization strategies and consolidated them into a table for ease of review (Table 1). The strategies were organized according to orientation toward community acceptance and support, tourists' acceptance and loyalty, or both. For example, diversity advocacy is linked both with gaining residents' support when managers decide to hire employees with different cultural backgrounds (Minei & Matusitz, 2013) and with strengthening travelers' loyalty to the organization by weaving elements of the local culture (e.g.; symbolic colors and religious customs) into communications (Simi & Matusitz, 2015).

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 (2015); 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)	Employees' feel responsible for connecting cultures with one another. Employees are valued for this ability. (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 (2015)	Incorporate local symbols into products/experiences (e.g., design a firm's logo based on the color symbolism of the local culture)

Our purpose is to answer Walker and Moscardo's (2016) call 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. While this study acknowledges the critical importance of understanding and including

the voice of each local culture as well as acknowledging unique aspects of particular travelers, this paper focuses squarely on the 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 to the same 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 engage 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. Just as grounded theory, in its truest sense, does not operate completely unfettered from previous knowledge, neither does an interpretivist perspective. Following this approach of acknowledging previous theoretical knowledge, we utilize the glocalization framework as a starting point for this research and use it as a stepping stone for our investigation of transformative tourism.

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, program director) in an organization that self-described as a transformative tourism provider. This ensures that the informants had enough knowledge about the glocalization strategies used by the organizations with regards to program design, communication, human resources, and relationship with local community. To be considered for the study, a specific set

of criteria were developed based on the literature on transformative tourism, including and was used to identify invited organizations from potential ones:

1) Intentional and sustained interaction between travelers and residents

2) Interactions are designed to be enriching for both participants and residents

3) Opportunities for travelers to engage in self-reflection

4) Travelers are pushed outside their comfort zone

5) Encouragement of skill development and cultural understanding

6) Consideration of the local natural environment

7) The organizations engage in socially responsible development

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

Potential organizations were found through a third party (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 through the online search engine GoAbroad.com. The roster of the members of these associations were used to identify names of organizations, their contact information, and their website. All informants were invited to take part in the study via email. Although emails were send to both English and French speaking organizations, all interviews were conducted in English. Snowball sampling was also utilized when informants were asked at the end of each interview: "Do you have recommendations about other organizations to interview?" Evidence of the transformative nature of each program was confirmed through the examination of mission statements, values, itineraries, charters, and manifestos on organizations' websites.

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

Of the 150 invited, 37 organizations agreed to be interviewed. The low response rate is not unusual with these types of tourism organizations, particularly due to timing: interviews were conducted during the northern hemisphere summer at the height of the busy season (June-

September). Some organizations were reticent to participate due to past negative experiences with other research projects. Other factors might have come into play, as well, including lack of prior contact with the research team and the necessary lengthiness of the introductory email to ensure that all ethical components were addressed. There was no pattern of size, types (e.g.; NGOs/for profit), number of destinations offered, or headquarters location with regard to non-respondents.

The informants were invited to participate in the study via a personalized email. Interviews were conducted via video conference and phone calls. Participating organizations included for-profit (22), for-profit with a foundation (6), non-profit 501c3s (3), and NGOs (8). Areas of transformative tourism included in the study were volunteer tourism programs, study abroad, adventure travel, and cultural travel. Table 2 displays descriptive information about 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), United Kingdom (4), the United States (18), and Vietnam (1) . The participants were assigned aliases and the name of their organization was concealed. Recruitment of additional participants was stopped after data saturation was reached (Marshall & Rossman, 2014).

Data Collection and Analysis

The qualitative methodology was chosen because of the exploratory nature of the topic and because we wanted to make sure that we capture the full complexity of situations encountered by practitioners as well as the breadth of strategies used. 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 document and website analysis was chosen to develop a deeper understanding of the background of the organizations, understand how they chose to present themselves to the public, and how they are projecting themselves in the future. While these are important sources of information, the primary source of data came from in-depth interviews. The use of phone/video in-depth interviews was chosen because it allow us to easily contact informants from across the globe, probe for more information/clarification when needed though additional questioning, as well as gather rich data about the complex phenomenon of interest

While the 13 key glocalization strategies included in table 1 where discussed in a piecemeal manner across the various articles reviewed. This set of strategies was developed in an inductive manner by classifying all of the strategies mentioned in the reviewed articles, combining strategies into a coherent categories, and creating individual definitions that where congruent with the end-goal of each strategy. Those strategies were very broadly used to develop an open-ended interview guide designed to maintain consistency (Maxwell, 2012) while letting participants express freely the strategies used in their organization. While the interview script was loosely based on the glocalization strategies, much space was made for informants to stretch beyond those strategies to either 1) include additional strategies or 2) 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?" If informants mentioned that the first step of any program development was for them to hold a meeting and/or develop partnerships with local businesses, these codes were assigned to the *establishing community partnerships* strategy before being assigned to a main objective.

Interviews lasted from 45 minutes to an hour and generated over 350 pages of transcribed text. The sole interviewer took notes on the verbal cues of the participants, (e.g., tones of voice, hesitations, speech patterns, and use of humor) which were needed to develop thick descriptions and contextualize the conversation between the participants and interviewer (Bailey, 2007). While the glocalization strategies were used as a jumping-off point, informants were given many opportunities and encouraged to go beyond the interview guide and include additional transformative tourism strategies. All interview data are strictly the perspectives and observations of the practitioners rather than objectives measures of actual implementation.

Prior to data analysis, the detailed transcript was sent via email to participants for member checking, inviting informants to make edits (Creswell, 2015). In the sole case where the researcher transcribed text differed sharply from the suggested changes requested by a participant, a memo was created to take note of those differences, and both versions of the transcripts were saved.

The raw data were analyzed via conventional coding (Creswell, 2015). During the open coding phase, a broad range of codes was identified and grouped into strategies (Marshall & Rossman, 2014), using glocalization as a guide and intentionally allowing for and expanding beyond its limitations. During the axial coding phase, strategies were refined into objectives sought by practitioners in the four components of the transformative tourism process, and supporting quotes were identified and woven into storytelling (Bailey, 2007; Marshall & Rossman, 2014). 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.

Building on the concepts developed by Lincoln and Guba (1985) and recommended by DeCrop (2004) as a way to escape the limitations of traditionally positivist criteria of generalizability, validity, and reliability, trustworthiness was assessed through four criteria: credibility, transferability, dependability, and confirmability. Credibility was enhanced by collecting data through different sources (i.e., in-depth interviews, website analysis, strategic plans/impact reports) and by establishing member checks. Transferability was reinforced via the use of thick descriptions and a broad sample. Dependability was strengthened when authors examined the data separately. All codes and memos were originally generated by the first author, then reviewed by the second author and all three authors discussed relevant meanings and possible re-conceptualizations at length. . Confirmability was also reinforced through member checks, memoing, and reflexivity on 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 during coding as part of an audit trail (Creswell, 2015). During each of the interviews, observations and insights focusing on the settings (e.g., distracting noises on the line) and content (e.g., 'Was the probe effective?') were recorded. The objective was to use these memos as markers of how the interview process was conducted and evolved so that an external reviewer could understand why changes took place and if those changes could have impacted the results. During coding, memoing was employed to keep track of the evolution of code names and emerging ties between codes. Memoing at this stage also included questions raised by the coding, possible holes in the analysis, possible links with theories and concepts, as well as difficulties encountered and disconfirming evidence. Additionally, memoing was used to provide a detailed map of how the codes emerged from the data so that external reviewers could understand how each code originated and check if they reached similar interpretations.

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

Findings

The research problem 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 revealed 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 from the two objectives and 13 strategies previously outlined in Table 1 into a new framework of three objectives and 16 strategies (Figure 1). These objectives are: (1) working with the local community to establish legitimacy, (2) breaking down cultural barriers within the organization, and (3) designing glocalized experiences to trigger transformative outcomes. Three additional key strategies are: favoring collaboration over competition, acknowledging employees as agents of change, and implementing post-trip contact and facilitation. The transformative process is depicted at the heart of the framework, as it is informed by the practitioners' perceptions of glocalization strategies.

Figure 1: Glocalization Framework for Transformative Tourism

Establish legitimacy in the community

Foster cultural understanding
Favor collaboration over competition
Use localized discourse
Create leadership programs
Establish community partnerships

Break down cultural barriers in the organization

Acknowledge employees as agents of change
Encourage diversity advocacy
Create personalized experiences
Adapt hiring polices

Transformative process

Disorienting Dilemma

Self- Reflection

Resolution by Exploring New Actions

New Skills, Attitudes & Belief

Design glocalized experiences
Create the right physical atmosphere
Manage expectations
Establish a cultural bridge
Enhance staff awareness
Develop storytelling
Incorporate symbolism
Implement post-trip contact and facilitation

Legend

Transformative process

Glocalization strategies used by practitioners

Links between strategies and transformative process
Links between strategies

Establish legitimacy in the community

The organizations studied employ an array of glocalization strategies they believe help 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). Developing legitimacy in the local community can translate to perceptions of legitimacy in visitors through the provision of more authentic experiences (DeCrop et al., 2018). Informants reported the following related glocalization strategies: establishing community partnerships, creating leadership programs, fostering cultural understanding, and using localized discourse (Figure 1). Additionally, a new glocalization strategy of favoring collaboration over competition emerged from the analysis.

In keeping with the work of Matusitz and Lord (2013), informants were eager to develop legitimacy with both the community and tourists through successful community partnerships. For example, Matusitz and Lord (2013) described how organizations can earn legitimacy by partnering with well-respected local NGOs. Informants not only partnered with local programs, but also used those programs as an opportunity to develop transformative encounters between travelers and residents benefiting from the programs. When talking about his volunteer tourism partnership involving protecting turtle nests in Costa Rica, one informant explained that:

"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 led 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 get in the way of 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 think that's okay. I'm proud of that decision. I don't think we did anything wrong there.

Quintin, For-profit, North America

Several informants perceived transformative learning *within* their organizations as an inherent social need, an action previously observed by Matusitz and Lord (2013), who suggested

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that glocalization strategies can only succeed when organizations are able to recognize the pool of talent among their employees and Salazar (2005), who described the importance of providing quality and personalized training. Informants echoed those findings and added the importance of developing capacity building so that local residents can access top leadership positions in the organization. Hiring residents for key leadership positions 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 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. An additional concern for NGOs and not-for profit is the need to have systematic way to measure the transformative impact of their programs and share those outcomes with donors and board members. Supporting the previous work of Matusitz (2011) and Minei and Matusitz (2013), who explained 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 is to acknowledge and respect the social structures put in place by community residents, to ensure a consensus on the presence of the organization in the area.

> *We really look to the local partners to determine how travelers can best fit into what's already happening. We are not looking to develop programs specifically for travelers. We*

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look more 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

As recognized in the work by Simi and Matusitz (2015), several informants stressed

adapting their discourse to the local context to ensure that their roles and activities are well-

perceived by the community. Simi and Matusitz (2015) explained that community acceptance is

based on the 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 with a non-profit in North America, during the launch of a new

school-focused volunteer tourism child sponsorship program in Zambia. She explained that the

word "sponsor" in Zambia implies involvement thorough the life of a child and realized 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 White Savior power dynamic that we're not at all

about.

Caroline, NGO, North America

An excellent example illustrating the importance of conflicting socio-cultural codes is

from Paige, who 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

Interviews revealed that an additional glocalization strategy used by transformative tourism organizations not previously observed or acknowledged in the glocalization literature is favoring collaboration over competition. 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, informants were able to reinforce the message that they care more about the well-being of the local community rather than focusing solely on profits.

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 glocalization strategies they perceived as helpful in breaking down cultural barriers within the organization: adapt hiring policies, encourage diversity advocacy, and create personalized experiences. Additionally, a new strategy emerged as being crucial for transformative tourism organization: acknowledging employees as agents of change.

In keeping with the work of Matusitz (2010, 2016), informants frequently referred to how they had adapted their organization's hiring practices to the local work culture and treated local employees as extremely valuable cultural brokers to help the organization navigate the glocal/local interface. Informants of transformative organizations were also going a step further by actively encouraging the empowerment of minorities through hiring practices. For example, Rachel exemplified how the hiring policies evolved in her organization to reflect the need for local leadership, as she was the first female Costa Rican manager hired by her organization, with more local people being hired each year. As mentioned in the impact report of one organization, and in keeping with the work of Matusitz (2011), having a diverse team is crucial to obtaining novel insights and creative inputs that will improve the 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 perspective.
2016 Sustainability Report, For Profit, North America.

Informants often use their abilities to adapt programs and encourage product development that weaves elements of the local culture with elements of the travelers' cultural background, creating a personalized experience for tourists. Although the programs were personalized to the traveler's taste, careful consideration was made to maintain the integrity and authenticity of the local culture. This aligns with Salazar's (2006) concerns about neo-colonialist attitudes in traveler-glocalized views of local languages and customs. For example, Jennifer describes how each of her study abroad programs weave 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 leaves the guides to wonder whether their interactions with travelers were indeed effective in triggering changes, as they are not able to witness post-trip transformations. Several informants mentioned that it is crucial to acknowledge this for guides to recognize themselves as change agents. Sharing positive testimonies and letters from visitors served as one strategy to enhance staff awareness and value.

> *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

Transformative tourism guides are the eyes and ears of the organization, witnessing factors that hinder or foster the transformative process. Because of this, informants stress that it is crucial to encourage open communication among employees across all levels. However, varying cultural interpretations of power differentials can sometimes stifle exchange. As a result, these organizations adapt their internal communication to make local employees feel included.

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.

It's very, very helpful to include a good working environment for everybody.

Irvin, For-profit and foundation, Asia

By creating a space for meaningful interactions, Irvin makes his employees feel valued and encourages them to make suggestions or voice critiques in a constructive manner. While this will not completely eradicate deeply-entrenched power structures that are often in play within and across local residents, tourists, and transformative tourism organizations, the fact that the organizations acknowledge the power structures is a step in the right direction.

Designing Glocalized Experiences to Trigger Transformative Outcomes

A final set of glocalization strategies focus on designing experiences to trigger transformative outcomes. These include managing expectations, increasing employees' awareness, establishing a cultural bridge, creating the right atmosphere, and incorporating symbolism. A newly discovered strategy of implementing post-trip contact and facilitation has also emerged from the interviews.

Many informants discussed the importance of structuring discussion and reflection time ahead of the disorienting dilemma. This is in alignment with Knollenberg et al. (2014), who found that travelers have different expectations with regards to the degree of transformation they expect from participating in volunteer tourism programs. Informants explained that managing transformative expectations is a delicate area requiring skill and expertise, 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/Foundation in Asia begins this discussion ahead of the trip on their organization's website.

> *Sorry, this is the bit where 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: 1) A sense of adventure, and 2) A sense of humor.*

Although transformative tourism experiences could certainly happen without structured programs (Kirillova et al., 2017b), most informants perceived that they facilitated the transformative process of the travelers through specific activities. Some informants also recognized that not all participants approach the experience in the same way. Some tourists are mentally prepared to have a transformative experience, while others are more reticent or skeptical. Quintin, like several informants, jokingly referred to their techniques with the latter category as "tricking" or "fooling" tourists into transformative experiences, luring them with incredible natural and cultural activities:

> *Essentially, we're tricking our guests. We're getting them into our system to swim with beluga whales or experience the Northern Lights or to lock their gaze with a wild polar bear. Once we've got them in our system, we educate them. Our position is that way more people are going to be searching for and buying the romance of a trip to Churchill as*

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opposed to people searching for educational vacations.

Quintin, For Profit, North America

Guides purposefully introduced sensitive topics, such as cultural differences, power

inequity, natural and social issues, at the destination early on in the experience. This finding

parallels the work of Salazar (2006), who reported how guides trained on glocalization strategies

do not shy away from topics such as poverty and female genital mutilation. Further commenting

from a managerial perspective, Peter, from a for-profit in Africa, explained that the top

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. For us, 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*

The glocalization strategy recognized in the previous literature by Salazar (2005) and

Wijeratne, Van Dijk, Kirk-Brown, and Frost (2014) of increasing employees' awareness of their

role in making tourists comfortable was also frequently referenced by informants. Adapting the

guides' discourse to the interest and comprehensive knowledge of the 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 relates how she took a traumatic event

as an opportunity to explain to the 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 in 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 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, like, 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 raises the question of whether visitors can adequately make connections between

their privilege at home and the poverty they may witness. This may be difficult for even the most

politically-sensitive tourists. Although Salazar (2006) emphasizes the importance for the guides

to discuss common cultural references and make direct comparisons between their home country and the ones of the travelers, informants suggested that those comparisons are made more complex by the sometimes prejudicial comments contained in foreign 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' mind:

> *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 on 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 used by informants to trigger self-reflection in travelers and 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 and having a transcending power. Developing on these previous findings, 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 Polar circle and shares how traditional, sustainable hunting is the only way to provide food for one's family. Quintin explains how the travelers' experience a change of opinion after listening to the trappers tell their own personal 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 an atmosphere

that is conducive to cultural interactions, providing strong support for the work of Thompson

and Arsel (2004), who detailed the importance of creating a third space where both local and

global culture can safely co-exist with one another. 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 to interact with one another and break the initial awkwardness of the

first encounter so that people from very different backgrounds and cultures can learn from one

another. For example, Madeline explained how physical space such as a kitchen can foster

interaction between both travelers and hosts:

We want clients to get out of their comfort zone. Our travelers go in the kitchen to help

cook their own meal and learning new recipes. This is an opportunity for them to learn

how a meal is cooked in an indigenous village.

Madeline, For-profit, South America

Many informants explained how they incorporate symbolism through games to facilitate

discussion of sensitive topics, introducing an entertaining and enjoyable element into the mix.

This is in keeping with the work of Giulianotti and Robertson (2007), who suggest that symbols

play a great part in how individuals negotiate and interpret their meaning schemes. Kenneth provided one of the best examples 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 reinforced 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 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*

Kenneth was adamant about the use of exercises to defuse difficult discussions about power and privilege, a key critique of both mainstream tourism and transformative tourism. By using symbolic representation to de-personalize the context, groups are able to see the intersection of structural and individual forces at work.

The post-trip self-reflection component (often termed as "meaning-making") has also been acknowledged as a necessary component of transformative tourism (Reisinger, 2013). Examples of post-trip strategies utilized by transformative tourism organizations include access to trip organizers by text, 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 additional disorienting dilemmas the tourist might experience upon return home is a unique strategy not previously recognized in the glocalization literature but well-documented in the transformative tourism literature (DeCrop et al., 2018). It has also been found to be important in parallel nonformal learning fields as well, such as environmental education (Stern et al. 2014). Fortunately, 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

This study investigates how self-described transformative tourism practitioners engage with tourists to create what they perceive as transformative experiences via the use of glocalization strategies.

This study reveals three key findings. First, an additional glocalization strategy emerges under the objective of establishing legitimacy in the community: favoring collaboration over competition. Transformative tourism organization can successfully become agents of change if they are not simply engaged in cooperation but rather in collaboration. Expanding on the work of

Jamal & Getz (1995), informants mentioned a difference between simple cooperation and collaboration. As stated by Brooke, she views the role of her organization as not simply to work with local partners (i.e.; cooperation) on a sustainable project but also to develop projects based on common goals and values (i.e.; collaboration). Transformative organizations use glocalization strategies with the intent to develop fruitful collaborations with communities based on trust, shared ethical standards, long term goals, and working hands in hands to develop new transformative tourism programs".

To minimize the effects of neo-colonialism and neo-liberalism, informants further explained that they actively work on understanding the ground situation and assessing the community's expectations. For example, when Caroline realized that the word "guardians" could be construed as neo-colonialist, her organization was eager to learn from their communication mistake and swiftly implement solutions to rectify the situation. In other words, transformative tourism practitioners perceive that transformation via glocalization is not only limited to the travelers, but also transpires in the way organizations evolve and develop partnerships in the community. This finding parallels the work of Cockburn-Wootten, McIntosh, Smith, and Jefferies (2018) who suggested the importance of open communication and reaching across communication channels to develop sustainable and inclusive forms of tourism partnership.

The second essential finding is that the transformative tourism practitioners reported that the glocalization strategies of adapting hiring policies, encouraging diversity advocacy, and personalizing experiences which can likely lead to a richer experience for all involved during every step of the transformative process. Perhaps one of the most exciting findings from this research is the emergence of the importance of acknowledging employees as agents of change, particularly *beyond the experience itself*. Employees are not able to witness the post-trip changes

occurring in the travelers' lifestyle, attitude, and behavior. This suggests the importance of post-experience follow-up or evaluation coupled with internal reporting to tour guides.

Indeed, this key finding suggests that increasing employees' awareness of the transformative process can spur them to discuss sensitive subjects, pinpoint where travelers are currently situated in the transformative process, overcome negative surprises with might arise during the trip, and have a plan for diffusing tense situations and interactions. By establishing a cultural bridge between their employees and travelers, practitioners can develop practices, such as reading the international press, to enable employees to better understand where cultural prejudices come from and how to address them. Through storytelling and symbolism, tour guides can ease the discomfort felt during the disorienting dilemma and subtly guide travelers through self-reflection and resolution, creating safe space for discussions to occur in which the plurality of viewpoints are valued.

A third key finding is that practitioners' perspectives illustrated the value of glocalization strategies for designing experiences that possess strong storytelling, clear symbolism, and an atmosphere conducive to self-reflection. Although ultimately the choice to engage in transformation is undoubtedly a personal one, practitioners have developed a set of tools to purposefully assist travelers as they engage in self-reflection and negotiate new understanding of the world. Informants were wary to advertise transformation as a secure end-goal of travel. Rather, most advocated a more subtle approach relying on their ability to design meaningful encounters, group discussion, and games to engage travelers on the path of transformation. The practitioners included in this study perceived glocalization strategies as useful tools to plan and implement programs design to create transformative experiences.

Similarly, Coghlan and Gooch (2011) suggested that certain forms of activities are more conductive to transformation than others and should be considered by organizations when

developing transformative tourism experiences (e.g.; theatre/ role plays, singing, and meditating). Building on their work, the present study suggests a more complex picture in which organizations should actively consider to the role given to employees in coaching the travelers through transformation, pushing the travelers out of their comfort zone while maintaining the level of disorientation to a manageable level, and developing a capacity to consistently adapt one's discourse and action to an ever evolving situation. This was exemplified in the way Fiona handled the death of the giraffe and Brooke dealt with the shoes situation. Those findings are also in line with the work of Nicholls (2011) who suggested that during cultural shock travelers feel like they have lose control and that co-created experiences can be used to give back a sense of control and decrease this initial feeling of insecurity and vulnerability.

There are also theoretical limitations. As with any model, creating a black and white framework in a world filled with grey areas is limiting and oversimplified. Distinct lines between strategies may be hard to detect empirically, as actual practices often overlap conceptually. Similarly, the study assumes a certain level of control on the part of the transformative tourism organization, when this is in fact dependent upon numerous individual, political, and structural forces. This was exemplified by the difficulties encountered by Paige to discuss women's empowerment via a male translator, and Quinn's relating prejudices present in foreign media that each represents structural forces beyond their control.

Additionally, the concept of community was used in a homogenous sense. A community is a socially constructed concept and is likely to regroup individuals with a broad spectrum of worldviews, expectations, and concerns with regards to community development. The aim was not to take on a reductionist approach but rather to define community in terms of geography, neighborhood, and locality in order to discuss the local/global interactions which are at the heart

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of glocalization. An opportunity thus exists for expanding upon this work to address the different of social construction of community and their implications with regard to glocalization.

Further, the glocalization framework stresses finding a balance between global and local forces but does not necessarily include ways to give residents opportunities to have an ownership stake in the venture, receive shared profits, nor systematically ensure equity in the distribution of benefits. Likewise, 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 these concerns. Moreover, the framework, on its own, doesn't address diversity within the community. It also crucial to recognize that other economic paradigms exist and could be combined with the glocalization framework such as the concepts of alternative economy, hopeful tourism, sharing economy and fair trade. Transformative tourism can also be recognized as alternative way to construe global/local relationship and when combined with socially responsible principles, can complement the existing framework of glocalization and address some of issues raised by economic and social inequity. However, the original conceptualization of glocalization does not explicitly address issues such as fair trade and social justice. Additionally, the glocalization framework assumes that the blend of local and global is both inevitable and beneficial, whereas the research is inconclusive in this area.

The opportunity for future research in this area is nearly boundless. Following on the work of Knollenberg et al. (2014), it is time to develop a transformative tourism outcomes measurement scale. This would allow practitioners to measure more accurately the nature and the extent of transformation among travelers across diverse contexts. This would enable the study of the relative influence of the factors identified here (and others) on transformative outcomes (Stern & Powell, 2013). Of course, this assumes that transformation is indeed consistently desirable and that one can measure experience and transformation.

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Although the development of experiences in a setting such as tourism is a complex and deeply personal process, developing such a scale would be attractive to tourism organizations, such as NGOs, that need to share objective measures of success about the transformative nature of their tourism programs, have numbers to back up their transformative claims, and allow them to develop strong grant applications by measuring the impact of their programs through time and across different contexts. The literature about experience also suggests that it is possible, at the very least, to develop measurement that capture some of the outcomes of the transformative process. For example, Kirillova, Lehto, and Cai (2015) have developed a scale that effectively measures how travelers are transformed, both positively and negatively, by their travel experiences in terms of intercultural sensitivity. The use of other innovative research methods, including as experimental design, comparative studies, photo-elicitation, ethnography, and longitudinal studies, to test the glocalization framework under a variety of contexts could reveal fascinating and valuable findings.

The intersection of glocalization and mainstream tourism is also ripe for research and includes important managerial implications. The glocalization framework could be applied to facilitate the adoption of transformative processes by mainstream tourism, valorize local culture, offer memorable experiences to visitors, foster tourism entrepreneurship (Matusitz, 2011), develop sustainable forms of indigenous tourism, and position peripheral destinations in a global marketplace (Cawley, Gaffey & Gillmor, 2002). Glocalization strategies are also described by tourism practitioners as being useful managerial tools to uphold a transformative tourism organization's standards of being socially and ecologically responsible. For example, being socially responsible is vital to maintain a positive work culture, empower and retain highly knowledgeable employees, and provide social equity with both employees and residents. For example, an organization can decide to voluntarily hire employees from different community

households to ensure that the benefits trickle down to multiple families. In an era where tourism

is both literally and figuratively at a crucial crossroads for its ecological viability further

application and exploration of glocalization strategies to both transformative tourism as well as

mainstream tourism holds great promise for a broad spectrum of tourism experiences.

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CHAPTER 2: DEVELOPING AND TESTING THE TRANSFORMATIVE TRAVEL EXPERIENCE SCALE (TTES) *

Abstract

Transformative travel encourages travelers to self-reflect, question their assumptions, and develop a more tolerant worldview. Few studies have attempted to develop a scale to measure the complex transformative travel experience. However, there is demand for a scale that allows practitioners to measure the transformative experience of travelers who take part in their transformative tourism programs. This study focuses on developing a Transformative Travel Experience Scale (TTES). On a methodological perspective, the study reinforces DeVellis' procedures on scale development by clearly labeling a four steps to determine the conceptual boundaries of transformative travel experiences. The study reveals that a four dimensional scale, composed of the dimensions of local residents and cultural assessment, self-assurance, disorienting dilemma, and joy, can be successfully used to measure the transformative travel experience.

Key words: disorienting dilemma, transformative learning, transformative travel experience, scale development, self-reflection

Introduction

Transformative travel is defined by Phillips (2019, p. 68) as travel "that places the individual in a novel context that forces him or her to develop new resources and respond creatively to challenging situations, which ultimately" adjust "taken for granted perspectives, behavior, lifestyle and relationship with the world." Thus, travelers are permanently and positively changed to their core by a tourism experience. The objective of this study is to develop a scale to measure this transformative travel experience.

The transformative travel phenomenon is representative of a general shift toward experiences that are not only satisfying for travelers but also answer a deeper intrinsic need to consume in a manner that is fulfilling and highly personalized (Lean & Staiff, 2016; Pine & Gilmore, 1999). However, what sets transformative travel apart from other types of tourism experiences is its focus on triggering permanent and positive changes in the way we consume and interact with others (Smith, 2017; Wolf, Ainsworth, & Crowley, 2017). As stated by Kirillova, Lehto, & Cai (2017a, p. 13) transformative travel is leading the tourism field into "the next-generation experience economy (3.0) that places a premium on experiences that meaningfully transform a consumer." Indeed, transformative travel aims at changing the behavior of travelers not only at the destination but also upon their return home by encouraging them to become agents of change in the community (Lean, 2009). This potential for change represents an extremely valuable asset at a time when experts are calling for immediate actions to counter the negative impacts of global trends such as climate change and increases in intolerance and extremism (Smith, 2017). As with any form of tourism, transformative travel is not without its critiques, but it has the potential to cultivate change and instill new norms related to the way individuals interact with the ecological environment as well as with fellow human beings.

While there is potential to gain positive global results from transformative travel currently it is challenging to measure the transformative experience of travelers. The development of a Transformative Travel Experience Scale (TTES) has valuable practical, methodological, and theoretical implications. A scale would allow tourism practitioners to measure their accomplishment of transformative goals, compare their program with competitors, map a program's evolution, and improve the skills of tour guides who coach travelers through their transformation (Walker & Moscardo, 2016; Walker & Weiler, 2017). This is also likely to

be particularly relevant to Non-Governmental Organizations (NGOs) that are asked to share evidence of their program's transformative power when applying for grants and approaching donors (Ebrahim, 2005; Prince & Ioannides, 2017). When combined with more in-depth assessments such as qualitative interviews, the quantitative measurements offers by a scale provides additional support to the claims advanced by transformative tourism practitioners and can strengthen the storytelling used to promote transformative experiences.

A Transformative Travel Experience Scale will provide many benefits, but its creation is not without challenges. In order to develop a reliable and valid scale, this study reinforces DeVellis' (2016) procedure forscale development. While the model developed by DeVellis (2016) offers guidance with regard to item creation and evaluation, Podsakoff et al. (2016) fortify DeVellis' focus on construct definition by clearly labeling a four steps to determine the conceptual boundaries of a construct. This emphasis on conceptual boundaries is highly relevant for transformative tourism as Koleth and Allon (2016, p.61) indicate "there is a difficulty in defining and drawing the limits of the kinds of transformation that occur." Hence, a strong focus on conceptual boundaries offers a coherent approach to investigate the transformative travel experience.

The creation of a Transformative Travel Experience Scale is also relevant from a theoretical point of view. There is an ongoing debate in the literature about the nature and steps involved in the travelers' transformative experience (Hoggan, 2016). A specificity of the transformative travel experience is that it combines both outcomes and processes in a series of steps (Hoggan, 2015, 2016). In other words, transformative travelers need to go through the processes of being disoriented and questioning their own perceptions for them to reach outcomes such as developing new worldviews and changing their behaviors to live in accordance with those new worldviews (Mezirow, 2018). The travelers' behavioral expressions of their new

worldview is itself considered to be the final step of the transformative experience (Saunders et al. 2013). Further, questions are raised about the temporality in which the different steps are occurring in the transformative travel experience (Kirillova, Letho & Cai, 2017c). Developing a scale offers a complementary way to empirically test the boundaries of the construct of transformative travel experience across a large population of travelers and find commonalities between their lived experiences across diverse contexts. The aim of this study is not to take a reductionist approach of what is undoubtedly a highly personal and complex cognitive process but rather to offer a practical, sensible, and efficient scale for tourism organizations to measure transformative travel experiences.

Literature Review

The concept of transformative travel originates from Mezirow's (1991) theory of transformative learning (Reisinger 2013). In this theory, Mezirow (1991) recognizes that individuals have a tendency to reject ideas that go against their worldview because they perceive them as threatening to their understanding of how society should function. Further, individuals have a natural tendency to stay within their comfort zone because it provides them with reassurance, consistency, and stability (Hoggan, 2016).

This raises the question of how travelers can actually challenge their worldview and go out of their comfort zone (Phillips, 2019). As a solution, Mezirow (2003) postulates that travelers are pushed to reassess their worldviews when faced with a problematic situation for which they are unable to formulate a solution. Mezirow (2003) dubs this challenge a *disorienting dilemma*. When encountering a disorienting dilemma, travelers are confronted with the fact that their previous knowledge is suddenly useless (Frost, 2010). This disorienting dilemma could be triggered by significant events in the life of the travelers (e.g., divorce or death of a loved one) and by epiphany types of experiences (e.g., meaningful and prolonged encounters with residents

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from a different culture) (Folmer et al., 2019; Kirillova, Lehto, & Cai, 2017b; Laing & Frost, 2017).

The transformative theory further states that travelers can only change their worldview if they are willing to actively reflect on their biases and engage in an internal "dialogue involving the assessment of beliefs, feelings, and values" (Mezirow, 2003, p. 59). Otherwise, the transformative experience will fail because travelers refuse to question their assumptions. For example, Mezirow (2003) mentions that travelers who have ethnocentric tendencies and visit a foreign country can decide to focus on the "perceived shortcomings" of the residents and reinforce their own prejudices or these individuals can develop more tolerance toward others by "becoming aware and critically reflective of their own bias" (Mezirow, 2003, p.7). Hence, the travelers' ability to engage in reflection is the principal reason why travelers question the relevance of their assumptions (Phillips, 2019). For this reason, Mezirow's theory is crucial to understanding how travelling can be an opportunity for individuals to questions their attitude toward tolerance, equity, and consumerism (Smith, 2017).

In his theory, Mezirow (1991) outlined ten steps individuals undergo during a transformative experience . During these ten steps, individuals encounter new worldviews that trigger incomprehension, reflect on how sociological and subconscious biases might have shaped their initial negative reactions to a disorienting dilemma, adjust the lenses through which they see the world, come to a new understanding of the situation, and apply new perspectives to their daily life (Mezirow, 1997). This theory implies a change in one's worldview which is lasting and triggers behavioral and attitudinal changes (Hoggan, Mälkki, & Finnegan, 2017). Thus, Mezirow's transformative learning theory is characterized by a voluntary reflection on one's world view that generates long-lasting life changes (Hoggan, 2016).

Like any theoretical framework, the transformative theory also faces limitations and criticisms that need to be acknowledged. The ten step model is criticized for being too linear (Mezirow, 1994). In a meta-analysis study, Taylor (1997) reports participants in several studies experienced only some of the steps and not necessarily in the order described by Mezirow. More recently, there are indications that transformative travel needs to be conceptualized in a more complex manner that takes into account differences in term of mobility and temporality (Lean, 2015; Saunders, 2014). A specificity of transformative travel is that it entwines both corporal travel (e.g., travelers being physically present at the destination) and psychological travel (i.e., constant flow of reflections and ideas evolving in the travelers' mind) (Lean, 2012). Kirillova, Lehto, and Cai (2017b) echo this critique when they note that more importance should be given to temporality as they find that interviewed travelers only experience a disorienting dilemma after their return home. Illeris (2014) further suggests that transformative learning can even result in *regressive* transformations. These regressive transformations can occur when individuals fail to overcome a disorienting dilemma and decide to withdraw from social interactions (Illeris, 2014). Thus, a scale measuring the transformative travel experience needs to take into account these possible differences with regard to exploratory factor analysis.

Another critique is that important variations can occur with regard to the degree of transformation experienced by each individual (Hoggan, 2016; Phillips, 2019). In her comprehensive review of transformative tourism, Phillips (2019, p. 35) mentions that "different individuals may process and interpret an event completely differently, depending on their cognitive capacity." Mezirow (2003) himself concedes that the transformative experience is described as occurring in ideal conditions under which individuals have access to all needed information, are not being pressured, have the ability to engage in critical reflection, and have equal opportunities to participate. These variations in degrees of transformation are why Hoggan

et al. (2017) suggest that it is crucial to measure transformation by looking at the depth and stability of the self-reported transformative changes.

An additional critique is that Mezirow's early model is failing to include the full gamut of emotions felt by individuals during a transformative experience (Dix, 2016; Merriam, 2008). In his original conceptualization of the theory, Mezirow (1991) only mentions the presence of negative emotions during the disorienting dilemma. However, recent developments in the conceptualization of the transformative theory suggest that transformative travelers experience a broad range of emotions such as horror, bitter sweetness, nostalgia, joy, and euphoria both during and after the experience (DeCrop et al., 2018; Hoggan et al., 2017; Kirillova et al., 2017b; Laing & Frost, 2017). More precisely, travelers are likely to experience something very similar to reverse culture shock upon their return home (DeCrop et al., 2018; Kirillova et al., 2017c). Travelers have been who deeply immersed in another culture can even express feeling alienated from their own culture upon their return home (Kirillova et al., 2015). The change in worldviews resulting from a transformative travel experience is so powerful and dramatic that travelers feel like they do not fit anymore with their previous circle of friends, feel less tolerant toward consumerism, and are more irritated when other individuals express a lack of global awareness (Coghlan & Weiler, 2018; McGehee & Santos, 2005). Thus, this irritation is not directed toward the destination's culture but is rather expressed against one's own culture (Noy, 2004). These rush of negative emotions after the return home prompts Kirillova et al. (2017c) to suggest that the disorienting dilemma is not occurring at the destination, as first conceptualized by Mezirow (1991), but is rather occurring after the travelers come back home.

Although Mezirow's theory faces critiques, it has triggered fruitful and ongoing discussions across multiple fields which has allowed the theory to mature and strengthen over time (Kitchenham, 2008; Kucukaydin & Cranton, 2013; Moyer & Sinclair, 2016; Newman,

2012, 2014; Taylor, 2007). Phillips (2019) also suggests that Mezirow's theory is considered a pinnacle of adult learning thanks to the contribution of many researchers across different disciplines and theoretical foundations.

Measuring transformation in tourism: Model development

While the theoretical foundation for transformative learning is strong, there is a paucity of research focusing on measuring the transformative travel experience (DeCrop et al., 2018). This gap is significant to address because transformative practitioners benefit from having a measurement tool that allow them to efficiently measure the influence that their programs have on the transformative travel experience and implement necessary changes to improve their program overall design (Soulard, McGehee, & Stern, 2019). Measuring transformative travel experience is also crucial to assess the quality of interactions between employees and travelers (Soulard, McGehee, & Stern, 2019; Walker & Weiler, 2017). In their study of tour guide training, Walker and Weiler (2017) suggest that it is crucial for tour guides to perceive that their interactions with travelers facilitate the transformative travel experience. Tour guides are on the front line and their discourse have the power to guide travelers through their transformative experience (Saunders, Weiler, & Laing, 2017). For example, Magee and Gilmore (2015) mention how guides at dark heritage sites such as concentration camps have to adapt their discourse based on whether the travelers have already a deep personal connection with the site or are not as familiar with its history.

Although there is a need to address this gap, one of the principal difficulties in developing a scale to measure transformation in travelers is that transformation encompasses both processes and an outcomes (Cranton & Kasl, 2012; Hoggan, 2015, 2016). The processes began with the travelers being confronted with cultural clashes and experiencing a feeling a disorientation (Walter, 2016). Next, travelers come to the realization that they are unable to use

their past knowledge to overcome this disorientation which lead them to self-reflect about the root cause of the experienced cultural distance (Ross, 2010). This travelers' introspection is centered on how their worldview is shaped by their past experiences, upbringing, cultural norms and social codes (Illeris, 2014; Moyer & Sinclair, 2016; Taylor, 2008). Then, travelers become aware that their perceptions is just one way to look at the world and this awareness triggers outcomes such as being more curious (Walter, 2016), becoming emotionally opens to other way of knowing (Mezirow, 2003), experiencing a shift in identity and sense of self (Baumgartner, 2001; Coghlan & Weiler, 2018; Kirillova et al., 2017c), developing an emotional attachment to the destination and its residents (Reisinger, 2013), understanding more deeply issues related to power dynamic and inequity (Sterchele, 2020; Walter, 2016), desiring to encourage solidity between people (Hoggan, 2016), and warning to be an agent of change in their community . This combination of processes and outcomes prompts Romano (2018) to suggest that a valid and reliable assessment tool for transformative experiences needs to take into account that transformative processes and outcomes go hand in hand.

When reviewing conceptual models for transformative travel experience, an additional interesting question concerns whether steps depicted in the process of transformation can be considered to be the same as dimensions of a construct. To answers this question it is crucial to go back to the purpose of scale development (DeVellis, 1991). When following DeVellis' approach on scale development, one of his recommendations is to identify conceptual models that can help researchers to identify key elements of potential dimensions. This approach aligns with Shoemaker, Tankard Jr, and Lasorsa (2003, p. 110) who define a model as "a process [that] highlights what are considered to be key elements or parts of the process and the connections among them." A common thread of all theoretical models depicting the transformative travel experience is that the transformative steps are conceptually being depicted as akin to dimensions

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(Mezirow, 1991, 2018; Walter, 2016). For example, Walter (2016) conceptualizes transformative travelers as going through a series of five steps which he represents in his model as five dimensions: "concrete experience," "disorienting dilemma," "reflective observation,", "abstract conceptualization", and "active experimentation" (p. 1363). The use of steps as being akin to dimensions is also congruent with other psychological theories that are based on stages of change in individuals (Glanz, Rimer, & Viswanath, 2008; Krebs, Norcross, Nicholson, & Prochaska, 2018).

This approach is also grounded in the recent theoretical models that have emerged in the tourism literature and suggest possible dimensions that can be included in a scale to measure the transformative tourism process (Coghlan & Gooch, 2011; Coghlan & Weiler, 2018; DeCrop et al., 2018) (Table 1). Indeed, having an in-depth understanding of the theoretical models used to examine transformative tourism is crucial to determine the boundaries of this construct (Podsakoff, MacKenzie, & Podsakoff, 2016). For example, Coghlan and Weiler (2018) develop a model in which processes and outcomes are imbricated into four dimensions: 1) content reflection and change, 2) process reflection and change, 3) premise reflection and change, and 4) relational reflection and change. Similarly, DeCrop et al. (2018) create a six dimension model which ties the process itself with social, psychological, and behavioral outcomes. These two models also illustrate the variety of number of dimensions proposed by the transformative tourism framework.

Although there is a consensus that transformative tourism is a multidimensional construct, there is a debate in the literature about the number of dimensions (Cranton & Kasl, 2012; Moyer & Sinclair, 2016). For example, Taylor (1994, p. 162) was one of the first to propose condensing the cumbersome ten steps from Mezirow's model into five dimensions: "setting the stage, cultural disequilibrium, cognitive orientations, behavioral learning strategies,

and evolving intercultural identity." While Coghlan and Gooch (2011) also propose a model which compresses Merzirow's ten steps into four dimensions, they maintain the temporality of the original model in which a disorienting dilemma occurs first, followed by reflection, self-actualization, and reintegration into society.

Table 1. Evolution of the Dimensions of Transformative Tourism

Research articles/books	Number of dimensions	Nature of research	Method	Population
Mezirow (1991)	10	Conceptual/Theory development	Grounded theory field study Qualitative (mail inquiry and on-site observation)	279 institutions offering college re-entry program to women in the United States
Taylor (1994)	5	Theory building	Qualitative	In-depth interview with 12 transformative travelers
Coghlan and Gooch (2011)	4	Theory building	Qualitative	In-depth review of the literature
Walter (2016)	5	Theory building	Qualitative	In-depth review of the literature
Kirillova et al. (2017c)	5	Theory building	Qualitative	In-depth interview with 10 travelers
Robledo and Batle (2017)	3	Theory building	Qualitative	In-depth interview with 9 transformative travelers
Wolf et al. (2017) *	**4**	**Theory building**	**Qualitative**	**In-depth review of the literature**
DeCrop et al. (2018)	6	Theory building	Qualitative	In-depth interview with 20 travelers who engage in Couchsurfing
Coghlan and Weiler (2018)	4	Theory building	Qualitative	In-depth interview with 10 volunteer tourists

Note * The framework by Wolf et al. (2017) is chosen as reference for organizing the key attributes of the transformative travel experience because it is include the most frequently used

dimensions across all models, is taking into account the original theory by Mezirow (1991), and is based on an extensive review of the literature across several fields.

Further, models also demonstrate variations with regard to the scope of the dimensions themselves (Cranton & Kasl, 2012). For example, Walter (2016) takes on a bird's eye view of transformation based on five main dimensions: concrete experience, disorienting dilemma, reflective observation, abstract conceptualization, an active experimentation. However, the model does not include a re-negotiation and adaptation of the travelers in their own culture. Oppositely, the model of Kirillova et al. (2017b) places a strong focus on how the difficult reintegration into the travelers' own culture can lead to a disorienting dilemma which in turn fosters meaning making. Likewise, Robledo and Batle (2017) highlight in their model the importance of the return home. More precisely, they specify that travel can only be noted as transformative if the travelers implement permanent changes to their habits and become active agents of change in their own home community.

Because transformative tourism also occurs in a variety of contexts, the content of the dimensions depicted in the different models vary. For example, Walter's (2016) model focuses on ecotourism and places a strong emphasis on nature, outdoor adventure, and skill development, while by Knollenberg et al. (2014) explore the transformative expectations of volunteer tourists and DeCrop et al. (2018) center their model on the social dimension of Airbnb travelers' transformation Stone, Duerden, Duffy, Hill, and Witesman (2017) transpose the Learning Activities Survey (LAS) from education into the tourism field to determine whether the ten steps of Mezirow's model are present in a study abroad experience. Their survey takes on an innovative approach by combining binary items with an open-ended question in which travelers describe their transformative trip. However, the survey is tested on a small sample composed only of students who participate in study abroad. Strong concerns are also raised by Romano (2018) about the applicability of the LAS scale because clear reports of the validity and

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reliability of the LAS scale are still missing. Another limitation of the LAS scale resides in its binary nature, as Dolnicar, Grün, and Leisch (2011, p. 246) warn that "forced binary measures are logically not suitable for tracking changes in attitudes at the individual level." Because the transformative travel experience is based on the idea that profound changes occur at the individual level it might be better suited to develop a model that offers a broader range in variation in answer format (DeVellis, 2016). A final limitation of the LAS scale is that it does not address the possibility that the disorienting dilemma might occur across different timeframes (Taylor, 1994; Kirillova et al., 2017c).

Each of these studies explore unique facets and pave the way for the development of a Transformative Travel Experience Scale. Although there are notable differences across models, the commonality is that travelers face a disorienting dilemma characterized by heightened emotions, this feeling of disorientation pushes them to engage in self-reflection, and the self-reflection ultimately creates new worldviews (Phillips, 2019). Looking ahead to the procedure of scale development, the conceptual model of Wolf et al. (2017) represents the strongest features to help with defining the conceptual boundaries of the construct interest, identifying key themes and attributes of the travelers transformative experience, and providing a general outline for the creation of items. Wolf et al.'s conceptual model (2017) is particularly strong because it takes into account the latest theoretical development of the transformative theory and it is develop based on an extensive cross-disciplines review of 126 articles focusing on the transformative experience. Under this model, Wolf et al. (2017, 1664) conceptualize the transformative experience of travelers as covering four main dimensions: "1) disorienting dilemma, 2) self-examination, and 3) resolutions, and 4) development of new attitudes and belief." The goal of the present study is to build upon the previous literature to create a Transformative Travel Experience Scale to measure the transformative experience of travelers.

Methodology

Fortunately for the field of tourism research, scale development methodology is well-established (Carpenter, 2018). The present study follows and reinforces the guidelines developed by DeVellis' (2016) eight steps to guide researchers through the process of scale development. DeVellis' approach is specifically selected because it stresses the importance of theory in the development of successful measures. For example, the very first step listed by DeVellis (2016, p. 103) is for researchers to define "what it is you want to measure." Indeed, this step is crucial and lays the foundation for scale development because defining a construct allows researchers to write items that are relevant. In their recommendations for scale development, Worthington and Whittaker (2006, p. 813) warn that "nothing is more difficult to measure than an ill-defined construct because it leads to the inclusion of items that may be only peripherally related to the construct of interest or to the exclusion of items that are important components of the content domain." Poorly defined constructs can also lead to theoretical pollution as researchers use a proliferation of terms to discuss essentially the same thing (Gehlbach & Brinkworth, 2011). Hence theory and methodology go hand in hand because a lack of strong theoretical foundation will inevitability lead to poor scale development.

While DeVellis clearly mentions in his guidelines the importance of defining the construct of interest, he does not provide a step by step approach as how this can be achieved by researchers. There is a clear need to possess guidelines for defining the conceptual boundaries of constructs and avoid both the theoretical and methodological pitfalls brought by the lack of conceptual clarity (Locke, 2012; Podsakoff et al., 2016). Podsakoff et al. (2016, p.169) tackle this issue, reinforce DeVellis' procedure (2016, 69), and clearly label a four stage process to define the conceptual boundaries of a construct**:** 1) "Identify potential attributes by collecting a

representative set of definitions, 2) Organize the potential attributes by theme and identify any

necessary and sufficient or shared ones, 3) Develop a preliminary definition of the concept, and

4) refine the conceptual definition of the concept." (Figure 1). The location, participants,

sampling design, and each of the twelves steps included in Figure 1 are further discussed below.

Figure 1. Step by Step process for scale development based on DeVellis (2016) and Podsakoff et al. (2016)
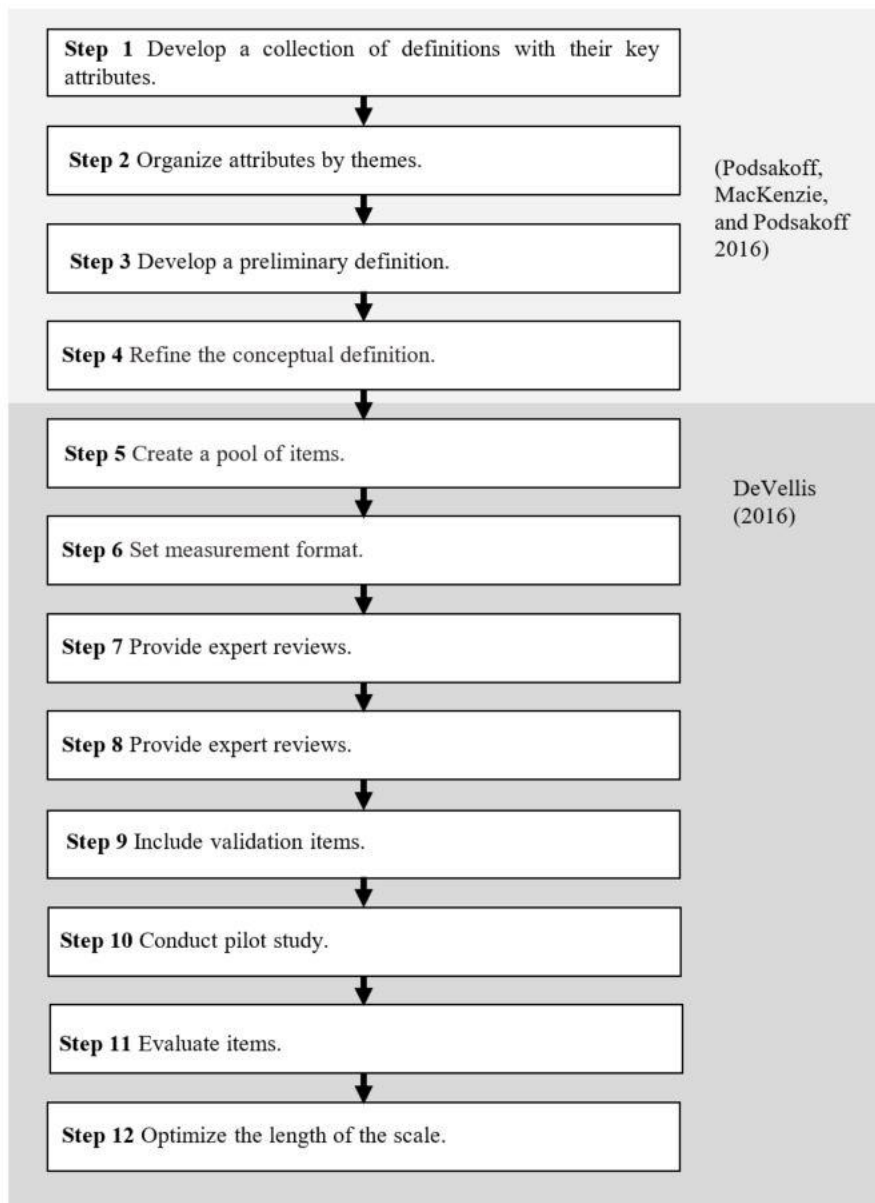
Location, Participants, and Sampling Design

The survey for the Transformative Travel Experience Scale is designed and hosted on Qualtrics. Data collection occurs via Amazon Mechanical Turk (MTurk). The participants are remunerated $.05 for taking the screening questions and an additional $.90 if selected to fill out the scale. Advantages of MTurk include anonymity of the participants and fast data collection. Although there are some criticisms about the professionalization of the survey participants (Paolacci & Chandler, 2014), recent studies have found that the reliability of the results is strong and is not inferior to non-paid participants (Gneezy, 2017).

Because the scale aims at measuring the transformative experience of travelers, three screening questions are included in the survey to ensure that the participants have taken part in transformative tourism. The first screening question addresses the nature of the trip taken by participants. According to the tourism literature, certain types of trips are more conducive to transformation than others (Coghlan & Weiler, 2018; Reisinger, 2013). In her thorough discussion about the nature of transformative travel , Reisinger (2013, p.14) suggests that the following categories are more conductive to transformation: "educational, volunteer, survival, community-based, eco, farm, extreme sports, backpacking, cultural, wellness, religious, spiritual and yoga tourism." In opposition, mass tourism and strictly business related trips are recognized as being less transformative in nature (Reisinger, 2013). These categories provide a basis for the first screening question used in the study which follows a "pick any" format in which travelers are asked to check the category for their self-described transformative trip (e.g., ecotourism, backpacking, pilgrimage, etc.).

A second screening question is included in the survey to avoid capturing travelers who have gone on a trip that qualifies as transformative in nature but who have not experienced a

transformation. This screening question come from Kirillova et al. (2017c, 5) who screen travelers for a transformative study by asking them "Have you ever been on a trip that transformed the way you view the world or led to a life-changing decision?"

Another threat that needed to be addressed is compliancy. Travelers who answer the screening questions might be tempted to say that their trip is transformative simply to please or be helpful the researchers who designed a study. Therefore, a third screening question is added to ask for contextual information about the trip in order to evaluate its transformative power. Following the guidelines of Stone et al. (2017), the following open-ended question is added: "Please, briefly describe your life-changing or transformative trip. Which of the above listed categories of travel did it fall under? Was it domestic or international? What were the primary activities in which you engaged? Why did you find it transformative?" The answers provided are then used during data cleaning to remove participants that did not experience a transformative experience.

For this study, the *p* value is set at p= .05. Israel (1992) recommends a sample size of 400 when a population has a size of >100,000 with a 95% confidence interval, set at *p*=.05, and precision level of plus or minus five. As there is no clear estimation of the size of the market for transformative travelers and to take a conservative approach while keeping the cost of the study in mind, the sample size for the pilot study is set to n=200 (Johanson & Brooks, 2010) while the sample size for the EFA and CFA is set to n=400.

Step 1 Develop a collection of definitions with their key attributes

The objective of this step is to collect definitions of transformative travel in order to identify its key attributes and help to narrow down the conceptual domain covered by the Transformative Travel Experience Scale (Podsakfoff et al., 2016). To explore different facets of the transformation construct, the definition of transformative experiences from the fields of tourism

and education are reviewed in order to identify congruent attributes that could help narrow the

domain of interest. The education field is selected because it is where transformative theory

originates and is on the stage front of fruitful discussions with regard to setting conceptual

boundaries (Hoggan, 2016; Hoggan et al., 2017).

Step 2 Organize attributes by themes

For this phase, Podsakoff et al. (2016) recommend organizing all the attributes by themes based

on a conceptual model (Table 3). As previously described, the conceptual model by Wolf et al.

(2017) is chosen as a reference to organize the attributes. These attributes come from all the

definitions of transformative experience that have been collected as part of step 1. In order to be

organized in their respective themes, those attributes are first identified based on whether they

are *necessary* and *essential* to the understanding construct. Next, attributes are selected based on

whether they are *sufficient* and describe *unique* features of the construct. More precisely, to be

selected, those attributes need to be present in more than one definition and describe a feature of

the transformation that makes it distinctive from other types of learning experiences. The full list

of attributes is listed in Table 2 and are organized using the themes from Wolf et al.'s (2017)

model. Next, the themes and their attributes are used as a guide to determine the conceptual

boundaries of the transformative travel experience and to generate a list of items that fit those

attributes. The full list of items that are created to tap into the construct of transformative travel

experience is also displayed on Table 2.

Table 2. Themes, attributes and generated Items

	Disorienting Dilemma	Self-Examination	Resolution	Development of New Attitudes and Beliefs
A T T R I B I U T E S	-Experiences a disorienting dilemma: a conflict which challenge our perceptions -Triggers heighten and intense emotions -Is extraordinary in nature, powerful, and dramatic -Happens during and after the trip	-Triggers self-reflection -Questions established worldviews, habits, expectations, and cultural assumptions -Involves critical reflection -Reevaluates our frames of reference built during childhood/socialization -Results in critical awareness -Encourage reflectivity	-Experiences more satisfaction -Emotional connection -Taking concrete actions to gain a better understanding of the local culture	-Change way a person understands, makes sense of an interprets the world and their experiences -Change in lifestyle, belief, feelings, abstract thinking, and values -Results in abilities to be more encompassing, tolerant, open, and inclusive - Changes in how a person acts -Becomes an agent of change (includes concrete actions)

ITEMS				
During my trip, I felt… *isolated *lonely ×confused ×out of my comfort zone ×disoriented ×uncomfortable ×out of place ×anxious ×cautious ×critical As a *result of this trip, I felt...* *estranged As a *result of this trip, I am more…* *irritable *frustrated *conflicted *intolerant	This trip made me think about… *the culture of the local residents *my interactions with local residents * how my culture differs from other cultures *my abilities to understand people from a different culture *the way I feel about cultures different from mine *the local residents' point of view *my opinions of local residents *how I react when confronted with cultural differences *my judgement of other cultures *the way I act when I am in a different culture *how my life compares with those of local residents	During my trip, I felt… *excited *joyful *happy *enthusiastic ×peaceful ×thrilled During this trip, I... *learned local customs *watched how residents interact with each other to improve my communication with them *immersed myself into the local culture *engaged in meaningful discussions with local residents *participated in activities with local residents *developed friendships with local residents *posted on social media as a way to record the trip	*As a result of this trip, I am more...* *true to myself *confident *calm *self-confident *patient *independent *mature *wise *humble *independent ×open-minded ×knowledgeable ×empowered ×grateful ×energized ×mindful about ecological issues × concerned about the number of people living in poverty across the world × aware of power imbalances between people of different countries

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I T E M S		×all of the emotions I experienced during my trip ×how my background has influenced the way I see the world ×my values ×the meaning of life	×wrote a diary or journal ×kept a blog ×meditated ×wrote email about my experience ×took photos as record of the trip ×became familiarized with the local history	*As a result of this trip, I...* *gained new perspectives about the destination's local residents *can think more deeply about cultural differences *view my own culture differently *more connected with nature *enjoy the simple things in life more than before the trip ×discovered new things about myself ×have a better understanding of other culture ×emotionally attached to the destination ×hold greater appreciation for what I have ×view my own culture differently *As a result of this trip, I now want to...* * develop friendships with people from different cultures ×be more involved in my community ×work on improving myself ×share my experience experiences with friends and family

Notes:
*Item is selected for the conduct of the EFA
×Item is not selected for the conduct of the EFA

Step 3 Develop a preliminary definition

During step 3, Podsakoff et al. (2016) recommend creating an early draft of the definition. As part of this early draft, the following tentative definition is developed:

Transformative travel experience occur when travelers face a disorienting dilemma, self-reflect on the difficulties they experience as a result of this disorienting dilemma, take actions to implement changes in their behaviors and attitudes, and develop new skills, values, beliefs, habits, and behaviors. These transformative changes are permanent. Once the travelers are back home, they will adapt their lifestyles to reflect the changes experienced during the trip. Thus, transformative tourism is a multidimensional construct.

Step 4 Refine the conceptual definition

During step 4, Podsakoff et al. (2016) recommend reworking the definition, minimizing complex scientific terminology, and reducing ambiguity. The previous definition of transformative travel is refined and now states:

Based on the transformative theory, the transformative travel experience occurs when travelers are permanently changed and improved by their travel experience. Before reaching transformation, travelers are faced with something that disrupts their values and causes them to experience intense emotions. This disrupting event is called a disorienting dilemma. In order to overcome their initial shock, travelers need to reflect on how their own upbringing and culture have influenced the way they see the world. As a result of this reflectivity, travelers gain broader understanding of the world, values, and beliefs. They are permanently changed by this process and they implement concrete changes in their lifestyle.

Step 5 Create a pool of items

During step 5, the conceptual definition is used to create a pool of items that are theoretically congruent with the construct of transformative tourism. A total of 78 items are generated to

comprehensively cover all possible facets of transformative travel. Characteristics of good items include reasonable length, acceptable degree of reading difficulty (sixth grade reading level), using nouns instead of adjectives in the items' wording, and avoiding double-barreled phrasing (DeVellis, 2016).

Step 6 Set measurement format

Once the initial pool of items is developed, the next step is to select the format of measurement for the Transformative Travel Experience Scale (DeVellis, 2016). When selecting this format, it is crucial to keep in mind that more variability in the measurement scale is beneficial because it allows researchers to capture more subtle differences in the participants' perception of the latent variable (DeVellis, 2016). The format of measurement is set to a seven-point Likert scale format. This format is selected because it is congruent with previous measurements of individual changes in attitude and offers variation across answers (Dolnicar, Grün & Leisch, 2011; Kirillova, 2017a).

Step 7 Provide expert reviews

After the format is set, the next step is to have a group of practitioners who specialize in transformative travel review the list of items as well as the developed definition for the Transformative Travel Experience Scale. In the present study, these experts (n=12) are part of a contact list developed during a previous study on transformative travel. This contact list is composed of Executive Directors and Program Managers whose contact information was found by searching for transformative tourism organizations on the following public portals: The Transformative Tourism Council, GoAbroad.com, and the Adventure Travel and Trade Association. The evaluation of items follow the method described by Zaichkowsky (1985) in which these practitioners are asked to categorized each item of the scale as either "completely

representative, somewhat representative or not representative'' of the latent construct of transformative travel.

Once this online questionnaire is completed by experts, they are invited to conduct a follow up phone interview. A total of seven practitioners agree to be part of the next phase of the study to be interviewed. Conducting seven phone interviews is a number that is consistent with past studies on scale development (Dean, 1961; Sikich & Lerman, 2004). The quality rather than the quantity of feedback is sought in order to gain deeper insights into how the Transformative Travel Experience Scale can be improved. These interviews were not audio recorded but notes were taken about their recommendations. Each interview lasted on average 10 minutes and covered the following questions: "Were there any items with a problematic wording? Would some of the items need to be more concise? Which items would you drop and why? Would you have recommendations about other items which would be useful for transformative travel practitioners?"

During the phone interviews, the transformative travel practitioners share some important points to be addressed. For example, one practitioner recommends adding an item measuring excitement during the trip because she witnesses transformative travelers' excitement as they are immersing themselves into a new culture. Another interviewee recommends dropping the first five items "I experienced cultural shock", "strong emotions", "physical shock", "poverty shock" and "cultural shock" because they are redundant. This interviewee judiciously points out that we are already asking travelers whether they felt disoriented, isolated, and lost during their trip and that those emotions are describing the shock experience itself. The revised pool of items is now composed of 82 items and listed in Table 2.

Step 8 Include validation items

After the experts share their recommendations, the following step is to include validation items in order to detect response bias (DeVellis, 2016). In an article focusing on responses bias, Meade and Craig (2012, p. 452) suggest detecting response bias by using instructed response items. More precisely, they suggest adding one instructed response item for "every 50–100 items" with "up to a maximum of three" instructed response items for a whole scale. Thus, three instructed response items are included in the survey. Those items ask respondents to "Please check [neutral/strongly agree/strongly disagree] for this question." Lastly, Meade and Craig (2012) recommend to openly ask participants if their responses should be used for analysis. Based on this recommendation, a question at the end of the survey asks participants: "In your honest opinion, should we use your data in our analyses in the study?" Further, several actions are taken to mitigate common method bias following the recommendations outlined by Podsakoff, MacKenzie, and Podsakoff (2012) and Podsakoff, MacKenzie, Lee, and Podsakoff (2003). The items are carefully reviewed to make sure that they are not ambiguous to respondents by ensuring that there are not constructed based on double-negative, difficult syntax, and complex vocabulary. The items are also checked to ensure that they are clear and succinct. For example, item Q2_11 is reworded by adding the word *local* to ensure participants understand that it is referring to destination residents (i.e., This trip made me think about the culture of local residents). The online questionnaire itself is also specifically designed with the goal of minimizing common method bias. For example, every point on response scale is clearly numbered and labelled so that participants do not have to scroll up or down to the top of the list of items see the labels. The order of the items on the online survey is not randomized as Podsakoff et al. (2003, p 88) suggest "it may disrupt the logical flow and make it impossible to

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use the funneling procedure (progressing logically from general to specific questions) often recommended in the survey research literature."

Another way to control for common method bias is that participants are introduced to the online survey in a manner that reduce apprehension and social desirability (Podsakoff et al., 2003). The guidelines of the survey clearly indicate that "We are interested in understanding the full range of emotions felt by travelers during a life-changing trip". Another way that social desirability is addressed is by altering items that deals with positive and negative emotions. For example, participants are asked if "during this trip I felt… joyful", followed by "confused", then "happy", and so on. Preserving the participants' anonymity is an additional way to reduce common method bias (Podsakoff et al., 2003). Anonymity is preserved by having participants filling the survey online and not collecting any personal identifier from them. The online set-up of the questionnaire remains the same for each of the three data sets collected for the study (i.e., pilot study, EFA, and CFA).

Step 9 Conduct pilot study, step 10 evaluate items, and step 11 optimize the length of the scale

The pilot study for the Transformative Travel Experience Scale is conducted on MTurk and follows the previously detailed screening process. A total of 467 travelers took part in the pilot study; 273 passed the three screening questions. Prior to conducting the EFA analysis the data is thoroughly cleaned and is checked for careless respondents. One advantage of using MTurk is that participants receive the code that will allow them to be paid only at the end of survey. As a result, the data set does not have any missing data. However, decisions still need to be made with regard to outliers and careless respondents. Participants that are outliers are identified by looking at whether the mahalonobis distance of their scores is too far away from the centroid (Daszykowski, Kaczmarek, Vander Heyden, & Walczak, 2007). Careless participants are identified based on whether they take too little time to complete the survey and they do not

correctly fill one the three instructed response item (e.g.; "please check strongly agree") (Meade & Craig, 2012). After data cleaning, the number of useable responses is 242.

With regard to the gender composition of this sample of 242 travelers, 123 are women and 116 are men. As to age, the largest categories consist of travelers from 21 to 30 years (n=108) old, followed by 31 to 40 (n=71), 41- 50 (n=28), more than 60 (n=10), and 18-20 (n=7).The majority of the travelers have taken 1-4 international trips (n=212), followed by 5-10 international trips (n=68), only domestic trips (n=28), 16 or more international trips (n=13), and 11-15 international trips (n=12).

The items are first evaluated by looking at the corrected item-total correlation during step 10. Items with higher values are perceived to be more desirable (DeVellis, 2016). Next, the item variance is observed with items that have higher variance being marked are more desirable (DeVellis, 2016). The following evaluation includes looking at the mean of each item. In the present scale, items that have a mean located closer to 4 are more desirable. At this stage, none of the items are deleted but are simply flagged as potentially worrisome. The objective is to gather evidences before step 11 in order to make an informed decision.

After conducting the pilot study and evaluating the items, the goal of step 11 is to optimize the Transformative Travel Experience Scale by dropping low performing items. This optimization occurs by running an early EFA in order to see how the 76 items are performing (Carpenter, 2018). A parallel analysis is run using principal axis factoring which suggests that a seven factor solution is explaining 47% of the variance with an overall alpha of .95 and loadings above .40. Although, Schwab (1980) recommends a ratio of 10 participants per item as a rule of thumb, recent findings suggest that the sample size can be lower than the 10:1 ratio (Boateng et al., 2018; Morgado et al., 2018; Nagy, Blair, & Lohrke, 2014). For example, Boateng et al. (2018) suggest that a sample size of 200 can be considered as fair. Further, Nagy, Blair, and

Lohrke (2014) elaborate on the pioneering work of Barrett and Kline (1981, p. 291-292) and explain that " when the reliability of exploratory factor analysis results obtained from one dataset randomly split into two subsamples with observations-to-variables ratios of 1.25:1 and 31:1 …the difference in ratios was not a significant contributor to factor stability." When addressing specifically the conduct of an EFA, Hinkin (1998) mentions that a sample size of 150 is acceptable. Similarly, Guadagnoli and Velicer (1988) suggest that the results of an EFA can be interpreted with confidence even with a sample size below 150 as long as 1) the scale is composed of four or more factors and 2) the factor loadings are above .40 which it the case for the present findings in the pilot study.

We examine the output of the EFA by looking at the factor loadings of items, the communality scores, and the Cronbach alpha of each dimension. The scale is optimized by dropping items with factor loading below .50, have complexity score above 2, and have communality score below .32 (Field, Miles, & Field, 2012; Osborne, Costello, & Kellow, 2008; Pettersson & Turkheimer, 2010; Ullman, Tabachnick, & Fidell, 2001). Based on this decision, the scale is reduced from 82 to 44 items. Those 44 items are marked in Table 2 by way of an asterisk.

Results

Data cleaning and Descriptive Statistics

Before launching the EFA and CFA analyses, each individual data set is thoroughly cleaned following the same procedure as described in the pilot study section of checking for outliers, missing data, and careless respondents. The data were collected on December 5, 2018, for the EFA and on January 02, 2019, for the CFA. The data set for the EFA consists of 498 travelers, reduced to 402 usable answers after data cleaning. Descriptive statistics indicate that the biggest age categories regroups travelers from 31-40 (n=133), followed by 41-50 (n=71), 51-

60 (n=41), more than 60 (n=15), and 18-20 (n=13). Concerning gender, this data set includes 220 travelers who identified as female, 173 as male, 2 as transgender, and 7 travelers who prefer not to say or choose the category labelled as other. The majority of the travelers have taken 1-4 international trips (n=211), followed by 5-10 international trips (n=100), 16 or more international trips (n=48), only domestic trips (n=23), and 11-15 international trips (n=20).

Regarding the data set used in the CFA, a total of 459 respondents resulted in 400 usable answers. Descriptive statistics are run to better understand the composition of the data set. The majority of travelers belong to the 21-30 age group (n=156), followed by the 31-40 (n=152), 41-50 (n=49), 51-60 (n=25), more than 60 (n=12), and 18-20 (n=6). With regard to gender, 200 of the travelers identified as female, 199 as male, and 1 as transgender. The largest category of travelers have taken 1-4 international trips (n=229), followed by 5-10 international trips (n=93), only domestic trips (n=37), 16 or more international trips (n=29), and 11-15 international trips (n=12).

Descriptive statistics for both groups are illustrated in Figure 2.

Figure 2. Descriptive statistics for the EFA sample and CFA sample

Gender

Number of international trip(s) taken
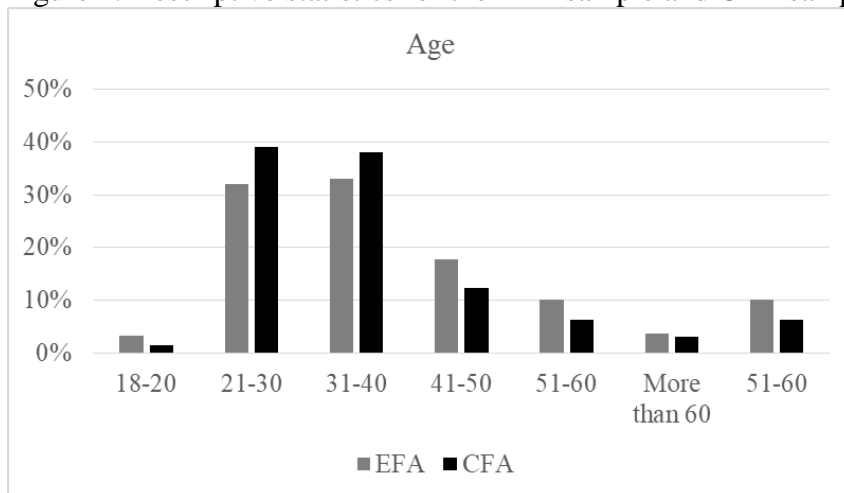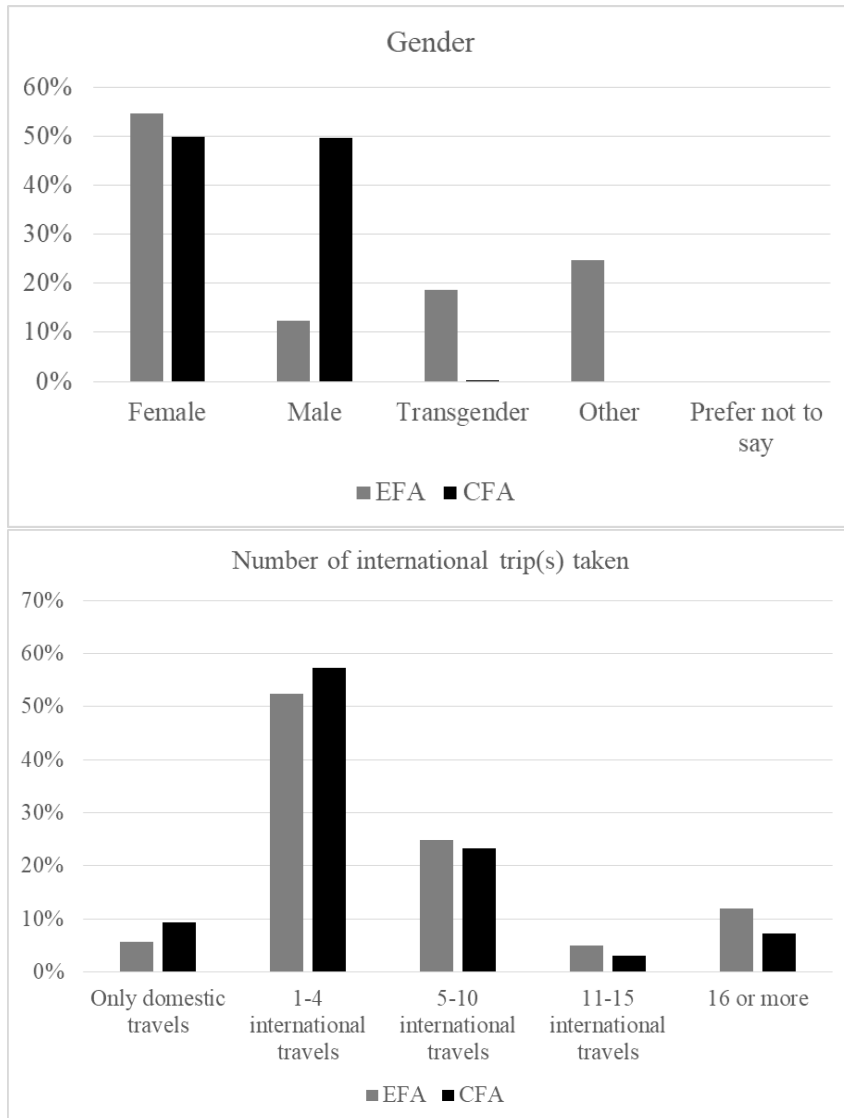
Exploratory Factor Analysis (EFA)

The next step is to determine if the data set is fit for use in an EFA (Williams, Onsman, &

Brown, 2010) using the Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy (Field et al.,

2012). The overall measure of adequacy for this sample is .93 which qualifies as superb

(Hutcheson & Sofroniou, 1999). Further, all individual listed items have a measure of sample

adequacy that is above .50. When interpreted together, these measures suggest that the sample

size is adequate for the conduct of an EFA analysis (Williams et al., 2010). A Bartlett's test is

also conducted as a complementary analysis. The result of the Bartlett's test for this sample is

highly significant, $\chi^2(1,378) = 13,699$, $p<.001$ which as well suggests that the data is appropriate for the conduction of an EFA (Field et al., 2012).

For this study, a common factor analysis approach is chosen over the principal component analysis approach to conduct the EFA (Finch & French, 2015; Warner, 2008). Although both approaches often lead to similar results, they rely on different conceptual and mathematical assumptions (Field et al., 2012). In their guidelines on scale development, Finch and French (2015, p.33) mention that a limitation of the principal component analysis is that it assumes that "the indicators are measured without error (i.e. they have perfect reliability)." In other words, the principal component analysis essentially pretends that researchers can predict all of the variance in each item from the rest of the items. This assumption of perfect reliability is untenable because it is unlikely that a scale is able to capture the totality of the variance (Fabrigar, Wegener, MacCallum, & Strahan, 1999).

Oppositely, the common factor analysis recognizes that a measure cannot capture the totality of the variance (Finch & French, 2015). This approach suggests that the variance comes from different sources: common variance (i.e., the variance that is shared between an item and other items), unique variance (i.e., the variance that is purely captured by one factor in the scale and does not overlap with other factors present in the scale), and error variance (i.e., variance due to the measurement process) (Beavers et al., 2013; Carpenter, 2018).

While principal component analysis is a sound approach for data reduction, Finch and French (2015, p.33) state that a common factor analysis is a better approach if a researcher also wants to "identify a latent structure that is directly tied to theory." This is a crucial point because DeVellis' guidelines give a central place to theory in the scale development process. Thus, the use of common factor analysis makes more sense from both mathematical and theoretical points of view (Carpenter, 2018).

Following the common factor analysis approach, the parallel analysis is conducted using principal axis factoring (PA-PAF) (Crawford et al., 2010). The PA-PAF is conducted via the *psych* package in R. An initial PA-PAF is conducted and provides a scree plot to visualize how many factors need to be extracted. The number of factors to be retained is determined by a combination of finding the point of inflection in the scree plot and selecting a solution whose eigenvalues are above one (Finch & French, 2015). This analysis and its interpretation suggest that four factor solution is the preferred option for the Transformative Travel Experience Scale.

Table 3. Results from the Exploratory Factor Analysis

Factors/Items	Factor Loading	Mean	SD
Factor 1: Local Resident and Cultural Assessment (α=.94, ω=.96, ω^h=.86)			
Q2_11 *This trip made me think about*…the culture of the local residents	.95	5.80	1.23
Q2_3 *This trip made me think about*…my interactions with local residents	.88	5.63	1.37
Q2_8 *This trip made me think about*…how my culture differs from other cultures	.87	5.86	1.40
Q2_4 *This trip made me think about*…my abilities to understand people from a different culture	.87	5.77	1.38
Q2_6 *This trip made me think about*…the way I feel about cultures different from mine	.85	5.67	1.43
Q2_2 *This trip made me think about*…the local residents' point of view	.84	5.59	1.39
Q2_1 *This trip made me think about*…my opinions of local residents	.83	5.54	1.41
Q2_9 *This trip made me think about*…how I react when confronted with cultural differences	.80	5.44	1.39
Q2_15 *This trip made me think about*… my judgement of other cultures (X)	.78	5.44	1.48
Q7_2 *As a result of this trip, I*…gained new perspectives about the destination's local residents	.77	5.91	1.21
Q2_5 *This trip made me think about*… the way I act when I am in a different culture (X)	.76	5.65	1.47
Q7_4 *As a result of this trip, I*... can think more deeply about cultural differences (X)	.72	5.48	1.27
Q4_3 *During this trip, I*... learned local customs (X)	.72	5.36	1.32
Q5_1 *As a result of this trip, I now want to*... develop friendships with people from different cultures (X)	.71	5.56	1.34
Q3_5 *During this trip, I*... watched how residents interact with each other to improve my communication with them (X)	.67	4.99	1.60
Q2_14 *This trip made me think about*… how my life compares with those of local residents (X)	.66	5.83	1.38
Q4_1 *During this trip, I*... immersed myself into the local culture (X)	.61	5.57	1.34
Q3_2 *During this trip, I*... engaged in meaningful discussions with local residents (X)	.56	4.71	1.46
Q6_2 *As a result of this trip, I* ... view my own culture differently (X)	.56	5.45	1.45
Q3_3 *During this trip, I*... participated in activities with local residents (X)	.54	4.72	1.51
Q4_1 *During this trip, I*... developed friendships with local residents (X)	.53	4.96	1.68
Factor 2: Self-Assurance (α=.82, ω=.88, ω^h=.72)			
Q8_10 *As a result of this trip, I am more*...true to myself	.91	5.63	1.07
Q8_11 *As a result of this trip, I am more*...confident	.74	5.62	1.08
Q8_20 *As a result of this trip, I am more*...calm	.71	5.16	1.27
Q8_17 *As a result of this trip, I am more*...self-confident	.68	5.45	1.19
Q8_5 *As a result of this trip, I am more*...patient	.63	5.14	1.37
Q8_1 *As a result of this trip, I am more*... independent (X)	.59	5.53	1.29
Q8_7 *As a result of this trip, I am more*... mature (X)	.55	5.69	1.12

Q7_7 *As a result of this trip, I am more*... connected with nature (X)	.50	5.09	1.63
Q8_19 *As a result of this trip, I am more*... wise (X)	.48	5.27	1.15
Q7_1 *As a result of this trip, I*... enjoy the simple things in life more than before the trip (X)	.43	5.92	1.12
Q8_16 *As a result of this trip, I am more*...humble (X)	.35	5.55	1.26
Q3_1 *During this trip, I*... posted on social media as a way to record the trip (X)	.29	5.57	1.26

Factor 3: Disorienting Dilemma (α=.81,ω=.87,ω^h=.77)

Q8_9 As a *result of this trip, I felt*... estranged	.71	5.79	1.39
Q8_12 As a *result of this trip, I am more*... irritable	.71	6.17	1.07
Q8_15 As a *result of this trip, I am more*... frustrated	.67	5.87	1.36
Q8_3 As a *result of this trip, I am more*... conflicted	.66	5.24	1.57
Q1_8 *During my trip, I felt*... isolated	.59	4.92	1.81
Q1_6. *During my trip, I felt*... lonely (X)	.52	5.35	1.67
Q8_6 As a *result of this trip, I am more*... intolerant	.52	6.12	1.22

Factor 4: Joy (α=.85,ω=.90,ω^h=.78)

Q1_9 *During my trip, I felt*... excited	.81	.92	6.31
Q1_1 *During my trip, I felt*... joyful	.77	.85	6.31
Q1_3 *During my trip, I felt*... happy	.73	.86	.91
Q1_4 *During my trip, I felt*... enthusiastic	.65	6.27	6.19

Note: (X) means that the item is dropped from the scale

Next, another PA-PAF is run with a promax rotation (oblique) that specifies a four factor

solution (Table 3). We examine each of the four factors and their respective items by looking at

their factor loadings, communality, complexity, and uniqueness scores in the output of the EFA.

These four factors (46 items) explain 47% of the variance and are named cultural assessment,

self-assurance, disorienting dilemma and joy. The factor of local residents and cultural

assessment comprises both processes and an outcome which is congruent with other scales that

are capturing stages of change in individuals (Glanz et al., 2008; Jorgenson et al., 2019; Krebs et

al., 2018) and previous scales that are attempting to capture the transformative travel experience

(Stone et al., 2017).The factor of local residents and cultural assessment can be described as

regrouping items in which transformative travelers are assessing their abilities to interact with

local residents and understand other cultures and worldviews. This factor echoes the findings of

DeCrop et al. (2018) who observe that transformative travelers are engaged in an assessment of

local residents and what it means to them to be a global citizen and to be open to the world.

Similarly, Kirillova et al. (2017c) mention that by being immersed in a new culture the travelers

can re-evaluate the meaning of their own existence and apply important changes to their own

lifestyle. Thus for a transformation to occur, it is crucial that travelers actively think about their

ability to interact with people from different cultures, see the world through different lenses, as

well as value and respect differences in worldviews (Robledo & Batle, 2017).

Next, the factor of self-assurance captures the feeling of self-growth and empowerment

that is expressed by transformative travelers. This factor is similar to the testimonies of women

solo-travelers, collected by Laing and Frost (2017), who express an increased feeling of

autonomy and mastery as a result of their transformative travel experience. The feeling of self-

confidence and assurance is also mentioned as an outcome by Wolf et al. (2017). Further, the

desire of being true to self is mentioned by Kirillova et al (2017bc) as crucial to the transformative experience.

The disorienting dilemma factor captures the reverse culture shock that is experienced by the transformative travelers after their return home. This factor supports Kirillova et al.'s (2017c) expansion of transformative theory which states that the most powerful part of the disorienting dilemma occurs when the travelers are back home and are experiencing difficulties re-integrating into their previous life. Upon their return home, travelers are suddenly being confronted with their old life which seems out of touch with what they have experienced during their trip (Robledo & Batle, 2017). Travelers can feel like their previous life is inauthentic and can express frustration toward what they perceive as excessive consumerism and materialism (Kirillova, Lehto, & Cai, 2017c; McGehee & Santos, 2005). As described by Coghlan and Gooch (2011, p.721) the disorienting dilemma includes "periods of negative emotions, such as frustration, irritation, discontent, worry and tenseness." Those emotions are the ones that are captured by the factor of disorienting dilemma.

The last factor is joy which captures the elation felt by travelers as they are immersed at the destination. This factor of joy also supports the findings of Laing and Frost (2017) who suggest that positive emotions while at the destination are an important part of the transformative travelers' narrative. Further, this factor recalls the concept of "re-enchantment" of DeCrop et al. (2018) who describe how transformative travelers express joy when they feel connected with local residents and are experiencing the thrill of discovering a new culture. Similarly, Bos, McCabe, and Johnson (2015) suggest that joy arises from being focused on the travel experience itself and being removed from daily preoccupations and burdens while at the destination.

While the nature of the factors is largely congruent with findings from the transformative travel literature, several measures of reliability are also used to grasp the internal consistency of

the Transformative Travel Experience Scale (Revelle & Condon, 2018). Cronbach's alphas for the four factors range between .81 and .94, which is above the recommended threshold of .70 (Field, Miles & Field, 2012). The Omega values for the four factors range between .96 and .87 which are also above the recommended .70 threshold (Watkins Allen, Coopman, Hart, & Walker, 2007). The last reliability measure is Omega Hierarchical whose values range between .72 to .86 and are well above the minimum threshold of .50 (Watkins Allen et al., 2007).

Once the reliability is assessed, a decision must be made with regard to optimizing the length of the Transformative Travel Experience Scale (Carpenter, 2018). Several items are deleted based on the objectives of enhancing the reliability of the scale and possessing an optimal number of items per factor (Carpenter, 2018). The decision is made to delete items either because they have factor loadings that are below .50 (e.g., Q3_1 and Q8_19) and/or they have complexity score close to 2 (e.g., Q2_3 and Q7_1), and have communality score below .32 (Q1_6 and Q8_7) (Field et al., 2012; Osborne et al., 2008; Pettersson & Turkheimer, 2010; Ullman et al., 2001). The objective is to favor items that have high factor loadings and communality scores. Next, modification indices are used to select an optimal number of items per factor (Yoo & Donthu, 2001). Large modification indices suggest that items are cross loading and that there is error covariance (e.g., Q2_15 and Q1_6). Those items can be dropped to improve model fit significantly, reducing the scale from 46 to 24 items which are retained for the next step of the CFA analysis.

Confirmatory Factor Analysis (CFA)

Before starting the confirmatory factor analysis (CFA) on the 24 retained items, a Madria's test is conducted to test whether the data respect the assumption of normality (Finch & French, 2015). The Q-Q Plot generated by this test suggests that there is a departure from normality because the actual data do not fully fall along the solid line (Finch & French, 2015). These

findings are also consistent with the descriptive statistics that indicate a moderately non-normal data set with skew <2 and kurtosis <7 (Finney & DiStefano, 2006).

To adjust for non-normality, a WLSMV estimator is used when running a Full Information Maximum Likelihood model (Finney & DiStefano, 2006). The analysis is conducted using the *Lavaan* package in R. The model demonstrates a good fit with χ^2=279.79, *df*=246, and a *p*-value= .068. In addition, CFI= .994, TLI=.993, RMSEA=.019, and SRMR=.054. The Cronbach's alpha of each factor suggests an acceptable level of reliability with values ranging from .85 to .93 which is above the recommended threshold of .70 (Nunnally, 1978) (Table 4). Similarly, the Omega values range from .86 to .93 which are also above the recommended .70 threshold (Watkins Allen et al., 2007). The Omega hierarchical values are also acceptable and range between .72 to .86 , well above the minimum threshold of .50 (Watkins Allen et al., 2007). A last indicator of reliability are the CR values which are above .70 and suggest acceptable internal consistency (Fornell-Larcker, 1981). The 24-item Transformative Travel Experience Scale explains 61% of the variance, compared to 47% for the larger number of items, with Local Residents and Cultural Assessment explaining the largest portion of the variance (23%) followed by Self-Assurance (15%), Disorienting Dilemma (12%), and Joy (12%).

Table 4. Results from the Confirmatory Analysis

Factors/Items	Factor Loading	Mean	SD	CI	AVE
Factor 1: Local Residents and Cultural Assessment (α=.93, ω=.95, *ω^h*=.82)				.93	.60
	.83	5.74	1.37		
1. *This trip made me think about*…my abilities to understand people from a different culture	.81	5.70	1.37		
2. *This trip made me think about*…the culture of the local residents	.76	5.71	1.25		
3. *This trip made me think about*…my interactions with local residents	.83	5.70	1.40		
4. *This trip made me think about*…the way I feel about cultures different from mine	.70	5.59	1.37		
5. *This trip made me think about*…my opinions of local residents	.73	5.64	1.37		
6. *This trip made me think about*…the local residents' point of view	.77	5.70	1.43		
7. *This trip made me think about*…how my culture differs from other cultures	.74	5.70	1.25		
8. *As a result of this trip, I...*gained new perspectives about the destination's local residents	.76	5.75	1.43		
9. *This trip made me think about*…how I react when confronted with cultural differences		5.42	1.43		
Factor 2: Self-Assurance (α=.85, ω=.87, *ω^h*=.80)				.86	.55
1. *As a result of this trip, I am more...*true to myself	.77	5.58	1.24		
2. *As a result of this trip, I am more...*confident	.82	5.60	1.25		
3. *As a result of this trip, I am more...*calm	.67	5.33	1.34		
4. *As a result of this trip, I am more...*self-confident	.81	5.53	1.25		
5. *As a result of this trip, I am more...*patient	.61	5.46	1.24		
Factor 3: Disorienting Dilemma (α=.90, ω=.91, *ω^h*=.87)				.90	.60
1. *As a result of this trip, I felt...* estranged	.77	4.98	1.93		
2. *As a result of this trip, I am more...* intolerant	.75	5.34	1.83		
3. *As a result of this trip, I am more...* irritable	.79	5.59	1.73		
4. *As a result of this trip, I am more...* frustrated	.85	5.15	1.93		
5. *As a result of this trip, I am more...* conflicted	.78	4.59	1.98		
6. *During my trip, I felt...* isolated	.71	4.68	1.95		
Factor 4: Joy (α=.90, ω=.92, *ω^h*=.84)				.90	.69
1. *During my trip, I felt...* excited	.79	6.00	1.29		
2. *During my trip, I felt...* joyful	.87	5.99	1.26		
3. *During my trip, I felt...* enthusiastic	.86	6.02	1.18		
4. *During my trip, I felt...* happy	.80	6.03	1.20		

Convergent, Discriminant, Nomological, and Predictive Validity

The convergent validity is assessed by looking at whether the AVEs are above .50 (Fornell &

Larcker, 1981). All factors of the Transformative Travel Experience Scale have AVEs that are

above this recommended threshold, suggesting that this scale has good convergent validity. The

discriminant validity is tested by looking at whether the AVE values are higher than the squared

correlation between the four dimensions (Farrell & Rudd, 2009). As seen in Table 5, all of the

AVE values located on the diagonal are higher than their respective set of squared correlations which suggest good discriminant validity.

Table 5. Convergent and Discriminant Validity

Factors	1	2	3	4
1. Local Residents and Cultural Assessment (LRCA)	*.596*	.025	.002	.055
2. Self-Assurance (SA)	.141	*.503*	.016	.102
3. Disorienting Dilemma (DD)	-.044	.136	*.598*	.055
4. Joy (J)	.234	.340	.236	*.693*

Note: AVEs are located in the italicized diagonal, squared correlations are in the top half of the matrix, and correlations are in lower half of the matrix.

Nomological validity is tested by looking at the extent two constructs are related (Wang & Netemeyer, 2004). Nomological validity answers the question of whether a measure is related to a network of other variables and constructs in expected and observable ways. To test nomological validity, researchers usually look for a scale that is measuring a construct that is conceptually different but should be theoretically related to some extent to the scale that they are currently developing (Borsboom, Mellenbergh, & van Heerden, 2004). Those constructs can be further described as being part of a nomological network which connect together *cousin* concepts (Podsakoff et al, 2016). Both constructs should behave in a manner that is expected and described in the literature.

In the present study, the concept of empathy is chosen to test nomological validity because the tourism literature suggests conceptual connections between empathy and alternative forms of tourism such as transformative travel (Tucker, 2016). Empathy is defined as "a set of constructs having to do with the responses of one individual to the experiences of another" (Davis 2018, p.12). In an article on empathy and travel, Tucker (2016) further explains that possessing a strong level of empathy is crucial for travelers ability to look at someone else's point of view, engage in meaningful cross-cultural dialogue, and reach new understanding. This

view is echoed by Taylor and Cranton (2013, p.38) who suggest that "a major outcome of a perspective transformation involves an increase in empathy towards others." More recently, (Phillips, 2019) found that transformative travel results in enhanced empathy through in-depth interviews with independent long-term travelers.

Based on the literature, we postulate that the correlations between empathy and the Transformative Travel Experience Scale will be positive but will not be strong. If it was the case, this would mean the two measures are essentially capturing the same thing, that the newly developed scale does not bring anything new to the nomological network, and this new scale is simply a reiteration of what is already present in the literature (Podsakoff et al., 2016). Thus, it is expected that the two measures will correlate somehow but the correlation will not be too strong. The scale that is used to measure empathy comes from Laible, Carlo, and Roesch (2004) is based on the work of Davis (1980), and is composed of 14 items. The correlation analysis suggests that there are positive correlations between empathy and local residents and cultural assessment (r=.33, p = < .001), empathy and self-assurance (r=.39, p = < .001), empathy and disorienting dilemma (r=.39, p = < .001), as well as empathy and joy (r=.29, p = < .001) suggesting an overall good nomological validity.

Lastly, predictive validity is assessed by investigating whether scores on the Transformative Travel Experience Scale can predict scores on the empathy scale. A simple linear regression is conducted and suggests that the Transformative Travel Experience Scale is a predictor of empathy ($F_{(1,400)}$ =42.43, $p<$.001). This model explains 10% of the variance in empathy. The model also has an overall good fit ($\chi^2_{(655)} = 1223.22; p < .001, \chi^2/df = 1.86; RMSEA = .047; SMRM = .074; CFI = .95;$ and $TLI = .95$). Additionally, all of the items included in the model have high and significant loadings (p<.001) on their designated factor.

This suggests that an increase in empathy might be one of the outcome variables of the transformative experience.

Conclusion and Discussion

Building on the work of Kirillova and al. (2017c), this study aims to develop a Transformative Travel Experience Scale. As with any study, there are methodological, theoretical and practical applications, limitations, and contributions for future research.

Methodologically, the findings suggest that what sets transformative travel apart is its focus on a combination of intense emotions such as the ones captured by the factors of joy and disorientating dilemma. One of the main findings of the study concerns the emotions felt by transformative travelers. The importance of positive emotions is highlighted by interviewed practitioners and experts during the early steps of scale development which is in direct response to critiques of Mezirow (1991), Dix (2016) and Merriam (2008). The present study also expands the current understanding by surveying a broader and larger population of travelers than the significant but population-specific work by DeCrop et al. (2018) and Walter (2016). The analysis of the Transformative Travel Experience Scale also reveals the importance of the positive factor of joy, supporting the argument that positive emotions are indeed an intrinsic part of the transformative experience of travelers during their stay at the destination. This finding supports the recent theoretical expansion of transformative theory which gives more importance to the role of positive emotions (Dix, 2016; Hoggan et al., 2017).

The findings also expand the current theoretical debate with regard to the disorienting dilemma. The study suggests that the disorienting dilemma might occur at different points in time. This contradicts the work of Wolf et al. (2017) and Coghlan and Gooch (2011), who situate the disorienting dilemma as the first step of the transformative experience of travelers, but is more aligned with the more recent, comprehensive and less sequential conceptual model where

the disorienting dilemma can occur later in time (Coghlan & Weiler, 2018; DeCrop et al, 2018; Kirillova et al, 2017c; Robledo & Battle, 2017). This study finds that transformative travelers encounter a light version of the disorienting dilemma while at the destination, typically when they report feeling isolated, and then can face a stronger disorienting dilemma after their return home. When developing the Transformative Travel Experience Scale, isolation is the only one of the eight items measuring the disorienting dilemma during the trip which loads highly during exploratory factor analysis. This suggests that feeling isolated acts as a seed, in that isolated travelers start to question their ability to connect with others while at the destination. Further, an important discovery is that the more powerful aspect of the disorienting dilemma seems to occur later in time, once the travelers have returned home. The majority of the loading items on the factor of disorienting dilemma occur after their trip, which is in line with the findings from Kirillova et al. (2017c). This finding is also consistent with other research highlighting that travelers experience irritation toward materialism and consumerism after their trip and can even feel alienated from their own culture and previous circle of friends after their return home (Kirillova et al., 2015; McGehee & Santos, 2005; Noy, 2004).

The study also has theoretical implications with regard to the conceptual representation of the transformative experience of travelers. In the literature, the transformative experience of travelers is conceptualized in a variety of ways ranging from as little as three dimensions (Robledo & Batle, 2017) to as many as ten in the original model designed by Mezirow (1991). The study provides empirical support for the work of Coghlan and Gooch (2011), Coghlan and Weiler (2018), and Wolf and al. (2017), who suggest that Mezirow's original ten step model (1991) could be effectively condensed into four more manageable dimensions. The increased functionality of a four factor Transformative Travel Experience Scale offers numerous concrete applications for travel practitioners.

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This study has beneficial and practical significance for travel practitioners with regard to program design, staff training, and impact reports. Having a reliable and valid scale to measure transformation is crucial to improve program design for transformative travel experiences (Walter, 2016). The Transformative Travel Experience Scale can be useful to program managers by allowing them to better measure the impacts of different activities/attractions on the travelers' transformation. Employees on the ground can also use the Transformative Travel Experience Scale to quickly assess how activities like group discussions, theatre exercises, art-based activities, and games are influencing the transformative experience of travelers. This supports the work of Soulard, McGehee, and Stern (2019), who find that activities such as games can be specifically helpful to depersonalize sensitive topics, such as poverty and power imbalance, and create a safe space for transformative travelers to discuss with one another. Further, the Transformative Travel Experience Scale is particularly useful for program managers who desire to adapt their program design because they are either facing a change in the demographics of participants or they want to reach a new segment of travelers. Thus, the Transformative Travel Experience Scale can allow them to longitudinally track the transformative experience of travelers across different groups (e.g., professionals seeking personal growth and young adults seeking an immersive experience in a new culture).

Having a scale to measure the transformative experience of travelers is also crucial for staff training. The Transformative Travel Experience Scale can help tour guides recognize their power to trigger deeply meaningful and life-changing experiences (Walker & Weiler, 2017), manage groups of travelers that have drastically different emotional connections with the destination, and measure if they adequately adapt their discourse to the difference in travelers' knowledge and emotional involvement in order to successfully trigger transformation (Magee & Gilmore, 2015). In addition, transformative practitioners often closely mentor travelers through

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intense transformative experiences (e.g., travelers attempting to climb a high summit, veterans returning to areas where they once fought, and dual-narrative programs pairing travelers with opposing narratives of wars/conflicts). By being able to quickly measure the travelers' transformations, practitioners can swiftly adapt their strategies to coach future travelers through the emotional and even physical challenges they will encounter during the trip. Hence, the Transformative Travel Experience Scale provides a valuable tool to train staff by providing them with important feedback from travelers.

The Transformative Travel Experience Scale is also helpful to organizations that want to capture the positive changes resulting from participation in transformative tourism programs when applying for certifications, awards, and grants. This is likely to be particularly relevant for NGOs that want to tell their story in a compelling way, raise awareness about their organization, and capture the attention of donors. In particular, NGOs are frequently confronted with the difficulty of having their valuable time and limited resources stretched by the need to measure impacts for grants applications (Prince & Ioannides, 2017). While testimonies are an important part of assessing the transformative impacts of an organization, the scale offers the opportunity to collect empirical data in a time and cost-efficient manner. The objective is not to disregard the wealth of information provided by testimonies but to offer a complementary tool that helps organizations to depict a powerful picture of their positive impacts on society. For example, the Transformative Travel Experience Scale can quickly be sent to alumni who participated in an organization's program and be combined with other measurements to assess satisfaction and willingness to recommend the organization.

Although the Transformative Travel Experience Scale offers concrete applications for practitioners, it is also important to acknowledge that this study faces some limitations. One of these limitations is that respondents are self-describing as having experienced a transformation.

Although we implement a screening process, the perception of transformation is deeply personal and we partly rely on the participants' ability to identify themselves as transformative travelers. An additional limitation concerns the time elapsed for the travelers since their transformative experience. We do not know how long it has been since their transformative experience; it would be valuable to compare travelers based on time since participation (e.g., weeks, months, or years). Another limitation common in survey research is a side effect of the need to keep the instrument concise, constraining the data collection of additional variables. The lengthy survey includes demographic questions, a 24 item scale for the transformative process, and a 14 item scale to measure empathy that is specifically used in the study to test for nomological validity. It would be useful to collect variables related to satisfaction, loyalty and positive word of mouth about the destination, organization, and/or tour operators.

Looking ahead, the research area of transformative travel is rich and offers many opportunities. One area of research concerns the exploration and identification of different predictors of transformation including program/guiding variables such as the tour guides' level of emotional engagement with transformative travelers, their decisions concerning experience management (e.g., setting time aside for meditation or discussion), and their involvement in tour planning (e.g., types of activities and degree of physical difficulty and/or cultural immersion) (Saunders et al., 2017). Additionally, there are possibilities of relationships between the travelers' transformative experiences and travelers' variables such as cultural capital, emotional solidarity, personality types, and civic sense (Knollenberg et al., 2014; Wolf et al., 2017). Other areas to investigate for future studies are the marketing and communication strategies surrounding transformative travel. As suggested by Robledo and Batle (2017), transformative travelers are unique in the sense that they have a high propensity to engage in proselytism and genuinely desire for other travelers to also experience a successful transformation. Thus, the

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travelers' desire to share their powerful testimonies can be channeled by destination

organizations and tour operators to develop strong content marketing about the destination and

ultimately market themselves in a unique and effective way. In particular, Walter (2016)

mentions that it is crucial to visualize transformation as an imaginative experience and to better

understand the symbols and emotions present in those travelers' testimonies. Those symbols and

emotions can then be used to develop marketing content that resonates with an organization's

desired market segment. Because they are life-changing, transformative experiences are also

likely to trigger emotional attachment to a destination as well as generate powerful memories

(Walker & Moscardo, 2016) which in turn can result in added resources. Hence, destinations

developing activities related to transformative travel are likely to gain a competitive edge. Lastly,

and quite importantly, there is a paucity of studies that investigate the impacts of transformative

travel in host communities from a critical perspective. Taking on a critical perspective is crucial

to maximizing the benefits for the local communities that welcome travelers. Such studies are

also vital to help build future transformative travel programs that foster self-empowerment in

host communities, encourage meaningful interactions between travelers and residents, and

inspire civic engagement for all involved.

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CHAPTER 3: TRAVELERS' REFLECTIONS ON THE TRANSFORMATIVE POWER OF TOURISM*
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Abstract

Using the lens of Interaction Ritual Chains theory (Collins, 2004), this study investigates transformative travelers' symbolism and narratives of change. Transformative tourism is a form of travel that focuses on encouraging travelers to develop more tolerant worldviews and become agents of change in their community by promoting cross-cultural understanding and social empowerment (Reisinger, 2013). An original multi-methods approach is utilized that includes drawings, sentence completions, and in-depth interviews to investigate 1) how and in what ways transformative tourism narratives are symbolized by travelers and 2) how transformative tourism practitioners can use these symbols and narratives to develop content marketing for their experiences.

Key words: transformative tourism, interaction ritual chains theory, travel experience, drawings, projective techniques, narratives, symbols

Graphical Abstract

Research questions:
1) How are transformative tourism practitioners viewing marketing symbols and narratives?
2) How and in what ways are transformative tourism narratives symbolized by travelers?

Proposition 1
Transformative tourists will have common symbols and narratives that are unique to the transformative tourism experience.

Interactions Ritual Theory

Proposition 2
Those symbols and narratives can be used to develop content marketing for transformative tourism.

Methodology
Step 1: pilot studies
Sample: transformative tourism practitioners
Objectives:
-Gather perceptions about the importance of symbols and narratives
-Receive critical evaluation

Sample: transformative travelers
Objectives:
-Identify questions and thematic areas to pursue
- Refine and test research instruments

Methodology
Step 2: investigate proposition 1
Sample: transformative travelers
Projective techniques:
-Sentence completion
-Bubble drawing

Methodology
Step 3: investigate proposition 2
Sample: transformative travelers
Interview:
-In-depth and semi-structured interviews
Projective techniques:
-Sentence completion

Expected outcome for practitioners: develop marketing tools that have the potential to increase market share through the following

-Enhance perceived credibility; legitimacy, and quality of offered experiences
-Generate trust and confidence in their ability to deliver on promises

-Present the organization in a coherent manner
-Showcase accomplishments
-Develop a strong identity

Introduction

Using the lens of the Interaction Ritual Chains (IRC) theory (Collins, 2004), this study investigates transformative travelers' creation of symbolism and narratives of change. Transformative tourism aims at pushing the travelers out of their comfort zone, encouraging them to self-reflect about the discomfort felt, leading them to become more tolerant, and prompting them to implement positive and concrete changes in their community (Soulard et al., 2019). Because transformative tourism focus on implementing positive and concrete changes, this form of tourism offers a potential solution to foster cross-cultural understanding, ecological awareness, and socially responsible behavior (Smith, 2017). This potential for positive and concrete changes is the reason why there is a need to market transformative tourism to travelers (Smith, 2017). In order to successfully market transformative tourism to travelers, practitioners relies on the use of meaningful storytelling, symbols and imageries that deeply resonate with travelers (Walter, 2016).

From a theoretical perspective, studying the symbols associated with transformative tourism answers the call of researchers to investigate the role of imagery, symbols, and metaphors in transformation (Cranton & Roy, 2003; Dix, 2016; Walter, 2016). When advertising transformative tourism, there are divergences concerning the symbols and narratives that are the most adequate and need be put forward in marketing content (Robledo & Batle, 2017; Walter, 2016). While Walter (2016) suggests that transformative travelers recognize themselves in symbols related to culture and spirituality, Robledo and Batle (2017) advocate for the use of symbols depicting transformative travelers as explorers. Others observe that symbols related to the explorers can inadvertently perpetuate a narrative that promotes concepts such as imperialism and white privilege (Bruner, 1991; Germann Molz, 2016).

The Interaction Ritual Chains theory provides an interesting theoretical lens to investigate those contingencies because it recognizes that travelers' symbols and narratives are at the heart of social interactions such as the one experienced between travelers and residents (Boyns & Luery, 2015; Sterchele, 2020). Although the Interaction Ritual Chains theory is seldom applied to tourism, there are calls to use it as a theoretical lens to study the narratives of transformative travelers because of its focus on shared emotions, common experience, and group solidarity (Lamers, Van der Duim, & Spaargaren, 2017; Sterchele, 2020). Thus, the Interaction Ritual Chains theory provides a relevant theoretical framework to investigate ways to develop marketing content for an experience by using symbols that tap into the desires of transformative travelers.

From a methodological standpoint, this study takes on an original approach by combining in-depth interviews with the projective techniques of drawings and sentence completions (Marshall, 2016). Building on the pioneering work of Gamradt (1995), drawings and sentence completions are used as ways for transformative travelers to reveal symbols and narratives presents in their transformative travel experience. Because in-depth interview and projective techniques facilitate free-flowing communication, they offer a relevant tool to address emotionally charged and complex topics such as transformative experiences and investigate how to effectively market those unique experiences (Aaker & Stayman, 1992; Mesías & Escribano, 2018; Nurkka et al., 2009).

With regard to practical implications, this study focuses on symbol recognition and group membership makes the interaction ritual chains theory particularly interesting to study brand image and association (Benzecry & Collins, 2014). They are calls to further investigate how the interaction ritual theory relates to topics such as the decision-making process and the symbolic representation of brands and experiences (Benzecry & Collins, 2014; Huggins, Murray, Kees, &

Creyer, 2007). Powerful symbols can help transformative tourism practitioners to uphold their social-change ideology in their marketing content while at the same time resonating with a broader base of individuals (Garud, Schildt, & Lant, 2014; Holt & Cameron, 2010; O'Neil & Ucbasaran, 2016). By using recognized narratives and symbols, transformative tourism practitioners can present themselves in a coherent manner (Manning & Bejarano, 2017), showcase their organization's accomplishments in a convincing way (Fisher, Kuratko, Bloodgood, & Hornsby, 2017; Manning & Bejarano, 2017), develop a strong brand identity (Clarke, 2011; Lounsbury, Gehman, & Ann Glynn, 2019), and generate trust and confidence in their ability to deliver on their marketed promises (Ingram Bogusz, Teigland, & Vaast, 2018). The end goal is to use those symbols and narratives in content marketing to depict a travel experience in which individuals want to be associated because it aligns with their idealized version of self and reflects how they want others to look at them (Laing & Frost, 2017). Therefore, the Interaction Ritual Chains theory offers a valuable theoretical framework to investigate 1) how are transformative tourism practitioners viewing marketing symbols and narratives as well as 2) how and in what ways transformative tourism narratives are symbolized by travelers.

Interaction Ritual Chains Theory

The role of symbols in human interaction is well documented (Rasmussen, 1983). The Interaction Ritual Chains theory (Collins 2004), focuses on how symbols influence situations in which individuals interact with each other. In his Interaction Ritual Chains theory, Collins (2004) uses the word *ritual* to characterize our daily social interactions because successful interactions require a shared cultural knowledge of important social norms and codes (Sterchele, 2020). These social norms and codes are vital for us to find social groups that accept us and where we

can thrive socially (Collins, 2004, 2005; Collins & Hanneman, 1998). For example, sporting events can create an opportunity for people to rally together with other individuals who want to take concrete actions to foster tolerance and inclusion in the sport community (Sterchele, 2020). Hence, our social interactions are deeply inscribed into the micro-dynamics of communication and group inclusion (Benzecry & Collins, 2014; Goss & Sadler-Smith, 2018).

This focus on group inclusion is central to Collins' theory (2004), where he postulates that through social interactions we are collectively reinforcing our expectations and norms concerning how others should behave in a similar situation, what traditions should be followed, and which cultural heritage should be passed on to other members of the group (Calderón-Monge, 2017). This shared knowledge of norms and codes can also be described as cultural capital on which we rely to develop successful social interactions with others (Wellman Jr, Corcoran, & Stockly-Meyerdirk, 2014). Liebst (2019) further explains that individuals are attracted to rituals that "match up with their cultural capital and emotional energy" (p. 28). Individuals with high stocks of cultural capital act as magnets and become the center of attention during social interactions with others who are identifying with their values (Wellman Jr et al., 2014).

Expanding on the role of social interactions, Collins states that we are seeking human interactions because we are in a constant quest for the emotional energy that gets released during social encounters (Calderón-Monge, 2017). More precisely, Collins (2004) defines emotional energy as "a feeling of confidence, courage to take action, boldness in taking initiative" (p.39). Individuals carry this emotional energy with them into their next interactions creating emotional chains between members of a society (Basic, 2017; Owczarski, 2017; Simons, 2019). Thus, the end goal of successful interaction is to develop a feeling of solidarity among group members,

foster the recognition of common symbols and representations, and encourage members to respect and value those symbols (Richards, 2015).

Successful interactions also rely on the concept of collective effervescence, which states that group members feel elated by taking part in the same social rituals (Sterchele, 2020). Collins (2004) further defines collective effervescence as a "process of inter-subjectivity and shared emotion" that creates a feeling of communion (p. 49). This concept of collective effervescence has been applied to tourism to study the behaviors of fans in sports stadiums, attendees at mega-events and festivals, and even hikers at campgrounds (Compton & Gruneau, 2017; Cottingham, 2012; Simons, 2019; Sterchele, 2020). For example, Cottingham (2012) explains that football fans share symbols such as colors, songs, and clothing and that those symbols create a feeling of unity and connection. For Collins (2004), those powerful social interactions that are crucial to define our social structures.

As with any theoretical framework, the Interaction Ritual Chains theory possesses some limitations (Dermody, 2017; Kemper, 2016; Liebst, 2019). One critique of the theory is that it focuses too much on social interactions and forgoes other elements that can lead to collective effervescence (Liebst, 2019). For example, Liebst (2019) mentions that other situational elements come into play to create collective effervesces at music festivals such as preferences toward crowding (i.e., someone liking to be part of a crowd and who feels positive energy by being in places with high density of participants). Another limitation of the theory is that Collins (2004) postulates that individuals need to be present physically and interact face-to-face with each other for collective effervescence to happen. However, technological advances have made it possible for people to experience collective effervescence remotely through platforms such as online groups, social media, blogs, and websites (DiMaggio, Bernier, Heckscher, & Mimno, 2018; Simons, 2019)

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An additional criticism of the Interaction Ritual Chains theory concerns the motivations to take part in collective effervescence (Dermody, 2017). In his review of the theory, Kemper (2016) suggests that two other factors, power, and status, can lead people to feel obligated to take part in collective effervescence. However, Dermody (2017) argues that the influences of power and status are very context-specific and do not apply to all types of tourism. He gives the example of dark tourism where collective effervescence is more likely to rely on powerful emotions rather than status or power. This distinction is important as dark tourism is described as a type of travel that is likely to be transformative (Reisinger, 2013). While the Interaction Ritual Chains theory faces some criticisms, it has been applied across a variety of fields, has generated fruitful discussions, and is recognized as a compelling theory to examine the power of rituals in society (Curry & Gordon, 2017; DiMaggio et al., 2018; Heinskou & Liebst, 2016).

Interaction Ritual Theory Framework and Transformative Tourism

The work of Collins is of particular importance when investigating the symbols and narratives that transformative travelers associate with their experience (Sterchele, 2020). Notably, Collins (2004) lists a series of ingredients that need to be present in order for an interaction to be successful and create a transformative travel experience: group assembly, the barrier to outsiders, the mutual focus of attention, and shared mood (Figure1) (Sterchele, 2020). In his Interaction Ritual Chains theory, Collins (2004) postulates that group assembly is a crucial ingredient for individuals to feel connected with other people via meaningful social interactions (Wellman Jr et al., 2014). This importance of group assembly is acknowledged in the transformative tourism literature (Germann Molz, 2016; Laing & Frost, 2017; Noy, 2004). For example, Noy (2004) notes that for transformation to be perceived as real by travelers, they need their friends and relatives to acknowledge that they have come back a changed person. In Noy's study (2004), this is visible when backpackers are praised by their parents as being more mature,

independent, and knowledgeable as a result of their trip. The importance of group assembly is

also visible in the work of Germann Molz (2016) who finds that volunteer tourism offers

families the opportunity to be transformed through the development of stronger bonds, mutual

respect, and improved communication.

Figure 1. Theoretical framework for the Interaction Ritual Theory from Collins (2004, p.48)
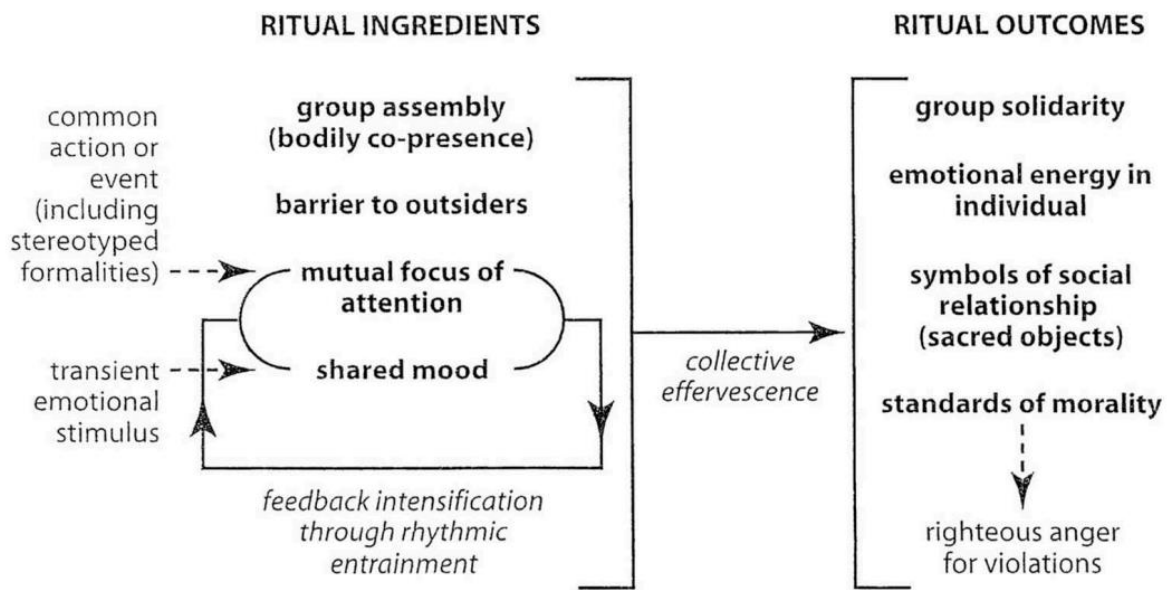
While group assembly is an important ingredient to create a feeling of collectiveness,

group members also define the social boundary of a group by setting a barrier excluding

outsiders (Collins, 2004). The barrier can be physical (volunteer tourists who are working on the

same site) or symbolic (such as shared language and knowledge) (Wellman Jr et al., 2014). The

presence of a barrier to outsiders is visible in the transformative travelers' experience (Kirillova

et al., 2017c; McWha et al., 2018). For example, McWha et al. (2018) mention that bloggers who

are writing about their transformative tourism experiences show a clear dichotomy in their

writing. They are consistently opposing the ideal of adventurous travelers who are going off the

beaten path to mass tourists who are represented as being members of a herd of sheep. Thus,

transformative travelers set a barrier to outsiders who engage in more commercialized forms of travel.

Once the boundaries to outsiders are set, group members are free to take part in the mutual focus of attention which is high levels of inter-subjectivity that bolster their cultural capital (Wellman Jr et al., 2014). Based on the Interaction Ritual Chains theory, individuals who possess a high stock of cultural capital are an important ingredient because they are more likely to be a focus of attention and make interactions enriching to their group of interlocutors (Collins, 2004). For example, Collins and Hanneman (1998) explains that "having similar things to talk about (complaining about the same political enemy; laughing at the same jokes) enhances the immediate mood" (p. 220). Mutual focus on attention is present in the transformative travelers' experience as a way to create unity with residents and travelers (Bos et al., 2015; Magee & Gilmore, 2015; Walker & Moscardo, 2016; Walter, 2016). For example, Walker and Moscardo (2016) find that learning directly from Aboriginal guides about the symbols and meanings behind the paintings of sacred caves facilitates transformative outcomes for the travelers who visit Stanley Island, Australia.

The last ingredient is shared mood and occurs through specific individuals that Collins (2004) calls Energy Stars. Energy Stars are individuals who are leaders and have the capacity to increase the positive emotional energy resulting from social interactions (Sterchele & Saint-Blancat, 2015). This concept of Energy Stars seems to echoes the one of Agent of Change in the transformative tourism literature in as both embodies the principles that are valued by group members and take part in concrete actions to generate positive changes in their community (Soulard et al., 2019; Sterchele, 2020). The presence of Energy Stars as strong figures, fictional or real, is visible in the transformative tourism literature (Frost, 2010; Laing & Frost, 2017). In their study of the autobiography of women solo travelers, Laing and Frost (2017) conclude that

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women writers act as inspirational figures and that their testimony depicts a powerful picture of transformative travel.

In his Interaction Ritual Chains theory, Collins also highlights four key long-term outcomes of collective effervescence: group solidarity, emotional energy in individuals, symbols of social relationship, and standards of morality (Collins, 2019). Group solidarity occurs when individuals feel like they are part of a group and emotionally connected to one another (Collins, 2004). Reference to group solidarity is also found in transformative tourism literature (Richards, 2015). When conducting an extensive review of transformative tourism and park experience, Wolf et al. (2015) find that interpretative tours represent an opportunity for individuals to bond with each other through shared values on natural resources. The presence of group solidarity is also suggested to be present in transformative experiences such as genealogical tourism where individuals' motivation to travel in anchored in their desire to connect with their origins (Santos & Yan, 2010).

Another outcome of collective effervescence is emotional energy that Collins (2004) defined as "a feeling of confidence, elation, strength, enthusiasm, and initiative in taking action" (p. 49). The presence of emotional energy is frequently observed in findings from the transformative literature (Kidron, 2013; Kirillova et al., 2017c; Magee & Gilmore, 2015). When examining the triggers to transformation, Kirillova et al. (2017c) find that intense emotions are crucial and unique ingredients of transformation. For example, transformative travelers report feeling deeply moved by the connection they establish with the past when visiting sites such as concentration camps and those intense emotions trigger powerful self-reflection about society, peace, and human connection (Kidron, 2013; Magee & Gilmore, 2015). In subsequent studies on volunteer tourists, Coghlan and Gooch (2011) and Coghlan and Weiler (2018) also find that

volunteers report developing cognitive and social skills as a direct result of their transformative experience.

An additional outcome of collective effervescence is individuals' communion around symbols that Collins (2004) explains "represent the group, [such as] emblems or other representations (visual icons, words, gestures), that members feel are associated with themselves collectively" (p.49). The group members, not only recognize themselves in those symbols but are also guarding and protecting those symbols from outsiders and their criticisms. Transformative tourism is itself associated with powerful symbols and imageries (DeCrop et al., 2018; Wolf et al., 2017). For example, the transformative literature mentions symbols related to the explorer (Caton & Santos, 2007; Noy, 2004; Robledo & Batle, 2017). However, it is important to note that a limitation of the symbols related to the explorer is that those symbols do not give center stage to the community residents who are merely being described as one element of an adventure (Noy, 2004). Several researchers point out that symbols associating transformative travelers with explorers can trigger connections with negative concepts such as imperialism and white privilege (Bruner, 1991; Germann Molz, 2016).

Another set of symbols present in the transformative tourism literature is related to existentialism (Kirillova et al., 2017c; Laing & Frost, 2017; McWha et al., 2018). For example, McWha et al. (2018) mention the crucial importance of symbols connecting to existentialism while interviewing transformative tourism bloggers. For example, one of their informants took part in initiation rituals on New Guinea and decided to tattoo his legs and arms with drawings that symbolized the crocodile spirit that became part of his spiritual rebirth process. In a series of articles, Zahra (2006) and Zahra and McIntosh (2007) find the presence of powerful symbols linking the transformative experience of volunteer tourists with God and a general questioning about the meaning of life. Symbols related to the meaning of life are also present in Kirillova et

al. (2017c) study about transformative travelers. For example, one of their informants has developed his own symbol to describe "what he called 'the beast', which is a manifestation of everything in the world that make people worry and unhappy" (p.506). This metaphor clearly illustrates the powerful symbolic attached to the disorienting dilemma in the transformative process of travelers.

Within the transformative tourism literature there is also the presence of symbols related to magic and enchantment (Frost, 2010; Walter, 2016). In his study on catalysts of transformative tourism, Walter (2016) mentions that the transformative experience of travelers marks a sharp difference with their everyday life. Because of this strong disconnect with their day-to-day reality, travelers are likely to associate their transformative experience with symbols related to magic, wonderment, and awe (Reisinger, 2013; Wolf et al., 2015). In his study of the depiction of transformative experiences in movies set in the Australian outback, Frost (2010) mentions the importance of symbols that are linked in with magic, mystery, and the supernatural. More recently, DeCrop et al. (2018) suggest the importance of re-enchantment as travelers reconnect with themselves after feeling alienated and disenchanted by modern consumerism. Hence, the current literature indicates the presence of powerful symbols associated with transformative tourism and engendered the following proposition for the current study:

Proposition 1. Transformative tourists will have common symbols and narratives that are unique to the transformative tourism experience.

In light of the importance its places on symbols, the Interaction Ritual Chains theory is also commonly used as a lens through which to investigate consumers' experiences (Richards, 2014; R. Rose & Poynor, 2007; Seraj, 2012) and emotions (Namasivayam, 2003; Sandlin & Callahan, 2009; Sredl, 2010). Indeed, the Interaction Ritual Chains theory suggests that

individuals seek rituals that generate positive energy and make them feel included within a group. Interaction Ritual Chains theory also states that travelers who are external to the group seek its membership because they desire to feed from this positive emotional energy (Sterchele, 2020). Specific to this research, powerful symbols can be used to develop marketing content that will encourage more travelers to take part in transformative tourism (Noy, 2004; Walter, 2016; Wolf et al., 2017). For example, Wolf et al. (2017) state that "marketing should aim to appeal to the typical characteristics of the transformative traveler like intellectual curiosity, an emotional need or desire for challenge, and a mindset required to resolve the dilemma intrinsic to the transformation process". In the same way, Walter (2016) counseled transformative tourism practitioners to market transformative tourism as an alternative and socially responsible form of travel.

Pushing the reflection further, Noy (2004) suggests that transformative travelers are likely to engage in proselytism at home and are avidly sharing their stories in a manner to encourage others to take part in transformative tourism. This form of proselytism at home echoes the concept of "standard for morality" that Collins (2004) outlines in his interaction ritual chains theory. Standard for morality occurs when individuals are defending their newfound way of life against others. For instance, Laing and Frost (2017) advise marketers to capitalize on the traveler's own narrative of their transformative trip when attempting to market their destination as a place for self-growth, wellbeing, and spiritual discovery. Likewise, Frost (2010) suggests that having compelling characters through whom the viewers can vicariously live is crucial to develop marketing content that successfully promotes transformative experiences at destinations. Therefore, the following proposition is made with regard to content marketing and transformative tourism:

Proposition 2: Transformative travelers' symbols and narratives can be used to develop content marketing for transformative tourism.

A theoretical triangulation approach is explored in the present study as both the transformative learning and the interaction ritual chains theories are used as theoretical lenses. The next section details the methodology that is employed to investigate; 1) how and in what ways transformative tourism narratives are symbolized by travelers and 2) how do transformative tourism practitioners view marketing symbols and narratives.

Methodology

The present research uses a multi-method approach that combines in-depth interviews and projective techniques in the form of sentence completions and drawings. The following section discusses the study in terms of researchers' stance, informants, research design, step-by-step process for informants, approach used for data analysis, trustworthiness, validity, and the two pilot studies.

Researchers' paradigm

The researchers adhere to an interpretative paradigm that ontologically recognizes that there are multiple realities to the same social phenomenon (Bailey, 2007). Interpretative researchers recognize that those realities are shaped by cultural, sociological, political, and historical contexts (Golafshani, 2003). The main objective behind adhering to an interpretative paradigm is to comprehend "the meaning, symbols, beliefs, ideas, and feelings given or attached to objects, events, activities, and other by participants" (Bailey, 2007, p. 53). This objective is central to interpretative researchers who recognize that their own past experiences are influencing their choice of theoretical lens, method choices, and data interpretation (Ponterotto, 2005). To fully grasp the impact of past experiences, the main researcher continuously engages in self-reflectivity thorough the project to consider how her own experiences and beliefs

interacted with the phenomenon of interest. By recognizing the effect of their past experiences and being aware of their world views, interpretative researchers aim at approaching the phenomenon of transformative tourism with an open mind (Marshall & Rossman, 2014).

Informants

Informants are transformative travelers who are being interviewed after they have experienced a transformative trip and have returned home (Kirillova et al., 2017c; Maxwell, 2012; Wu & Rau, 2018). Using purposeful sampling, informants are recruited via emails and social media posts that are sent by transformative tourism organizations to their clients' list. Therefore, the first step to recruit informants is to identify transformative tourism organizations that are interested in partnering with us for the study. To identify transformative tourism organizations, a roster of organizations to contact is created by searching for organizations on the following public portals: The Transformative Tourism Council, GoAbroad.com, and the Adventure Travel and Trade Association. During this step, it is also crucial to ensure that the selected organizations are offering experiences that are indeed transformative in nature. Based on Soulard et al. (2019) we use a set of seven criteria to select organizations in our roster. To be selected the organizations need to offer travel experience in which:

1) Travel and destination residents interact in a prolong and meaningful manner

2) Special care is shown to make sure the travel experiences are mutually beneficial for travelers and destination residents

3) Activities are purposefully built in the travel itinerary to encourage travelers to self-reflect about their experience

4) The itinerary is designed to push travelers out of their comfort zone

5) The travel experience is designed with the goals of encouraging skill development and fostering cross-cultural understanding

6) Concrete actions are taken by the organizations to mitigate their socio-cultural and ecological impacts at the destination

7) Destination residents are seen as equal partners and are treated in a socially responsible manner.

Participating transformative tourism organizations are also recruited based on a specific set of criteria to establish maximal variation (Creswell, 2014, 2016; Maxwell, 2012). Maximal variation is concerned with selecting organizations that offer a diversity of opinions and points of view with regards to informants (Marshall & Rossman, 2016). Thus, we want to ensure that the selected transformative tourism organizations still offer diversity in terms of their target market (e.g., young adults or retirees), proposed destinations (e.g., different geographical locations), and activities included in their programs (e.g., volunteering, adventure, and heritage/culture-based). When building the roster, we consider maximal variation by selecting transformative tourism organizations that:

1) Display manifestations that are central to the transformative learning theory on which the study is based – i.e., the seven criteria listed above (Bailey, 2007)

2) Are information-rich and offer the possibility of collecting relevant information with regards to the phenomenon of interest (Creswell, 2016)

3) Are easily accessed by the researcher (e.g.; phone interviews reduce the cost associated with traveling to a physical location) (Maxwell, 2012)

4) Offer the possibility of developing enriching and productive relationships concerning the research project (Maxwell, 2012)

Next, the selected transformative tourism organizations are contacted via an introductory email that shares detailed information about the study and invites them to partner with us. In the present study, access to travelers is determined by our ability to partner with transformative tourism organizations. During the study, we genuinely aim at nurturing and developing positive relationships with those contacted organizations (Marshall & Rossman, 2016; Maxwell, 2012). When introducing the study to organizations, a brief description of the study is shared with them which includes: why the organizations was contacted, the purpose of the research, what types of activity take place as part of the study, and the time needed to complete the study (Creswell, 2014). A total of 52 organizations are contacted via email and 7 agree to share a recruitment message to their clients via an email or a post on their social media. The recruitment message clearly states in bold font that the activities in the interview include: open-ended questions, sentence completion, and drawing tasks. This recruitment email/post also shares the email address of the principal researcher so that interested informants can contact her directly.

A total of 45 informants contacted the principal researcher. Once first contact is established, the IRB consent form and the interview worksheet are emailed to participants (Mitchell, Theron, Stuart, Smith, & Campbell, 2011). Informants are asked to complete different activities which include sentence completions, interview questions, and drawings (Guillemin, 2004). The interview worksheet includes guidelines and activities for the projective techniques. Informants are invited to email their completed worksheets prior to the phone interview. Before asking informants to share their completed interview worksheets, Kearney and Hyle (2004) mention that it is important to reassure them that the focus is on the symbolism attached to their

experience and not on the quality of the drawing or their artistic ability. Thus, a sentence is

included in the interview worksheet to stress that artistic abilities are not the focus of interest. In

this introductory email, the researcher also invites interested informants to set a date and time

that are convenient for them for the phone interview. Of those 45 interested informants, 37

responded to set a date for a phone interview. Shared reasons for the informants who declined to

set a date include summer travel plans, unexpected family/work emergencies, lack of time, and

not realizing that the study includes drawings. Clients are a very sensitive population for the

organizations so we make sure the informants were comfortable if they choose to decline to

participate. A $15 gift card is also offered to all participants who accept to be part of the study.

Data collection is conducted between May and August 2019. When we noticed that data

saturation was reached, we interviewed five more informants to ensure that no new information

were indeed emerging from conversation (Masson et al., 2016).

      When using multiple methodologies, Creswell (2014) also advises that informants take

part in all components (i.e., sentence completion, drawings, and open-ended questions) because

the end goal of a multi-method study is to establish a connection between the different databases.

Thus, we only conduct data analysis on the answers of participants who have taken part in all of

the components of the interview. A total of 37 participants take part in phone interviews.

However, two informants decline to take part in the activities that include projective techniques

(i.e., sentence completion and drawings). Their answers are not used for data analysis because

they do not provide data for all techniques but they still receive a gift card as a thank you for

their participation in the portion of the interview with open-ended questions.

      A total of 35 informants answer all components of the study (Table 1). Decisions

regarding the research design are discussed in detail in the next section. All informants are

assigned aliases to preserve confidentiality. While some of the travel experiences occur several

years ago, this time passed uphold the transformative tourism theory and is congruent with previous studies (Kirillova et al., 2017c). A tenet of the transformative tourism theory is that it applies to a travel that is unique and life-changing. The fact that informants are able to vividly recall their experience even when time as passed stresses the transformative nature of their travel.

Table 1. Descriptive information about informants

Nickname	Age	Destination	Duration of Travel	Occupation	Place of Residence	Sex	Year of Travel
Addison	51	Nepal	2 weeks	Teacher	USA	Female	2018
Andrew	25	Nepal	2 weeks	Unemployed	Germany	Male	2016
Betty	77	Tanzania and Kenya	2 weeks	Retired	USA	Female	1993
Bradley	79	China	3 weeks	Retired	USA	Male	2014
Brianna	65	Germany	2 weeks	Retired	USA	Female	2016
Brynne	18	U.S. Virgin Islands	2 weeks	Student	USA	Female	2019
Caylee	69	Italy	2 weeks	Retired	USA	Female	2016
Charlotte	55	USA	2 weeks	Homemaker	USA	Female	2018
Colton	33	South Africa	10 months	Unemployed	Australia	Male	2017
Daniella	73	Russia	3 weeks	Retired	USA	Female	2002
Daphne	40	Chile	2 weeks	Teacher	USA	Female	2015
Dena	37	South Africa	2 weeks	Life coach	USA	Female	2014
Derek	63	Cuba	3 weeks	Retired	USA	Male	2017
Eloise	70	USA	3 weeks	Intercultural communication specialist	USA	Female	2019

Emily	70	Israel and Palestine	1 week	Retired	USA	Female	2016
Eric	70	Peru	3 weeks	Retired	USA	Male	2004
Fabian	60	Egypt	3 weeks	Retired	USA	Male	2012
Felicia	60	Poland	2 weeks	Professor	USA	Female	2013
Francine	55	Bosnia and Albania	2 weeks	Volunteer in the community	USA	Female	2014
Giselle	58	Switzerland and Scotland	1 week	Instructor	USA	Female	2004
Greg	67	Austria and Hungary	3 weeks	Technology consultant	USA	Male	2019
Gwen	27	Israel and Palestine	2 weeks	Project manager for destination marketing organization	Germany	Female	2017
Heather	24	USA & Mexico border	1 week	Graduate Student	USA	Female	2016
Helena	71	Ireland	2 weeks	Librarian	USA	Female	2009
Ileana	25	USA/Mexico border	1 week	Resident Director	USA	Female	2015
Iris	73	Cuba	1 week	Retired	USA	Female	2016
Julia	60	Tanzania	2 weeks	Retired	USA	Female	2014
Kayla	66	Tanzania	3 weeks	Retired	USA	Female	2019
Makenzie	63	China and Hong Kong	2 weeks	Retired	USA	Female	2019
Nicole	60	Kenya	2 weeks	Consultant	USA	Female	1996
Penny	23	Uganda	2 months	Graduate Student	USA	Female	2018

Rose	50	Uganda	7 months	Tour Director	Swaziland	Female	2010
Sophia	60	United Arab Emirates	2 weeks	Graphic Designer	USA	Female	2013
Tiffany	70	Ghana	3 weeks	Retired	USA	Female	2015

Research Design

The present study investigates research questions 1 and 2 via the use of in sentence completions, drawings, and in-depth interviews. Those specific techniques are chosen because of their relevance, complementary, applicability to the phenomenon of interest. Each of these techniques, their defining characteristics, and the justification for their use is further discussed below.

Projective techniques

In the *International Journal of Market Research*, Boddy (2005) defines projective techniques as "techniques [that] facilitate the articulation of otherwise repressed or withheld thoughts by allowing the research participant or subject to 'project' their own thoughts onto someone or something other than themselves" (p. 240). When using projective techniques, researchers ask that informants answer the questions quickly with the first image/word that come to their mind. As recommended by Mesías and Escribano (2018), we start the interview process by reassuring informants that there is no right or wrong answers. Projective techniques include a very specific set of procedures which can be classified into two overarching categories: 1) construction techniques and 2) completion techniques (Mesías & Escribano, 2018). Construction techniques ask informants to develop a story and/or share emotions based on a prop. Construction techniques typically include: word associations, photograph response test, collage construction, bubble drawing, and storytelling (Mesías & Escribano, 2018). The present study uses bubble drawings as part of the interview process. More precisely, informants completing a

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bubble drawing task are presented with a theme and asked to communicate about this theme by drawing their emotions, opinions, and/or behaviors. Informants are then asked to write down their thoughts inside a bubble (similar to what can be seen in a comic book) that is located above the drawing space. Researchers ask informants to interpret the drawing, explain its meaning, and how the drawing relates to their transformative experience (Pich & Dean, 2015). The objectives are to give center stage to the informants by allowing them to share their own interpretations, to reveal how they perceived themselves, and to better comprehend the informants' thoughts about their transformative experience.

The other category of projection technique regroups completion techniques (Mesías & Escribano, 2018). In completion techniques, informants are shown an incomplete scenario or sentence and are asked to fill-in the blanks (Mesías & Escribano, 2018). The present study uses sentence completions and we reassure the informants that there is no right or wrong answer (Mesías & Escribano, 2018). The objective is for informants to answer as fast as possible. This technique can be applied either orally or in writing. We chose to use writing as the sentence completion and bubble drawing tasks are designed to be part of an interview worksheet that is shared with informants prior to the phone interview.

One of the strongest limitations faced by marketing researchers is that consumers usually find it difficult to formulate what their motivations are and to share which underlying desires have triggered those motivations (Mesías & Escribano, 2018). Mesías and Escribano (2018) further explain that projective techniques are especially valuable because "consumers are frequently unable –or simply find it difficult – to express the underlying reasons for [their purchase]" (p. 79). While those issues are common to any marketing related topics, Aaker and Stayman (1992) add that "they are likely to be particularly prevalent in studying transformational effects" (p. 234). Transformative experiences trigger powerful and intense emotions which might

be hard for individuals to verbally formulate (Dix, 2016). In the recent literature, researchers explain that there is a need for travelers to engage biographical writing (e.g., journals, blogs, and even books), participate in arts-based activities (e.g., painting and singing), and partake in role-play/theatre to process the full gamut of emotions encountered during their transformation (Coghlan & Gooch, 2011; Laing & Frost, 2017; McWha et al., 2018). The present study answers this call by using a multi-method approach that offers to travelers the ability to express their emotions more creatively. By using different projective techniques in the present study, we maintain our adherence to the interpretative paradigm and acknowledge that travelers are processing and expressing their transformative experiences in different manners. From a transformative tourism perspective, using multiple projective techniques is theoretically congruent with the works of Robledo and Batle (2017) and Laing and Frost (2017) who find that the travelers' transformative experience is rooted in deep symbolism, mythology, and emotions.

Although projective techniques offer some advantages, some limitations need to be acknowledged. One limitation is that researchers need to develop robust coding schemes that take into account the different medium used such as pictures, texts, and drawings (Soley, 2010). We address this issue by following the coding protocol outlined by Caracelli and Greene (1993) to foster validity (See section on trustworthiness and validity). Another limitation of projective techniques such as bubble drawing is that some informants can be surprised or even resistant to take part in the task (Catterall & Ibbotson, 2000). For example, Kearney and Hyle (2004) use drawing with firm employees and notice that several of them were at first hesitant to take part in the drawing section of the interview because they complained that they did not have any artistic abilities. To overcome this resistance, Catterall and Ibbotson (2000) recommend starting interactions with informants with a type of projective technique that triggers less resistance such as sentence completion. The objective is to help informants to build confidence in their ability to

provide answers before introducing more surprising forms of interview task. They also advise researchers to be upfront with the informants and explain why they are asking for a drawing (e.g.; drawing is a great way to discover important themes). We closely follow their recommendations when designing the guidelines for the interview worksheet.

Because projective techniques allow informants to express those emotions in an individualized way, they are a useful tool to break the initial awkwardness between the researcher and informant (Kubacki & Siemieniako, 2017; Prosser, 2012). Another advantage of projective techniques is that they make the informants feel more engaged in the research process and are often being described by informants as fun and unexpected (Mesías & Escribano, 2018). In their review of projective techniques, Catterall and Ibbotson (2000) mention that projective techniques are more likely to foster imagination, creativity, and curiosity from informants "because they are different, unusual, and intriguing" (p.248). They also explained that this focus on creativity is especially important for marketers who are seeking rich and diverse data from informants. With projective techniques, there is also less pressure for informants to conform to social desirability "as there are no right or wrong answers and individuals are free to respond to the ambiguous stimulus from their own point of view" (Hindley & Font, 2018, p. 80). This an important strength to consider because social desirability is likely to be present when asking individuals about their travel experiences (Hindley & Font, 2018).

While they originate in the field of psychology, projective techniques are increasingly used in marketing and consumer research (Mesías & Escribano, 2018). Projective techniques are used to better comprehend the images, worldviews, and perceptions that informants attribute to brand and experiences (Nurkka et al., 2009; Soley, 2010). In previous marketing studies, projective techniques are successfully used to understand how the concept of transformation is depicted in advertisements, marketing, and consumer research (Kim, Lloyd, and Cervellon

(2016). In agreement with our line of inquiry, projective techniques are cited as a relevant tool to study cultural symbols and narratives associated with an experience (Catterall & Ibbotson, 2000; Kim et al., 2016). This ability to unearth symbols and narratives associated with experience is highly pertinent for transformative tourism. Indeed, transformative tourism literature suggests that transformative tourism is likely to be associated with powerful symbols and narratives (Frost, 2010; Noy, 2004; Robledo & Batle, 2017). Hence, projective techniques offer an interesting tool to investigate the symbols and narratives associated by travelers to their transformative tourism experiences.

Sentence completions.

For the present study, the set of sentence completions is created following the guidelines outlined by Nurkka, Kujala, and Kemppainen (2009). We start by creating a broad and large set of possible sentences. The goal is not yet to make a selection among the sentences but to foster creative thinking and generate many sentences as possible. Next, we organize those sentences are based on whether they address broader or more specific aspects of transformative tourism. We do the first selection among the sentences by removing the ones with confusing or unclear wordings (Nurkka et al., 2009). To improve validity, we conduct a pilot study in order to receive feedback on the clarity of sentences and further reduce the number of sentence completions that will be used in the actual study (See section on the second pilot study). In the guidelines, we clearly indicate to informants that they need to complete those sentences as fast as possible with the first thoughts or associations that come to their mind. We also reassure the informants that there is no right or wrong answer. Based on the work of Dykens, Schwenk, Maxwell, and Myatt (2007) the following sentence is added to the instruction "Any answer that you give is the right one because it is your opinion - what you think or feel." (p.590). In the sentence completion task, sentences related to fairytale/folk story, magical creature, magical power, and spiritual entity are

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based on the work of Dykens et al. (2007). The sentences related to the color, emotion, animal, adjective/noun, and picture come from the work of Nurkka et al. (2009). The full interview worksheet is included in the appendix.

Bubble Drawings.

From an ontological perspective, the use of drawings is congruent with our research stance and acknowledges that there are multiple perceptions of reality as informants are asked to share their unique perspectives on transformative tourism (Literat, 2013). Asking informants to describe their drawings encourages them to think about the meaning they attached to their experience and how it ties in with what they have already discussed during the interview (Guillemin, 2004; Kearney & Hyle, 2004). The use of bubble drawings is also consistent with our defined epistemology because informants are able to take on a much more participatory stance, can direct the discussion, and tell researchers what they think is important to mention about their transformative tourism experience (Literat, 2013). Because informants are asked to draw their emotions on a blank sheet of paper they have to reflect on what their experience means to them (Kearney & Hyle, 2004). Based on this opportunity for self-reflection, we send to informants the guidelines for both the sentence completion and bubble drawings task in advance of the phone interview under the form of an interview worksheet (Haney, Russell, & Bebell, 2004; Kearney & Hyle, 2004; Literat, 2013).

To further facilitate the drawing process, Mitchell, Theron, Stuart, Smith, and Campbell (2011) recommend using a prompt to help provide a little structure and make the blank page less daunting. Inspired by the Person Picking an Apple from a Tree (PPAT) prompt, informants are asked to draw themselves (e.g., use stick figures) but also to represent themselves with something on the floor next to them, something in their hands, and something that they are wearing (Rollins, 2005). To represent the transformation, informants are asked to complete two

drawings: one representing themselves before the trip and one representing themselves after the trip. Finally, informants are asked to write down in the bubble anything that their cartoon self-representation might want to say (Boddy & Ennis, 2007; Mesías & Escribano, 2018).

When interacting with informants during the phone interview, it is crucial that informants are asked to interpret their drawings (Pich & Dean, 2015). Asking for the informants' own interpretations enhances validity, helps to ensure that researchers are not over-analyzing the drawings, and are not imposing their own views during the data analysis (Literat, 2013). In other words, the informants' interpretation of their drawings acts as a member check. During the phone interview, the interviewer first asks the informant to describe their drawing (Anfara Jr & Mertz, 2014). When needed, the researcher uses probes to gather more information by asking informants about the organization and configuration of the drawing (Guillemin, 2004). These questions are formulated to better understand both the contexts surrounding the drawing and the meaning associated with the drawing itself (Rose, 2016). As with the rest of the interview, the informants' interpretation of their drawing is audio recorded and later transcribed for data analysis (Guillemin, 2004). Based on the recommendations of Kubacki and Siemieniako (2017), the drawing stimuli is also pilot tested to ensure that the instructions are clear and free of biases.

When the interviewer is starting the analysis of each drawing, she asks herself the following questions in order to ensure that both the process and the product of the drawing become part of the analysis (Guillemin, 2004; G. Rose, 2001, 2016):

- Is the drawing consistent with the elements shared by the informant during the sentence completion task and the in-depth interview? If not, what elements differ?

- Are new ideas/themes being raised by the informant in the drawing?

- How did the informant reacted when asked to draw? Did the informant require encouragement from the interviewer?

- How did the informant react to his/her own drawing?

- What is the drawing showing?

- What are some key features/elements of the drawing? How are these elements being organized? How do they relate to each other?

- How did the informant associate his/her with the drawing? What connections are they between the drawing and the informant?

- How does the drawing inform the participants' understanding of their experience?

In-depth interviews

The use of in-depth individual interviews combines very well with projective techniques (Gamradt, 1995; Nurkka et al., 2009). In their overview of projective techniques, Nurkka et al. (2009) even describe the combination of projective techniques with in-depth interviews as "the ultimate situation" which offers researchers the ability to collect rich and pertinent data. In the present research, the in-depth interview follows a semi-structured approach (Creswell, 2016; C. Marshall & Rossman, 2016). This semi-structured approach is selected because it provides a baseline of common questions between the different interviews while at the same time letting the participants expand on topics that they perceive as important (Creswell, 2016). Semi-structured interviews are also recommended to more novice researchers because this form of interview provides them with some structure during data collection. The use of semi-structured interviews also aligns well with our interpretative stance because it supports an emic perspective where informants can decide which elements of their lived experience provide interesting insights (Marshall & Rossman, 2016) .

During the interview, the researcher follows Bailey's recommendations to collect observations about the informants' "body language", "speech pattern", "verbatim", tone of voice,

pauses, hesitation, and use of humor and/or irony (2007, p.90). Those observations are

conducted because they provide additional context and increase the validity of the collected data

(Bailey, 2007). Proving detailed descriptions help researchers to develop an audit trail so that if

the data were to be reviewed by an external auditor, this auditor will be able to reach similar

findings (Creswell, 2016). Hence, the descriptions help to ensure that the whole interview is

being transcribed truthfully with regard to the tone and rapport that are established with the

informants. Lastly, each informant receives via email the transcribed text of their interview

(Creswell, 2016). Informants are invited to review and edit the transcript to ensure that their

opinions are being truthfully depicted in the study.

Step-by-step process for informants

Based on the recommendations from Catterall and Ibbotson (2000), informants are asked

to answer the sentence completions and the bubble drawing tasks as part of the interview

worksheet before the phone interview. The interview worksheet starts with the sentence

completion because Catterall and Ibbotson (2000) explain that "it is not too different from what

[informants] might expect to and on a questionnaire and leads them in gently to the more unusual

technique" (p.252). Next, the interview sheet guidelines invite informants to complete their

bubble drawings (Catterall & Ibbotson, 2000).

Before starting the phone interview, informants are asked to email back their completed

interview worksheet. Based on Creswell's (2016) recommendations, the researcher gets ready for

the interview by writing down key information like the time at which the interview is scheduled

to start and the aliases given to the interviewee. At the beginning of the interview, the

interviewer starts by introducing herself, thanking informants for agreeing to participate,

discussing the goal of the study, expressing genuine interest in hearing the informants'

perspectives on the topic, explaining how the interview unfolds, and asking informants if they have any questions (Carol A Bailey, 2007; Creswell, 2016).

Once the introduction is completed, the interviewer begins the semi-structured interview by asking an ice-breaker question (Creswell, 2016). The objective of this ice-breaker question is to start developing rapport with informants and increase their confidence in their ability to answer questions easily (Carol A Bailey, 2007; Creswell, 2014). Several probes questions are also prepared in advance and written down in the interview guide so that the interviewer remembers to follow up and ask for more information (Creswell, 2016). At the end of the script for the phone interview, the researcher follows Creswell's recommendations (2016) and asks informants "Is there any further information you would like to share that we have not covered?" (p.132). This question empowers informants to add anything else they feel should be considered by the interviewer.

After informants answer general questions about their transformative tourism experiences, the researcher invites them to share their answers to the sentence completion task. The interviewer asks further probes after each completed sentence to understand why the specific words are selected as well as the meaning attached to them. The last step is the drawing activity, which also includes probes so that informants can share more detailed information about their drawing. Lastly, the interviewer concludes the phone interview by thanking the informants, restating that confidentiality is maintained through the study, and explaining that a copy of the transcript will be sent via email to check for accuracy (Creswell, 2016). The whole process lasts from 30 to 45 minutes.

Approach Used for Data analysis

An issue that requires some thoughts from researchers interested in using multiple projective techniques is to decide how the data is combined and interpreted (Catterall &

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Ibbotson, 2000). For researchers to increase the validity of their study it is crucial for them to justify how the data generated by multiple projective techniques is analyzed and combined into a coherent whole (Creswell, 2014). In his methodological guidelines, (Creswell, 2014) argues that the richness of using a multi-methods approach becomes lost if researchers do not address both the convergence and the divergence between the databases. He also explains that researchers should not simply to state those divergences but actively research why they are occurring. As a solution to those issues, we follow the guidelines set up by Caracelli and Greene (1993) to enhance validity when using multi-methods approach by focusing on 1) typology development (with open and axial coding) and 2) data consolidation.

During the typology development, each database (i.e.; drawings, sentence completions, and interview transcript) is coded individually (Caracelli & Greene, 1993). To proceed to typology development all data is saved under an electronic format (Nurkka et al., 2009). The electronic software NVIVO is used to organize the data effectively by tagging each answer to an informant's ID. Each drawing is scanned, the answer to the completion sentences is typed out, and each transcribed audio file is uploaded into NVIVO. The date is organized into the system by questions and the researcher starts the coding process by looking at one question after another (Nurkka et al., 2009). The reason behind this very specific organization is that researchers might feel overwhelmed by the quantity of data generated by both projective techniques and in-depth interviews so stepwise approach is more effective (Kubacki & Siemieniako, 2017). By working their way through the data question by question, researchers are able to break the data into manageable pieces, compare the informants' answers more easily, and see codes emerge more clearly (Nurkka et al., 2009).

Concerning the coding process itself, the researcher follows the approach outlined by Bailey (2007) which includes open coding followed by axial coding. Under this approach, the

researcher first engages in open coding and immerses herself into the data by repeatedly reading the material. It is important to note that the process of open-coding for visual and textual data is slightly different (Creswell, 2016). For the open coding process of textual data, the answers given by the informants for each question is read line by line by the researcher (Carol A Bailey, 2007; Creswell, 2016; Nurkka et al., 2009). The researcher uses brackets to divide the textual data into smaller pieces and she assigns codes are assigned to those pieces of text (Bailey, 2007; Creswell, 2016). For the open coding of the visual data, the researcher writes down a description of each drawing (Creswell, 2016). Using NVIVO, elements within the drawing are tagged (e.g.; facial expression and object drawn on the floor) and a code is assigned to each tagged element (in principle, this process parallels dividing paragraph into smaller chunks of text as it is commonly done in textual analysis). The assigned codes are stored into an NVIVO worksheet. Next, the researcher focuses on the connotations behind each drawing (Creswell, 2016). As part of this focus on connotations, each connotative element in the drawing is tagged and is assigned a specific code (Gamradt, 1995). For this step, it is important to recall that the informants are also asked to directly interpret their drawing during data collection (Gamradt, 1995). This interpretation is transcribed like the other contents of the in-depth interview. In other words, the interpretation shared by informants is coded like other textual data (Creswell, 2016).

The next step of the coding process includes axial coding which is similar for textual and visual data (Bailey, 2007; Creswell, 2016). For the axial coding of textual data, the researcher regroups the codes that have emerged during the initial coding into themes. Those themes are built by combing codes that are tapping into the same conceptual idea (Bailey, 2007). During axial coding, the researcher also works on leaning the codes by combining redounding and overlapping ones (Bailey, 2007; Creswell, 2016).

The last step is data consolidation where the researcher merges the themes that have emerged from axial coding into over-arching themes that stretch over the different databases (Carol A Bailey, 2007; Creswell, 2016). Through those over-arching themes, the researcher regroups and discusses the commonalities of the data. The over-arching themes allow for a cross-analysis of the materials collected via a multi-methods approach (e.g.; quotes, sentence completions, and drawings). Finally, those overarching themes are then used to build a framework that visually depicts the connection between the themes and their theoretical relevance.

Trustworthiness and validity

Trustworthiness is assessed through the four criteria developed by Decrop (1999b): credibility, transferability, dependability, and confirmability. Credibility is concerned with whether the findings can be qualified as truthful (Decrop, 1999b). Credibility is addressed through referential adequacy which means that we provide detailed information that allows readers to understand the context in which the data collection has occurred (Goodson & Phillimore, 2004). To provide good referential adequacy in the present study, the interviewer writes detailed descriptions of her interactions with informants to share the richness of the context (e.g., the tone of voice used by informants, gestures, and use of humor) (Maxwell, 2012). Credibility is also reinforced by member checks as informants are sent a copy of the interview transcripts to review and edit (Creswell, 2014). This review ensures that their voice is accurately being transcribed. As part of the phone interview, informants are sharing their own interpretations of their drawings and the researcher asks them if they feel like their drawings are representative of their transformation. Table 2 contains quotes that directly illustrate the validity of the drawings. The use of this validity question helps to ensure that the researcher is not imposing her own biases into the drawing.

Table 2. Drawings: validity check

Interviewer	Does your interpretation of the drawings effectively reflect the changes that have occurred?
Sample answers from Informants	*Yes. It's was actually a good idea to do the drawing because in a way it shows it a lot quicker.*
	Yes definitely. It is kind of like my drawing makes me think of my five year old self, the level of happiness that I had was simple, it was just a simple happiness.
	Yes, I felt that it was very fitting to my experience because my experience was so unique. It forced me to be in touch with a part of myself that I am not used to be in touch with.
	Yes. It's also good to have some guidelines because at first I was thinking "I just have to draw a picture of myself, like how am I going to draw myself?" But I think having the items it's helpful to think about how I will represent myself.
	Yes, it was a really good exercise. I'm glad that I got to, it gives you a good visual to see the differences. I like the symbol in it. And I think if I were just writing that down, it might not be understood so vividly.
	Yes and I really stop and consider, "oh, well, what was this really about?" I thought it actually made it easier to show my feelings. It would have been very cliché if it wasn't drawn.

Transferability looks at whether the findings of the study can be reasonability transferred to other contexts, locations, and/or groups (Decrop, 1999b). In the present study, transferability is enhanced through theoretical saturation and thick descriptions (Creswell, 2014; Goodson & Phillimore, 2004). Theoretical saturation occurs when the researchers continue to interview additional informants until the insights collected start to get repetitive and no new ideas are mentioned by informants (Creswell, 2014; Marshall & Rossman, 2016). Thick description is defined by Goodson and Phillimore (2004) as being "concerned with describing the data extensively and compiling them in an orderly way so as to give other researchers the opportunity to appraise the findings" (p.161). Following this recommendation, the researcher keeps all of the data organized through the use of the NVIVO software and saves the different versions of the coding scheme so that there is a trace of how the codes have emerged and evolved through time.

Dependability focuses on whether the findings can be qualified as being consistent and enough information is provided so that they could be reproduced in subsequent studies (Decrop, 1999a). Dependability is strengthened through the use of second opinions and audit trail (Creswell, 2014, 2016; Marshall & Rossman, 2016). To foster dependability, the researcher shares the themes and supporting quotes with co-authors to engage a discussion about the interpretations of the data until conclusions are reached. Dependability is also enhanced through the use of an audit trail which is a journal in which the researchers enter logs about the entire process of data collection and analysis (Creswell, 2016; Marshall & Rossman, 2016). The end goal of the audit trail is that if the data is to be reviewed by an external auditor, this auditor should be able to understand how the whole analysis took place and reach similar findings than the researcher (Creswell, 2016).

Confirmability assesses whether the findings truly reflect the voice of the participants and are not the results of the researchers' own biases and prejudices (Decrop, 1999a). In the present study, confirmability is enhanced by engaging in self-reflection and looking for disconfirming pieces of evidence (Maxwell, 2012). Engaging in self-reflection entails keeping a journal in which the researcher thinks about how her own background, biases, opinions, beliefs, and principles could have impacted the study (Creswell, 2014). By looking for disconfirming pieces of evidence, the researchers play the 'devil's advocate' and actively search for any clues in the data that might contradict the findings (Marshall & Rossman, 2016; Maxwell, 2012).

In addition to the use of the four trustworthiness criteria, validity is reinforced through the principle of triangulation (Decrop, 1999b; Goodson & Phillimore, 2004). The present study enhances validity by using four different types of triangulation: data triangulation, method triangulation, theoretical triangulation, and investigator triangulation (Decrop, 1999b; Goodson & Phillimore, 2004). Data triangulation occurs because the study relies on several forms and

sources of data (i.e.; visual and textual data) (Goodson & Phillimore, 2004). Method

triangulation takes place because different methods are used to gather the data (i.e.; projective

techniques and in-depth interviews) (Goodson & Phillimore, 2004). Theoretical triangulation is

managed as because different theoretical lenses are used to interpret the data, explore alternative

explanations, and discuss the findings in light of those different theories (i.e.; transformative and

interaction ritual chains theories) (Goodson & Phillimore, 2004). Finally, investigator

triangulation occurs because more than one researcher is looking at the data analysis (Goodson &

Phillimore, 2004; Marshall & Rossman, 2016). More precisely, the Ph.D. candidate shares the

themes and key codes generated by her analysis with the Chair of the Committee who provides

her with recommendations with regards to the data analysis. This process is also known as "peer

debriefing" (Creswell, 2014; Marshall & Rossman, 2016). In the present case, the co-authors act

as a peer de-briefers by reviewing the emerging themes and asking questions about the Ph.D.

candidate's reasoning and analysis.

Pilot study

During the pilot study, the interview questionnaire and worksheet are pilot-tested with a

group of transformative travelers. The objective to refine both documents and improve the

quality of data collected for the final data collection. The sample of informants is composed of

undergraduate students from a large southeastern university who have taken part in a self-

described transformative tourism experience. Their transformative travel experience all result

from their participation in either a university-sanctioned study abroad program or an alternative

spring break focusing on volunteering abroad. Informants are recruited via an introductory email

which explains the purpose of the study, the activities (sentence completions, drawings, and in-

depth phone interview questions), and the estimated completion time. The introductory email is

sent by the contact person at the university responsible for study abroad and alternative spring

break programs. If interested in participating in the study, informants are invited to contact the main researcher directly via email. The main researcher then shares with them the interview worksheet and the date is set for the phone interview.

A total of 15 informants participate in the pilot study and share their insights about both their transformative experience and the research design. Based on their suggestions several changes are made to the interview worksheet and in-depth interview questions. For example, one informant shares that the guidelines in the interview worksheet do not clearly state that informants are the ones interpreting their drawings. She judiciously explains that researchers can assign any meaning to drawings and that she feared that the meaning of her drawing might be manipulated and presented misleadingly. To make sure the guidelines in the interview worksheet are clear and avoid any confusion the following sentence is added: "You will be the one interpreting and giving meanings to the sketches by describing/explaining them during the phone interview."

Another change is implemented concerning the interview questions. The following question creates confusions in informant: "When you are talking about your trip to a friend, what are some key images, symbols, and stories that you use? Why?" For example, one informant asks what does the interviewer means by the word symbols. Another asks if the interviewer can share an example of a symbol or an image. To avoid confusion, this question is reworded as followed: "If a friend was thinking about taking a trip similar to yours what would you like him/her to know?". The main research notices that by reducing the level of specificity of this question, informants feel less confused and naturally share powerful symbols and narratives that they would like their friends to be aware of when thinking of taking a transformative trip. The Appendix contains the final set of questions for the semi-structured interviews as well as the

interview worksheet with the definitive list of sentences for the sentence completion task and the guidelines for the bubble drawing task.

Thus, this pilot studies help the researchers to refine both the interview worksheet and questionnaire.

Findings

Research question 1: How are transformative tourism practitioners viewing marketing symbols and narratives?

With the first research question, the objective is to gather practitioners' insights concerning the importance of symbols and narratives in creating marketing content as well as discuss any additional challenges they face when trying to attract more travelers to purchase transformative tourism experiences.

Informants are transformative tourism practitioners who are invited via email to take part in a fifteen phone interview. Practitioners are found using the same method as the one described before to identify transformative tourism organizations. A total of twenty transformative tourism practitioners take part in the pilot study (Table 3). All informants have been given aliases to maintain confidentiality. Phone interviews are not audio recorded but notes are taken about the key information shared by those transformative tourism practitioners.

Table 3. Descriptive information about practitioners

Aliases	Job Title	Organization's Headquarter Location	Organization's Status	Focus of the Transformative Tourism Programs	Established In
Austin	General Manager	Asia	For-profit	Cultural Travel	1974
Allison	Co-Founder	Oceania	NGO	Cultural Travel	2013

Bart	Program Director	North America	For-profit + Foundation	Adventure Travel	1985
Caleb	Chief Executive Officer	North America	For-profit	Consulting firm	2013
Belinda	Executive Director	North America	NGO	Volunteer Tourism	1975
Camila	Executive Director and Co-Founder	Oceania	NGO	Cultural Travel	2013
Damien	Founder	North America	For-profit	Adventure Travel	1990
Evan	Founder	North America	NGO	Volunteer Tourism	2006
Fred	Founder	North America	For-profit	Adventure Travel	1986
Davina	Founder	Oceania	For-profit	Study Abroad	2008
Erin	Expedition leader	Europe	For-profit	Adventure Travel	1987
Faith	Program Director	North America	NGO	Volunteer Tourism	1986
Grace	Founder	Africa	For-profit	Cultural Travel	2005
Grant	Founder	Asia	For-profit + Foundation	Adventure Travel	1999
Harry	Founder	North America	For-profit	Adventure Travel	2017
Ian	Director and Expedition Leader	Europe	For-profit+ Foundation	Adventure Travel	2015
Hazel	Executive Director	North America	For-profit + Foundation	Cultural Travel	1978
Ivy	Program Manager	North America	Non-profit	Volunteer Tourism	1985
James	Expedition Leader	North America	For-profit	Adventure Travel	1987
Johana	Co-owner	Europe	For-profit	Adventure Travel	1972
Kip	Marketing Specialist	Europe	For-profit	Adventure Travel	1972

The questions follow a semi-structured format in which the interviewer first explains the objective of the study and the research questions. Transformative tourism practitioners are asked to share their impressions about the topics covered in the study and their possible relevance for practitioners. Next, the interviewer asks questions related to the symbols and narratives used by transformative tourism practitioners to represent their organization and potential challenges faced when creating marketing content.

One key finding from these interviews is that transformative tourism practitioners express that the research questions examine issues that are crucial and relevant to them. For example, James, Fred, Grace, Hazel, and Caleb state the study investigate key issues for their company:

Actually, you're asking questions that all of us who are involved in this asked... These are the most important questions, your research will be really interesting and of interest to people in the business.

James, Expedition Leader, Transformative tourism organization with a focus on adventure programs

The topic of your research is just something that is top of mind for us. We got to figure out how do we appeal to the senses and the desires of our potential guests while having them engage with our company at a brand identity level?

Fred, Founder, Transformative tourism organization with a focus on adventure programs

We have not created the storytelling material to serve the organization. I would say it's on our plate… It will educate us about their [the travelers'] needs and serve them better.

Grace, Founder, Transformative tourism organization with a focus on cultural programs

We think constantly about how we portray ourselves, how we fit in the marketplace as a whole.

Hazel, Executive Director, Transformative tourism organization with a focus on cultural programs

More specifically, Caleb adds that transformative tourism needs to be studied because the tourism industry as a whole is under more scrutiny and transformative tourism offers a solution for consuming more mindfully for the benefit of the planet:

I think we are moving into an era where travel is going to be under much greater scrutiny... Our industry is going to be looked at with all the negative cultural sustainability aspects and the drawbacks of flying from an environmental perspective… Whenever that happens, one has to really determine whether this is valuable for the people and the planet. I think transformational travels and ensuring benefits to the community are going to move more into the forefront.

Caleb, Chief Executive Officer, Transformative tourism organization with a focus on adventure programs

Transformative tourism practitioners also reveal that they are acutely aware of the importance of symbols and narratives to develop marketing content for transformative tourism. For example, Allison, Bart, Camilla, Damien, Davina, Fred, Hazel, and Ivy actively seek to create powerful symbols and narratives when deciding on their organization's name, logo, color scheme, pictures, and even their partnerships decisions:

We chose our name to shows that we feel like we are part of the community because we do really see our company as a community of travelers, tourism businesses, academics and partners around the world sharing this vision that tourism can be a force for good if it's done properly.

Camilla, Executive Director and Co-Founder, Transformative tourism organization with a focus on cultural programs

Our name is based on the symbolism and joyful feeling that you have when you realize the world is quite small. We are all connected even if we are quite different... This is a way for people to understand that it's a physical journey and an internal journey as well…Our logo came from a painting by a local Aboriginal artist that we saw… We like the idea of supporting an Aboriginal artist. So we approached him and said, "can we commission you to use your painting as our logo?"…The logo represents the world in the summertime...The fact that it was designed by an Aboriginal person underscored the importance that we are putting on connecting with the Aboriginal community here… For our photos, we like to show diversity in both genders and races to show that we can cater to everyone… we're also not advertising something that doesn't exist. And that's true with our video as well…we could have pay money to have a really slick looking video that has been done professionally but instead, we have videos that are a bit shaky and grainy. To me, that's important because people say, "Oh, that's the real thing."
Davina, Founder, Transformative tourism organization with a focus on cultural and adventure programs

Our logo is a Mandala, it symbolizes three circles that are designed to represent the three pillars of our organization: economic development, social empowerment, and environmental protection… Mandalas are circular, there's no end. A mandala is like a constant process and we wanted to be associated with that…In certain cultures, mandalas are connected with the community, they're done as a collective, and seen as an act of humility. They represent creating a mental expansion. They're stunning and beautiful… Our whole color palette is using greens and earth tones to symbolize environmental protection and health.

Allison, Co-Founder, Transformative tourism organization with a focus on cultural programs

Our logo symbolizes a mountain and there is a door to show that we're trying to be a window into the world… By traveling with us, you are really going into a new world.

Damien, Founder, Transformative tourism organization with a focus on adventure programs

Our logo is symbolic of the breadth of our company and the diversity of trips we do. In addition, we wanted to give a little bit of a reference to early US National Park days with the coloration and the font...We wanted to portray this idea of the good old days of conservation and exploration.

Bart, Program Director, Transformative tourism organization with a focus on adventure programs

Our color palette symbolizes and is withdrawn from our environment. We have a navy blue color, a turquoise color, and a salmon color… We do have specific symbols and guidelines in terms of our brand identity and partnerships… we've partnered with a local indigenous organization for decades, mentoring youth in our community and providing them with apprenticeships… we have a program helping kids who want to become mechanics... it has always been an important part of our business to be present in the community.

Fred, Founder, Transformative tourism organization with a focus on adventure programs

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We are always trying to choose photos that are high-quality photos… sometimes that

means showing a picture with another traveler in it so they can imagine what it looks like

for a traveler to experience that place. And sometimes it means showing a place without

any travelers in the picture so that they can imagine feeling very solitary, remote,

unspoiled, and undisciplined.

Hazel, Executive Director, Transformative tourism organization with a focus on cultural

programs

We don't want photos to be altered… we want to make sure that we are actually

providing an outlook of a very realistic and intimate experience.

Ivy, Program Manager, Transformative tourism organization with a focus on

volunteering programs

While transformative tourism practitioners recognize the importance of symbols and

narratives, several of them express concerns about certain imageries related to explorer. As

previously mentioned, symbols that are related to explorers are used in the tourism literature to

depict the travelers' transformative experience (Robledo & Batle, 2017). However,

transformative tourism practitioners express concerns that symbols related to explorers do not

focus enough on the community. Allison and Fred explain that symbols related to explorers can

be problematic when there is a lack of community inclusion in marketing content. Symbols

related to explorers can be negatively associated with narratives and imageries related to

colonialism, white privileges, lack of women representation, and even voyeurism:

People come back and they're like "Oh my gosh, I just feel they were so poor, but they

were happy." It is a very simple narrative and this is really problematic... I always think

it is important to think of white privilege, how we present our trips, and share that in a

way that respects the agency of the communities, encourages positive language, and

offers an accurate portrayal - meaning that every situation is complex… It is totally fine

to talk about poverty but as an industry, we need to be mindful of our language.

Allison, Co-Founder, Transformative tourism organization with a focus on cultural

programs

Fred makes the following comment about his organization's logo that depicts a traveler as an explorer:

We do consider how colonial our brand does seem especially to indigenous people. This

is a hot topic right now amongst us in the company, to sort of acknowledging that our

guests have that sort of connection with the themes discussed in the Odyssey… Our

guests may not understand the nuances that are that we are dealing with in terms of

reconciliation with our indigenous people… How do our indigenous partners feel about

this super colonial logo that we have?... We try to make the character in the logo,

androgynous and you can't tell if it's a male or female but it is harkening back to these

classic tropes of imperialism and colonial exploration.

Fred, Founder, Transformative tourism organization with a focus on adventure programs

Similarly, Bart talks about the misunderstanding that symbols related to explorers and luxury safaris can engender and the importance of clearly stating what is meant by being an explorer in a transformative tourism organization's content marketing:

In our marketing materials, we set expectations about what we think we are actually

delivering on the trip… Essentially it's a high-end luxury Wildlife Safari experience. Our

definition of luxury is much more about the sense of place and getting further out there.

It's not about the niceties, claw foot, bathtub, and things like that… for us being an

explorer mean that there is going to be a certain air of unpredictability and

excitement…Safari vehicles get flat tires, planes are going to get delayed, things are going to happen that we can't totally predict. But it's an adventure mindset… And when everybody else rolls with it and goes with the flow of adventure, we're going to get rewarded so much for it because we're getting it further out there.

Bart, Program Director, Transformative tourism organization with a focus on adventure programs

When identifying potential symbols and narratives to include in their marketing content, transformative tourism practitioners face several challenges. For example informants, such as Fred mentions that it is difficult to identify partners that match the narratives and symbols of his organization:

At first, we had a rough time identifying what we felt was the best social cause in the community to make available as an option for our guests to remain invested in our destination and become involved in local social/environmental causes.

Fred, Founder, Transformative tourism organization with a focus on adventure programs

Another issue is that transformative tourism practitioners are facing difficulties in finding a marketing firm that understands and create marketing content that fits with the transformative nature of the proposed travel experiences. For example, Camilla and Johana state:

We wanted to really develop our brand and have a logo that we can then incorporate in all aspects of our work… We actually had one designer come up with a whole bunch of options but we didn't like it.

Camilla, Executive Director and Co-Founder, Transformative tourism organization with a focus on cultural programs

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We started working with a marketing firm, and they changed everything: the scheme,

colors, and logo. I guess they wanted it to be more serious and sophisticated. We fired

them by now. I'm sure that this was a permanently correct choice.

Johana, Co-owner, Transformative tourism organization with a focus on adventure

programs

Organizations that have non-profit status are facing additional challenges when creating

marketing content because they have low financial resources and have to answer to the demands

of the boards. For example, Evan states:

There's a conflict that I'm having because as a small organization we don't have a

dedicated marketing person… It's almost off-mission to spend marketing money, but at

the same time, we have to because we need those volunteers…myself and the staff, we

develop new logos, names, and everything. This logo had a family holding hands and

some nature in the background and I thought that it was actually great… but this logo

was turned down by the board…They said no because I think what they were still in their

minds very much on science and research. There were a bunch of academics professors

on my board at the time. They said, "No, that's not going to happen."

Evan, Founder, transformative tourism organization with a focus on volunteering

programs

The transformative tourism practitioners also express diverging opinion concerning what

is the best strategy to attract potential travelers in their marketing content. While some

transformative tourism practitioners actively desire to include references to transformation in

their marketing content, others fear that any reference to a life-change and/or a transformation is

dangerous because transformation is not a guarantee and/or claims of transformation do not

resonate with their clientele. For example, Fred explains that his company does not refer to

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transformation in their marketing content and trick their guests by promoting other elements of the trip. He worries that promoting transformation is risky because it is not always a sure outcome for travelers:

I'll tell you what we trick our guests… We market the trip based on the romance of locking your gaze with a wild polar bear, or kayaking amongst hundreds of beluga whales, or dining under the Northern Lights… On the front end, we may be tapping into the romantic elements of transformational travel, but we don't really frame it as "prepare to have your mind and your life never to be the same again" …We want them to remain spellbound and not to have to worry about the minutiae of travel. And then that is when a guest can be in the place where they can let down their guard and really soak up their surroundings… They can enter into this frame of mind where they can think about transformational elements of their trip and how it will, hopefully, affect their lives.

Fred, Founder, Organization specialized in transformative tourism with a focus on adventure programs

Similarly, Erin and Grant feel that reference to transformation might not be interesting to potential travelers:

I don't think that we would get as much of a response from participants by saying "This is going to have like a lasting impact of your life. You're going to view the world differently" than we would be marketing the trip like "Come have a good time, do something different from your friends".

Erin, Expedition Leader, Transformative tourism organization with a focus on adventure programs

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I don't think a lot of people will be coming if I say "your life will change" and "you're going to change your outlook on being"

Grant, Founder, Transformative tourism organization with a focus on adventure programs

Further, James feels like marketing content focusing on transformation is not specifically attractive to retirees. Rather, he mentions the importance of taking a more subtle approach by referring to the travelers' inner desires:

That is not a selling point for seniors… when you reach 65- 75, the last thing you are interested in is transforming your life... I take a much more subtle approach…. If you use their interest, their deeper desires, you can then leverage some kind of transformational experience -- even though this is not what they were explicitly looking for.

James, Expedition leader, Transformative tourism organization with a focus on adventure programs

James' quote also suggests to the potential offered by symbols and narratives to tap into those unformulated desires. However, other practitioners openly include references to transformation in their marketing content. They feel like the focus on transformation is what sets them apart from competitors. Bart and Harry actively use references to transformation in their marketing content as a way to attract and select travelers that fit their organization's values. They want to attract travelers who believe travel can be used as a force for good:

We're kind of upping the ante. ..We are using all these examples and lessons on the trip to show the guests that this is a special type of conservation travel trip where their actions and decisions matter…We are doing this to protect the animals, protect the environment, and hopefully so that all of our grandkids, and their grandkids, can enjoy nature and the beauty of the world for many, many years to come… We try to portray all that in our

marketing… we try to put that out there…it's actually really important to get the right kind of clientele on our trips.

Bart, Program Director, Transformative tourism organization with a focus on adventure programs

Marketing is so important because of setting expectations, getting the right kind of clientele, and allowing clientele to self-select for the right company… In our marketing materials, we set expectations of what we are delivering on the trip… Again, it's all about selling trips to the right person and be extremely transparent about what we can do and what we can't do… We will dissuade people from traveling with us if we feel that they can do what they want to do better with a different company because we want the right people on our trips...When they feel that they are the right person on our trips, they're going to come back time and time again.

Harry, Founder, Transformative tourism organization with a focus on adventure programs

Hazel believes it is crucial to refer to transformation and to show how her transformative tourism organization is setting high standards in term of being socially and environmentally responsible at the destination:

The big difference from when our company started 40 years ago is that we are competing for more than an experience… It's the defining reality of the marketplace today … We want something that pushes you beyond that every day…something that pushes you outside of your comfort zone, outside of the realm of the typical experience, and takes you to a zone of discovery and adventure, experiencing a place in a deeper way.

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Hazel, Executive Director, Transformative tourism organization with a focus on cultural programs

In conclusion, the pilot study reveals that the topic of the research is relevant to transformative tourism practitioners. Those practitioners also struggle with hiring competent marketing firms and financing research concerning marketing content for transformative tourism organizations. The practitioners reveal that they have very different approaches when it comes to mentioning transformation in their marketing content. Therefore, there is a need to investigate how and in what ways transformative tourism narratives are symbolized by travelers.

Research question 2: How and in what ways are transformative tourism narratives symbolized by travelers?

Interviews and projective techniques completed by transformative travelers reveal three major over-arching themes that emerge from the travelers' sentence completions, drawings, and in-depth interviews: 1) develop powerful human connections, 2) gain and defend new perspectives, 3) act as a Transformative Energy Star. Each of the themes is discussed below and analyzed using the combined lenses of the Transformative and Interaction Ritual Chains and Transformative theories.

Develop Powerful Human Connections

The aspiration for powerful human connections emerges as a key theme for transformative travelers. Human connections are central to the Interaction Ritual Chain theory under the ritual outcome of group solidarity (Richards, 2015). Group solidarity occurs when individuals feel like they are included in a group (Collins, 2016). This finding also expands the work of Kirillova et al. (2017c) who suggest that unity with others act as a catalyst for transformation. Transformative travelers explain that this feeling of group solidarity takes on a multiplicity of

forms in their transformative experience all connected to an aspiration for powerful human connections. Indeed, four sub-themes emerge surrounding the theme of aspiration for powerful human connections between travelers and 1) their own origins, 2) family unit, 3) destination residents, and 4) fellow travelers.

Expanding on Cui (2018) and Santos and Yan (2010), a novel finding is that transformative travelers experience group solidarity via powerful emotional connections with their roots and ancestry. Connection to ones' origin creates a feeling of group solidarity that shakes transformative travelers to their very core, transforms their view of self, and fosters cultural pride. This connection to one's ancestry is clearly visible in the symbols and narratives of Helena. As a child, Helena was bullied because of her Irish heritage but a trip to Ireland with her husband triggers a powerful feeling of belonging and a sense of pride in her origin. Interestingly, Helena is first struck by the physical similarities between her and Irish people when she sees that people walking in the street have the same red hair. The presence of this visual stimulus confirms Sterchele's (2020) proposition that senses play a key role in group solidarity outcomes of the Interaction Ritual Chain Theory. As travelers go through a transformative experience, their visual sense are heighten and allow them to record vivid memories of their connection with others. Helena shares the powerful effect that this visual stimulus has on her because she was bullied as a child for her red hair and the Irish heritage it represents. This powerful connection with her origins and the group solidarity outcomes generated by the transformative experience transpire in Helena's interpretation of her drawings (Figure 2):

> *In the before picture, I am fairly small and surrounded by bigger people who do not look like me. When I grew up, there were not many red-haired people. So as the Irish kid, I stuck out with them and I was somehow less than them. That continued through high*

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school. Someone told me that I should not take an advanced placement class because I'm

taking the seat of someone who was probably going to go to college and I probably

wasn't. So that was just kind of the whole attitude I grew up with. And you know, when

*you're a kid, you kind of believe what happens around you.*

My clothes are nondescript, I have a book in each hand. What is at my feet is a pile of

books because I was a very withdrawn kid. As a matter of fact, I went on to become a

librarian because the librarians were so good to me in my childhood. And my bubble says

"I don't belong here."

The single most powerful moment of the trip was when we just got to Dublin and we were

walking down the street. And so many people look just like me, it was mind-boggling. I

just kept thinking that I saw my cousins at the corner. It was unbelievable. I was

overwhelmed and see so many people who looked like me. It is like, "Wait a minute, I

have a whole tribe. And I have a place in the world that I can claim and I can go

anywhere I want." It was very powerful.

In the after picture, I am the same size as everyone else. I am smiling, which I was not in

the first picture. In the before drawing, people don't look like me but here lots and lots of

them do. I am wearing a dress with a shimmer clover on the front because I am feeling

both lucky and Irish. I'm holding a bag of wool. I still have a pile of books at my feet. And

in the bubble, I am saying "I have met my people. Everybody has people. I can travel as

far as my dollars take me." I was way more comfortable in my skin. I wanted to make

sure my kids knew that, wherever there were, they had every right to be there and they

belong there.

Helena, 71, transformative trip to Ireland

Figure 2. Helena's drawings

Helena's before drawing	Helena's after drawing
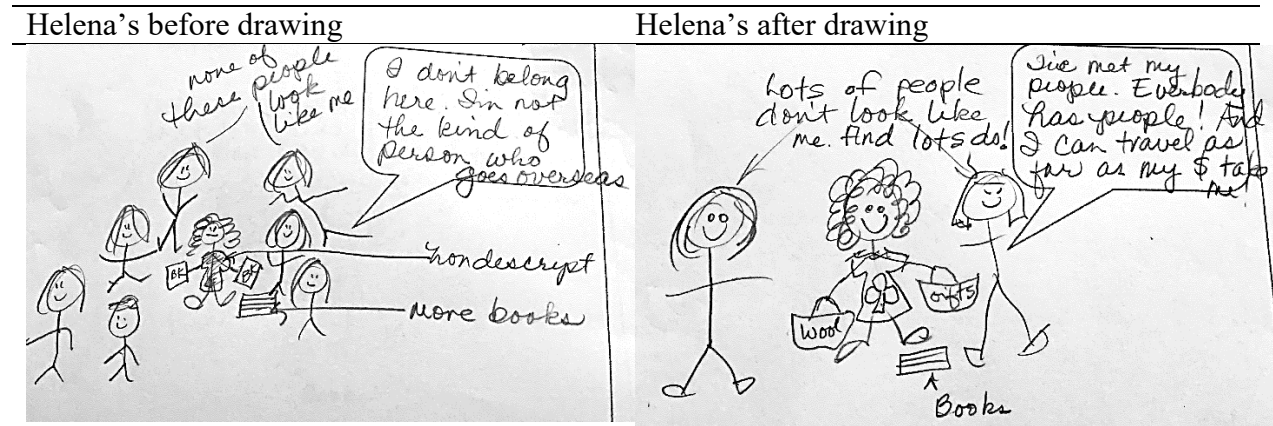
Undoubtedly, Helena's narrative reveals a wealth of symbols linked to her transformation such as smile, Irish clover, height, and voluptuous hair. Helena's answer to the sentence completion task reinforces the importance of those visual stimuli have in creating group solidarity when she references that everything becomes brighter:

> *If this is trip was a fairytale of a folk story, it would be Cinderella because it was so transformative. I was the stepsister that did all the work. And then all of a sudden I was the princess. Not that I was literally a princess but everything was just so different and brighter.*
>
> *Helena, 71, transformative trip to Ireland*

Group solidarity also emerges through the transformative travelers' connection with their family. While Germann Molz (2016) focuses solely on transformative travelers families in the context of volunteer tourism, the present study suggests that connections with one's family offer an interesting angle to market transformative tourism to a broader population of potential clients. This finding also supports the proposition of Harrist, Henry, Liu, and Morris (2019) that group solidarity reinforces the resilience of family members. For example, Charlotte and Daphne explain that going through a transformative experience as a family unit, not only bring them closer together but also reinforced their family resilience. This resilience is visible in Charlotte's

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interpretation of her drawings. In her before drawing, Charlotte draws herself alone, there is no depiction of her family while in her after drawing Charlotte is surrounded by love. Going through a transformative experience as a family fosters group solidary and allows Charlotte to become more resilient about the geographical distance separating her from her loved ones (Figure 3):

> *We needed time together. We live in different places. My daughter lives in New York, my son in Austin, I live in Houston, and my husband lives in Dallas. It was very special to all be together, we were so happy. I realized that my kids can go off and we still have time as a family. I draw hearts for love. My luggage is carrying all the love. The memories of being together are very important to me. I am so emotional right now just drawing and thinking back about this trip.*
>
> *Charlotte, 55, transformative trip to Yellowstone, USA*

Figure 3. Charlotte's drawings

Charlotte's before drawing	Charlotte's after drawing
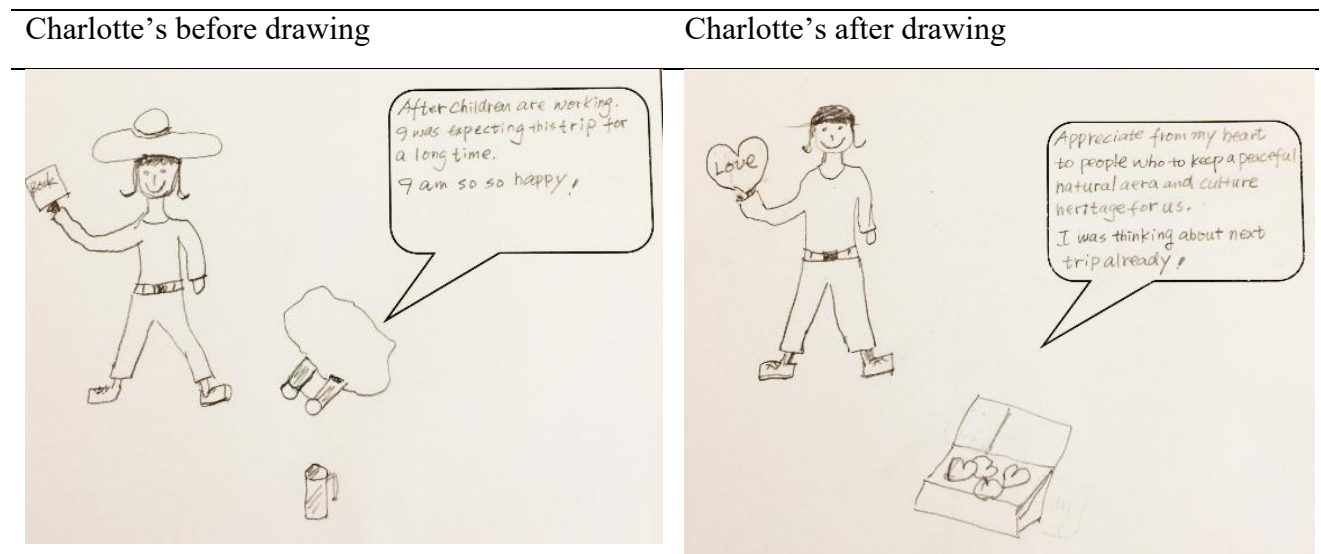
In the same way, Tiffany explains in her interpretation of her drawings how her transformative experience brought her closer to her family, experienced group solidarity, and helped her reflect

on her place in the world. She uses the symbol of hearts to express these connections as well as draw a globe to represent her new view of self (Figure 4):

> *When I look at my before drawing, there's the world outside and I'm getting ready to go out the door. This was hard for me to do. In my hand, I have my passport. I have a lot of questions, love, and excitement. In my after drawing, what I am wearing is something that my friend Anna gave me and it's called a two-yard. It's one of those fun things now that has a symbolic meaning for me because you can wrap yourself in it, you can lean on the floor in it, and you can use it to carry things in. I came back extremely tired but also with much more of an open mind. I think it's just realizing once again, how little I know in the whole scheme of things. The hearts, under the bubble, are about my parents who have died many years ago and my grandparents who I never met. My parents love to travel. I felt like, I was carrying them with me. My grandparents, on my mother's side, were immigrants. And so I think I have this sense of wanting to see the world maybe because of that. In the bubble, I wrote one of these things we say quite often in my family "it seemed like a good idea at the time" but then I needed the rest. And then okay let's go again.*
>
> *Tiffany, 70, transformative trip to Ghana*

Figure 4. Tiffany's transformative experience in Ghana.

Tiffany's before drawing	Tiffany's after drawing

Similarly, the importance of family unity and resilience is present in Daphne's answers to sentence completions when she uses the symbols of feather, gift, and unicorn:

> *If this trip was animal it will be a penguin. For penguin families, there is a sense of duty and responsibility to each other as a unit. I mean, my family is pretty close, we express exactly how we feel. Anger is pretty short-lived because we say it. And this trip was even more unifying. And that's definitely what I think this trip did for us. It was a gift. There didn't need to be a lot of words... It was a safe, very safe, and a soulful thing.*

> *If this trip was a magical creature, it would be a unicorn because I think of the simple magic of the family experience. There was nothing about this experience that was artificial. So if it is a fantasy, let's make it all the way and we're talking unicorn.*

> *Daphne, 40, transformative trip to Chile*

Building on DeCrop et al. (2018), destination residents are also actively helping transformative travelers to experience group solidarity and a feeling of belonging in the destination. Group solidarity via connections with destination residents is central to the narratives and symbols shared by Andrew, Brianna, Francine, Bradley, Gwen, and Heather. For example, Andrew shares

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how connections with destination residents helped him fill a spiritual void. In his before drawing, the wall symbolizes the social isolation he was feeling while the after drawing depicts him experiencing group solidarity as he is connected through the heart to a new global community. Andrews interprets his drawings as followed (Figure 5):

In the before drawing, I put myself at the desk. I did a lot of reading and just online surfing where I got a lot of inspiration about different countries and different cultures. The bubble above shows some parts of it as spirituality. So this is basically me getting inspired. I'm not really feeling full or like happy. And on the floor I put more books because it's basically endless, you never know what's out there. To the right, there is a wall but it is not drawn with clear marks. This is sort of an invisible wall between me and the people around me because of different views. I think the words that put in the bubble are sort of self-explanatory.

In the after drawing, I have my backpack on. I hold my computer in my hand which is also quite important to me because it makes me very independent as I work remotely. My heart is healed and it's connected to people. There's no wall anymore. I don't feel like a stranger to people. I'm also connected with the heart of others. I call the whole world my home now even though I haven't completely discovered it yet but I feel globally connected. The things that were before in that bubble, kind of far away and that I was dreaming about, are now present. I feel more connected to the universe. I think I became more confident. I share this contentedness and energy with people.

Andrew, 25, transformative trip to Nepal

Figure 5. Andrew's drawings

| Andrew's before drawing	Andrew's after drawing
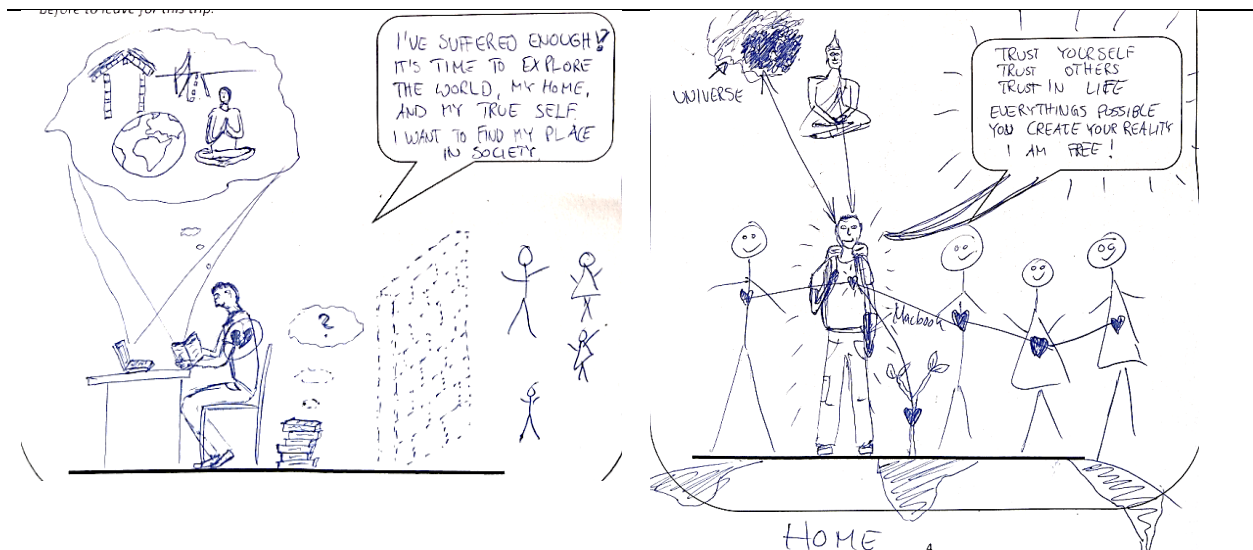
In support of this aspiration to connect with destinations residents, Brianna explains how her

encounter with a concentration camp survivor at Auschwitz-Birkenau is central to her

transformation and generates a feeling of group solidarity. Her testimony also provides

interesting insights about addressing difficult topics with transformative travelers. Since

transformative travel pushes travelers out of their comfort zone, transformative practitioners have

to find sensible narratives to prepare travelers to these extremely powerful emotions. Expanding

on the work of Magee and Gilmore (2015) on transformative travels at dark heritage sites,

Brianna reveals that having difficult subjects being introduced by a survivor is crucial for her

transformative experience. In her interpretation of her drawings, Brianna uses the powerful

symbols of a puddle of tears and a handkerchief (Figure 6):

> *In the before picture, on the floor is my suitcase. This would be totally before I went. In*
>
> *my hand is a camera and I'm just wearing a hat. In the after picture, I had my hat on*
>
> *because it was cold. Then tears, because I was so moved and saddened by what I had*
>
> *seen. And in my hand, this is supposed to be a handkerchief or Kleenex. And then on the*
>
> *floor is like a puddle of tears. More and more now we're hearing about people who*
>
> *believe the Holocaust didn't happen but if you go there, you know it happened. Some of*

the places that people go, or that tour companies bring you, aren't always the most

pleasant but this has happened. This is a reality and it is part of our history. It is

something that people should experience. I'm glad we had the opportunity to be there. We

were very fortunate to hear one of the survivors speak to us. This was the most moving

experience that I've ever had. I feel extremely lucky that we had had an hour with him

just telling his story and what he went through there.

Brianna, 65, transformative trip to Poland

Figure 6. Brianna's drawings

Brianna's before drawing	Brianna's after drawing
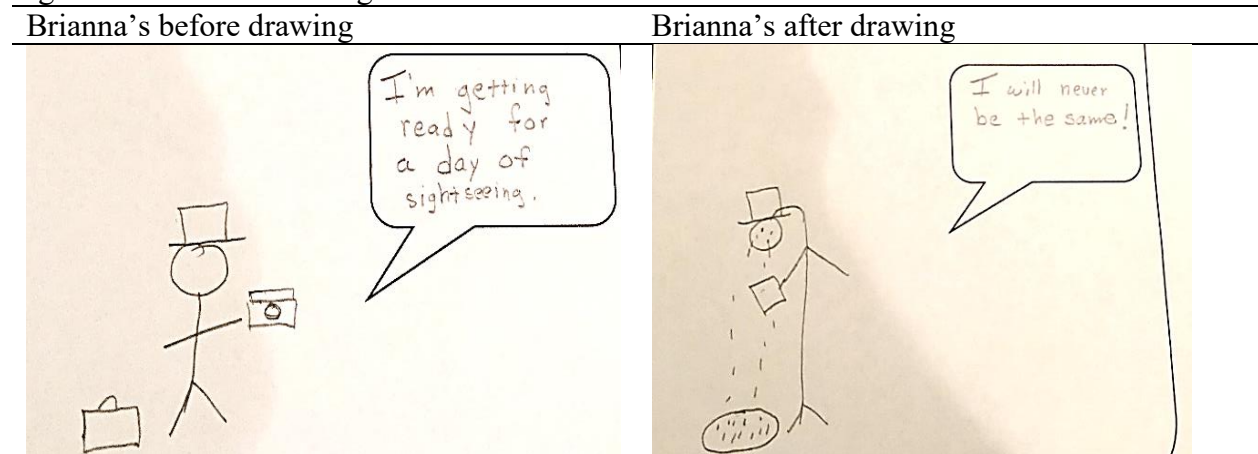
Francine's interpretation parallels one of Brianna and highlights the importance of meaningful

connections with destination residents. Francine and Brianna's testimonies enhance the work of

Basic (2017) and Owczarski (2017) about the presence of emotionally powerful symbols in the

narrative of contraction camps survivors. In her drawing interpretation, Francine shares how the

narratives of residents who have lived through the Bosnian War deeply impacted her worldviews

by using symbols such as a globe and a hug (Figure 7):

In my before drawing, I am carrying a notebook in my hand. I did some journaling and

took notes whenever we met with people or there's some piece I wanted to remember. I

draw suitcases because I was going to be traveling. I had always heard of Sarajevo in the

news but I never really understood what the conflict was about. One of the most powerful

moments was learning about how the Jewish community in Sarajevo help the non-Jewish

community when the wars were happening in the early 1990s. They created a soup

kitchen and they helped smuggle out a few thousand Muslims so they could be saved. And

they helped get in medical supplies for those who needed it. Another powerful moment

was going to Srebrenica and meeting few of the mothers and wives whose husbands and

sons were murdered. So meeting with them, hearing from them, seeing the graves, that

was very, very powerful. I really connected with one of the mothers. In Albania, I also

met with a man whose family helped save a Jewish family during the Holocaust. He must

have been a young boy and his parents helped save a Jewish family. In the after drawing,

I have the globe in my hand. I debated whether to put the globe in my hand or put it down

by my feet. But I did have the globe because it was a part of the world where I had not

been before. I've traveled to many places before but not there. Then I have a picture by

my feet of me hugging one of the mothers of Srebrenica. She and I were hugging each

other, putting our arms around each other. And that's when we met up at the cemetery

and where the United Nations was holding the men.

Francine, 55, transformative trip to Albania and Bosnia

Figure 7. Francine's drawings

Francine's before drawing	Francine's after drawing
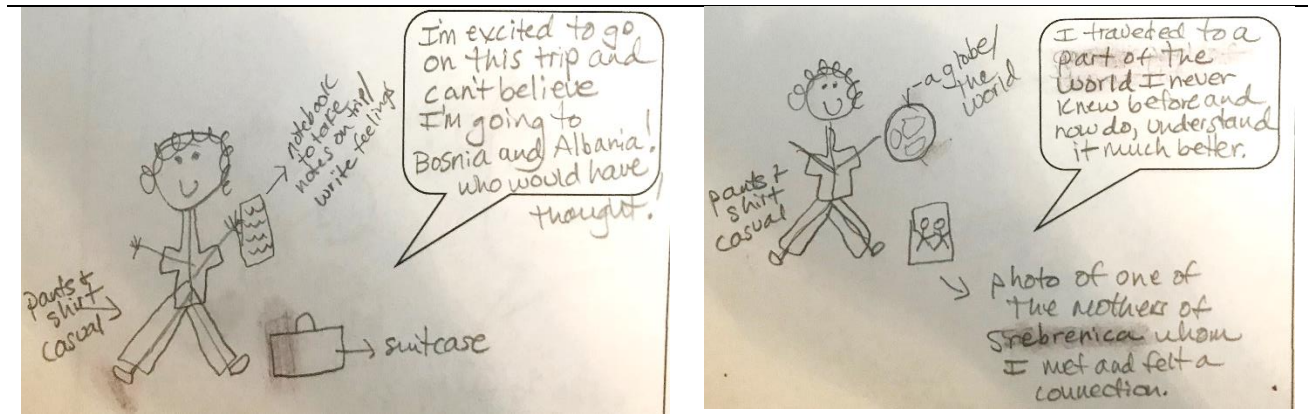
This focus on group solidarity with destination residents is echoed by informants in their sentence completion task. A notable finding is that informants use symbols that demonstrate a strong connection and clear respect for destination residents' culture as it is visible in the following series of sentence completions. For example, Heather is deeply moved by her encounter with Mexican immigrants during a cross-border immersion program at the border between Mexico and the United States:

> *If this trip was a magical power it would be super strength. I think that the people that we*
> *met very much encompass this super strength. They have gone through these really*
> *challenging experiences and still feel successful, feel proud, and hold on to their culture*
> *even though the United States is trying to force them to get rid of or ignore their culture.*
> *There is like this super strength that I saw in the communities that we met.*
> *Heather, 24, transformative trip to the USA/Mexico border*

Taking on a similar approach, Iris uses the symbols of the phoenix to shows the strengths of Cuban residents and selects the word empathy to show the emotional connection she feels with Cubans:

If this trip was a magical creature, it would be a Phoenix because it rose again from the fire. And I have hopes that you know, Cuba will continue to make progress and relationships with the United States will improve once again.

If this trip was an emotion, it would be empathy. I think that was brought out largely by our guide, Roberto. Here are people living in a very different country, living very different lives than I live, but they're just like me.

Iris, 73, transformative trip to Cuba

The importance of group solidarity with destination residents to the travelers' transformative experience is also visible when they are asked about a spiritual entity during the sentence completion task. For example, Ileana uses the symbols of the stars and Nicole selects a Zebra as a totem animal to illustrate her powerful connection with Africa and its residents:

If this trip was a spiritual entity, it would be the stars. I think of the stars as being like a way that we're all kind of connected. I think we did a lot of connection and seeing, differences and similarities between people on the trip. And so that's what came to mind. Ileana, 25, Transformative trip to the USA/Mexico broader.

If this trip was a spiritual entity, it would be a zebra. In Africa, they have a belief that all of their animals have different meanings. They believe that zebra stands for friendship, unity, and freedom. And that's what the stripes represent. This trip to Kenya showed me that you can have friends all over the world and that we can be united. Even though we have our individual things, and we're from different countries, we can still be together. Charles [Nicole's tour guide] and I went to a plateau that was overlooking the Rift Valley, and we stood there. And I'm seeing this river at the bottom of the plateau. I'm seeing the sunset, I'm seeing elephants coming to get water and giraffes walking in. I'm

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hearing lions and all of these animals. It was really emotional. I kind of got a little misty-

eyed because it was just so incredibly meaningful. And Charles came over to me and he

said, "You know what? There's always one on the trip that I always feel is the one" And

he added, "Because in Africa, there's a saying that everyone starts is in Africa and that

your soul is here". And he said, "some people actually come back and open their hearts

and find their soul". That is very, very true for me with the African continent. I do believe

my soul is there. And I go back a lot to experience it. This trip was life-changing for me.

Africa gave me freedom, calmness, and an openness that I've never really experienced

before.

Nicole, 60, Transformative trip to Kenya

The last subtheme of powerful human connection concerns group solidarity between fellow

travelers. Importance of connections with fellow travelers is suggested to be an expectation of

transformative travelers (Knollenberg et al., 2014) which is valuable for practitioners when

thinking of marketing and branding strategies. This finding reinforces the work of Sterchele

(2020) who suggests the Interactions Ritual Chain theory needs to be adjusted to reflect that

group solidarity has a ripple effect across time and locations. The presence of a ripple effect from

the group solidarity is present in the testimony of Daphne. Daphne is an oncology nurse who

connected with fellow traveling families while staying in a wooden cabin in Chile. During her

drawing interpretations, Daphne explains that her transformative experience is now helping her

to connect with terminally ill patients by using the symbols of the clock, cat, and people holding

hands (Figure 8):

I pride myself on the relationships that I have created with patients. The part of me that

needed to go on vacation was the one who had the watch on, was thinking about the

potential negative side effects of chemotherapy, and was being responsible for this other

human being. So I was looking forward to escaping the heat of the work environment and dealing with death and dying or scary diagnosis. Being in that wooden cabin in Chile was a powerful moment. We were cross-culturally connected with one another and agelessly too as well. There were teenagers sitting next to their parents sitting next to somebody else's parents. It blended cultures, it wasn't about what country you were in and it became a place in a setting all by itself. And everybody took a turn, nobody had the floor. It was about an exchange of minds. It was a powerful connection. It was a soulful thing. In my after drawing, I am holding hands with, it could be family members, it could be patients, it could be coworkers, but I feel a contentment inside. I feel like I was reminded of what's important. Oncology patients tend to really be relationship-driven, especially with their chemotherapy nurses. So I found it an easy trip to explain to them because they start over at the point in their lives, where Saturday isn't about how much you accomplished but it is about who you are with. So it made me mindful of what's important. It is just to being a cat, I envy my cats. As long as my cats' minimal needs are met, they are happy. If we dumb it down and make life kind of more simple then most of our needs are met. Just let it be. It's just about connecting with humans.

Daphne, 40, transformative trip to Chile

Figure 8. Daphne's drawings

Daphne's before drawing	Daphne's after drawing

Hence, the first theme of aspiration for powerful human connections is rich in symbols and multiform as travelers seek meaningful connections with their own origins, family, destination residents, and fellow travelers.

Gain and Defend New perspectives

To gain and defend new perspectives is another over-arching theme that emerges from the symbols and narratives of transformative travelers. This theme contributes to the work of Goss and Sadler-Smith (2018) on the Interaction Ritual Chains theory and its concept of standard of morality. According to the concept of standard of morality, individuals learn set of values through their interaction with other groups' members and defend those values when they come under attack by outsiders (Collins, 2004). This desire to gain and defend new perspectives also meshes with the transformative tourism theory (Noy, 2004). For example, Noy (2004) mentions that backpackers are protective of the values they learned during their transformative trip. Discussions with informants reveal that they are eager to better understand larger social structural issues and defend values learned during their travel across a variety of transformative experiences. Informants reveal that their desire to gain and defend new perspectives take on multiple on shapes and three subthemes emerged from their narratives and symbols: 1) the desire to develop a thorough perspective on the destination, 2) the necessity to become more cognizant with threats to groups solidarity, and 3) the yearning for stronger self-confidence.

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The desire to desire to develop a thorough perspective on the destination emerges through the narratives and symbols shared by participants such as Rose, Gwen, Colton, Ileana, Eric, and Nicole. Building on the work of Soulard et al. (2019), informants share that their transformative trip is an eye-opener that leads them to understand different perspectives and makes them realize the complexity of the situation on the ground. Based on the Interaction Ritual Chains theory, developing a deeper understanding is also crucial for individuals to defend the standard of morality of their group (Curry & Gordon, 2017). Discussions with participants reveal theoretical alignment between the two theories. For example, Rose explains that her transformative trip to Uganda helps her to understand the importance of having practical field experience to truly grasp the complexity of a socio-political issue. Rose is a Master student who studies health and development and has participated in a volunteer tourism program in Uganda. Rose explains that the complexity of the HIV epidemic in Uganda makes her reflect on her role as a health provider and the importance of having practical experience. In her drawings, Rose displays a stack of books in different manners to symbolize the needs to change perspectives and to understand a complex social situation through practical applications (Figure 9):

> In the before picture, I have a purse in my hand. It's not like I didn't have always donated
> to causes before but I'm a bit more careful and informed now. I know what to look for to
> see whether the organization is a good one. I've seen it from the ground, I got to know
> different levels of grassroots organizations and international organizations. In the before
> picture, the books are all in a big pile. It's good to have some information, but actually,
> you need to go out there and also add experience to your education. So for example, as
> part of the HIV AIDS organization, they asked me to take part in the Advocacy March. So
> I was basically a white Western woman, parading around a big sign about safe sex on my
> back, in the middle of everyone else being Ugandan. I felt like I stood out like a sore

thumb. That was quite an experience from a social perspective. I have to say, I'm glad I

did it. I was slightly terrified to begin with, and then I became less aware of that as time

went on. I found is that I can handle quite tough situations like been being around people

that are telling me things that are obviously quite challenging. Working in an HIV AIDS

Center was challenging where you do AIDS week watch and people are really sick. Some

people are dying with AIDS and their children are HIV positive. I'm a quite emotional

person, it's really surprising to be and work in somewhere like that. Basically, I wasn't to

be crying over the situation. I applied my business experience and my training experience

to help things improve. So if you look at the first drawing, the pile of books is much closer

to my body. In the after drawing, the pile is still there but it's not as nicely organized. So

this experience has tested my instincts. I think constantly testing but then maybe it's good

to do so. The reality for everybody in the world isn't the same. So I think, actually, it has

toughened me up a bit as well, which is a good thing.

Rose, 50, transformative trip to Uganda

Figure 9. Rose's drawings

Rose's before drawing	Rose's after drawing
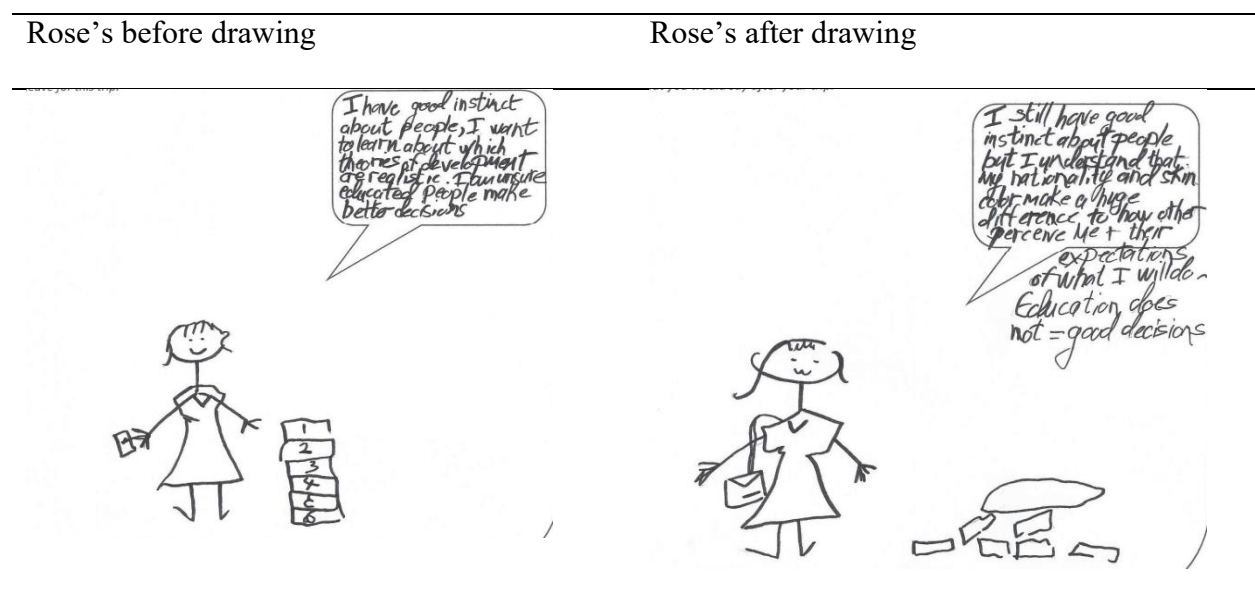
The transformative travelers' answers to the sentence completions task provide additional compelling pieces of evidence of their desire to develop a thorough perspective of the destination. In particular, transformative travelers use animals to symbolize how their travel experience exposes them to multiple and exhaustive perspectives of the destination's culture and the socio-political situation in the ground:

> If this trip was an animal, it would be a giraffe. They are tall and they're grounded. They're still on the ground, but they're tall enough to look over everything and get a different perspective. And I think this trip did that. To me, it was grounded. And it was real. But it also let me see things from a totally different perspective.
>
> Nicole, 60, transformative trip to Kenya

> If this trip was an animal, it would be an eagle because you can fly up and you get a bird's eye perspective, or a different perspective on life, which is what I feel I got.
>
> Colton, 33, transformative trip to South Africa

> If this trip was an animal, it would be a horse. I think because it was so powerful and showed me so many different aspects of Palestine. We covered many years of Palestine's history and saw so many different places. So it's like galloping from one place to the other and they're all-powerful.
>
> Emily, 70, transformative trip to Israel/Palestine

> If this trip was an animal, it would be a bird. The trip was kind of like flying over the whole situation in the country, and just offering kind of a bird's eye perspective on a lot of issues and also going down to details. So a bird was the most fitting for me.
>
> Gwen, 27, transformative trip to Israel/Palestine

The transformative travelers' desire to develop a thorough perspective of the destination
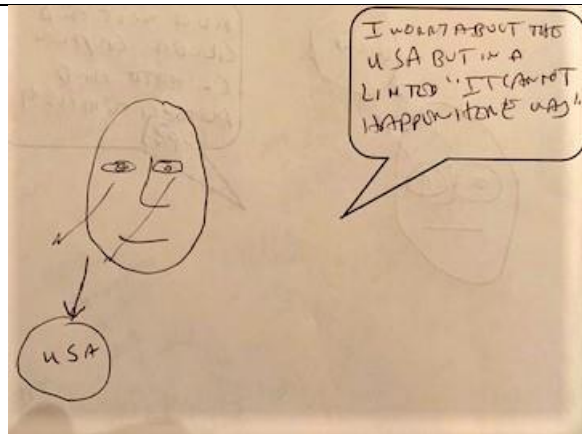
branches out into the second subtheme of the necessity to become more cognizant with threats to group solidarity. This finding elaborates on the works of Richards (2015) and Goss and Sadler-Smith (2018) as transformative travelers become aware that emotional energy can be used in a manner that is either positive or destructive to society. Thus, transformative travelers desire to defend their values against individuals who attacked them and threaten their standards of morality. In his drawings, Greg exemplifies his new understanding that emotional energy can be dangerous to group solidarity when it takes the form of propaganda, authoritarianism, and fascism. This new awareness is brought by a trip to Hungary where he visited a museum that explains the rise of the Nazis' regime and Hitler and his followers use propaganda to spread their lethal ideology. Greg draws eyes being open and closed to symbolize the necessity to become more cognizant with threats to groups solidarity (Figure 10)

> *What I'm trying to say with my before drawing, is that my view was very limited and narrow and now it is much more wide open. What I'm trying to portray is that even though I traveled a lot, nothing was quite impactful as going on this trip. So basically, I was very focused on what was happening in the U.S. without thinking things like authoritarianism and fascism could happen here too. I thought that some of the problems I saw in other countries may not ever happen here in the U.S. Certainly, my eyes are now open. And complementary to that, I'm much more of a global person on authoritarianism. So the whole Hitler thing made me think back to the characters we see running the country today. So I'm looking up at the world rather than just down to the U.S. seeing the good and the bad, and the issues we all share.*
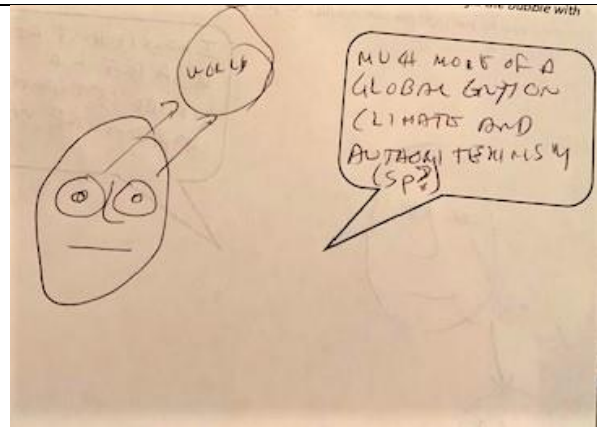>
> *Greg, 67, transformative trip to Hungary*

Figure 10. Greg's drawings

Greg's before drawing	Greg's after drawing

Transformative travelers elaborate on the necessity to become more cognizant of threats to groups solidarity during the sentence completion task. Transformative travelers such as Gwen, Ileana, and Iris exemplifies this the necessity to become more cognizant with threats to group solidarity through the symbols of the flashlight, camel and Hindu god Shiva:

> *If this trip was a picture, it would be a flashlight because it's like shining light into some*
>
> *of the corners that usually remain dark. People close the door of their cleaning cabinet.*
>
> *With this trip, it was as if people came over, opened the cleaning cabinet and looked with*
>
> *a flashlight into its dark corner.*
>
> *Gwen, 27, transformative trip to Israel and Palestine*

> *If this trip was an animal, it would be a camel. I was thinking about when we were in the*
>
> *desert. Camels can survive without a lot of water. And so when we were learning about*
>
> *migrants that are trying to cross over that was an animal that I thought about. I think a*
>
> *lot about how I'm interacting with other people and how everyone's background affects*
>
> *their day to day life. And I think a lot about the privileges that I've been given and how*

they've gotten me to where I am. I thought about how people ended up on this trip and about their background.

Ileana, 25, transformative trip to the USA/Mexico border

If this trip was a spiritual entity, it would be the Hindu god Shiva. It just seems to me like there are two sides to almost everything that we saw. We would see a beautiful building and our guide would point out that it was riveted with bullet holes during the revolution. Or we would hear wonderful performers, young high school age students in their art school, and we would be sitting on these shabby seats with rips and stuffing coming out.

Iris, 73, transformative trip to Cuba

The transformative travelers' necessity to become more cognizant with threats to groups solidarity and the knowledge generated by this awareness develops into a third subtheme of yearning for stronger self-confidence. Self-confidence is noted by Collins (2004) as being a result of successful rituals and social interactions among group members. Learning about the challenges faced by destination residents and their strength in the face of adversity gives transformative travelers the desire to themselves grow and become more confident in their ability. This yearning for stronger self-confidence yields new evidence to the work Sterchele (2020) and suggests that transformative travelers are drawn to experiences that are marketed as fostering positive emotional energy. This positive emotional energy is congruent with the transformative travelers' desire to learn from their transformative travel experiences and improve themselves. For example, the yearning for stronger self-confidence is at the center of Heather's interpretation of her drawings. Heather draws herself surrounded by people she met during her trip giving her the strength to tackle the next phase of her life (Figure11):

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In my before drawing, I have somebody next to me that signifies my dad. There was a lot of confusion from my family about my trip. Like they didn't really understand why I was going on this trip and why I felt the need to go on this trip. In my after picture, I have a lot of people around me, which is the people that I went on the trip with. All of those people also impacted me. I created friendships and relationships with these people. I felt that I was still in a place of needing a lot of self-development and that I wasn't getting it from where I was currently. I knew from there that I was going on to grad school and I was not going to stay within New England. It would have been a disadvantage for me to stay close to my home. Thanks to that trip, I had more self-assurance that I was like "yes, this is the right thing for me to do. And I need to do this for myself to be happy and to move forward and develop as a person."

Heather, 24, transformative trip to the USA-Mexico border

Figure 11. Heather's drawings

Heather's before drawing	Heather's after drawing
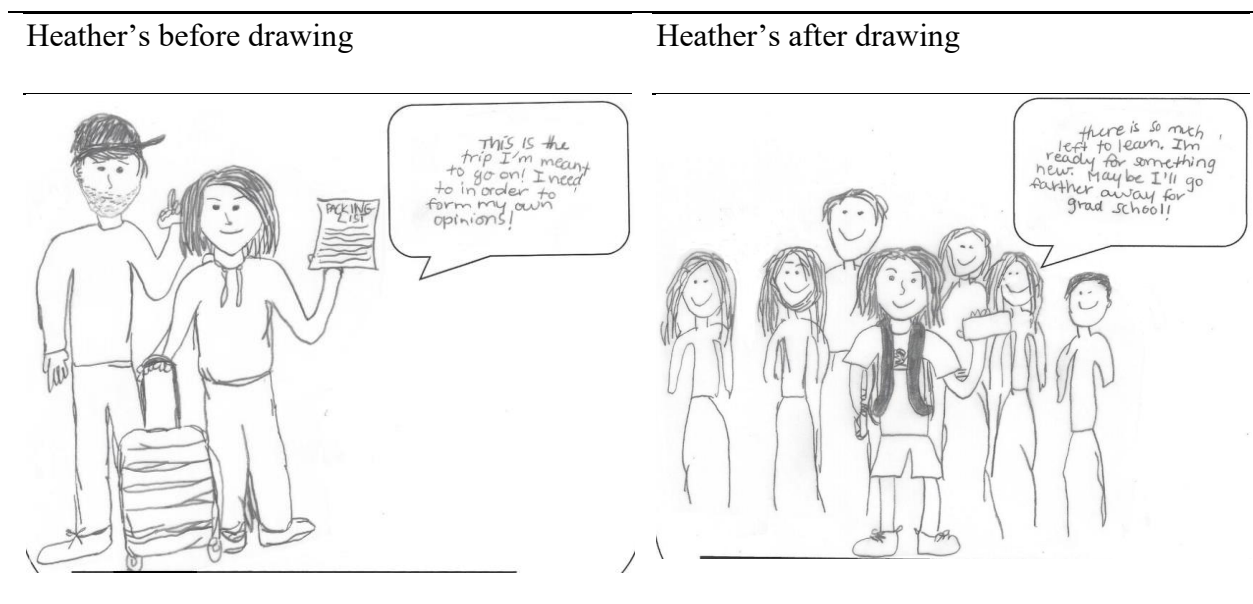
Heather's yearning for stronger self-confidence is echoed by Colton and Emily as they use Frozen and Wonder Woman as symbols of their newfound confidence:

If this trip was a fairytale or a folk story, it would be Frozen because you are sort of facing your fears and coming through. Because you know, your friends are there and they help you through it and you come out better.

Colton, 33, transformative trip to South Africa

If this was a magical creature, it would be Wonder Woman. I can say it is extremely difficult to explain to people how hard it is to transform. I still have fears but I just want people to know that they can change.

Emily, 70, transformative trip to Israel and Palestine

Expanding on the work of DeCrop et al. (2018), transformative travelers follow closely Collins's (2004) description as they condemn others who violate their standards for morality by preferring more commercialized forms of travels:

I really did enjoy this kind of trip and I would love to do something like this more. I think it's very important also to spread this. And I love that they're also doing it in different regions because there are so many places in the world that do have more than one perspective. I know they already have trips to the Balkans, for example. I was there a few years ago and you can still see how torn it is. And I would love to know like all the different perspectives. I got a glimpse of it just being there but it's still different to hear from the locals in a deeper manner… I definitely prefer all of this to the resort part where you're just in a bubble and just in a pretty place, but don't hear anything else around it.

Gwen, 27, transformative trip to Israel and Palestine

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You get so much out of it for yourself like the confidence and the insights into different countries. So it's just a matter of allowing yourself to do it. Because if you have the intuition or the feeling to do it, it's what you should do. My recommendation is just to make things happen. Go ahead and you will see for yourself.

Andrew, 25, transformative trip to Nepal

I talked very positively about China a lot after I got back from the trip. And I told people, "you really need to go there and it's nothing to be afraid of".

Bradley, 79, transformative trip to China

After I came back home, I talked to people about it. For Cuba, I would not want to visit there on a cruise ship, the way to go there is to travel around the country and experience a little bit more than most people on cruise ships do. We walked by the area where they got off and it's a lot more hassle.

Dereck, 63, transformative trip to Cuba

It is easy to get frustrated with people who have opinions about places you've been and they have not been. Because they don't understand, they don't have the perspective that you have. I try to be patient with people if they make a comment about the Middle East or a comment about South America or Africa because they haven't had the experiences I've had.

Eric, 70, transformative trip to Peru

I become a role model in some ways for my nieces and nephews. I personally don't have children but I'm showing them that you take the path that life gives you, how to make it the best, and traveling has done that for me. I'm showing people by doing.

Nicole, 60, transformative trip to Kenya

If you stay somewhere for a longer period of time, you really get to know the place. When you travel from A to B to C, D, you just do like the bucket list thing. I don't think you get to know a country by being somewhere during the summer for a couple of days. I really don't. I think if you really want to appreciate a culture and a country, you need to spend a longer period of time and don't be in such a hurry to see everything.

Rose, 50, transformative trip to Uganda

And that's what I tell everybody, "just don't go just for the scenery, get into the culture, get into talking with the women and men and let them affect you. And then that will change your own perspective."

Betty, 77, transformative trip to Tanzania and Kenya

Informants reveal through their narratives and symbols that their desire to gain and defend new perspectives offers potential in terms of content marketing (Mick, 2006). Transformative tourism can be marketed to travelers as an opportunity to develop a more thorough perspective on the destination, become more cognizant with potential threats to groups solidarity, and develop stronger self-confidence.

Willingness to be a Transformative Energy Star

A third theme of willingness to be a Transformative Energy Star emerges through the transformative travelers' symbols and narratives. This theme enhances the works of Matthews

(2017) and Cowan and Spielmann (2017) by exemplifying how transformative tourism can be marketed as a ritual that fosters enriching and meaningful lifestyle. The theme of willingness to be a Transformative Energy Star also supports the suggestion of Kirillova, Lehto, and Cai (2017a) that transformative tourism should be marketed as an ongoing and lifelong endeavor. The theme of willingness to be a Transformative Energy Star feeds upon three subthemes: 1) implement lifestyle change, 2) take concrete social actions to implement new values system and 3) engage in proselytism at home for transformative tourism.

Discussions with informants such as Nicole and Oriana reflects the powerful lifestyle changes that transformative travelers directly implement as a result of their trips. For example, Nicole explains through her drawings her decision to refocus her life around travel and lead a less materialistic life. She draws a larger head to symbolize her intellectual enrichment and an antenna in her hand to symbolize her dedication to animal conservation that now fully occupies her life (Figure 12):

In the before drawing, my life was pretty routine. I was doing what everybody did. It was what I thought was living a good life. I had a very nice home, my cell phone, my laptop, and I took those things to work. I followed the same path every day to work, then I turn around and come back to my home. It was a lot of back and forth and kind of doing the same thing. That is why I am saying in the bubble "I'm so tired but back to work". Then at some point, I just kind of said, "You know what, I need a life, I need to get off of this path a little bit." I was searching for things. And it was about that same time that my father got quite ill. I had a bucket list of all the things that I wasn't going to wait to do in my life anymore. And travel became one of them. So I just decided, I am not going to wait, I'm just going to save money, and do some extra jobs. I pulled the money together to go to Kenya. And the rest is history as they say.

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In the after drawing, you can see how my life has changed. My life is very full. My heart is large - I have a large heart now because I feel like I have more empathy for the different cultures and people around the world. My head is larger because I've learned so much. I always had a real passion for the animals. So now after this trip, I've become involved with numerous conservation activities and research projects. I'm working with wildlife researchers in Africa to study animals. I'm helping to track animals and monitor them. I'm helping to determine ways that you can work with communities to help them understand why snaring and hunting are detrimental not only to the animals but to the long- term success of the community. So the elephants and the paw prints are here to represent that. I'm holding an antenna in my hand, which is how we track the animals. I had a plan where I decided to take a trip every year somewhere. I wanted to go to all the continents. I wanted to see the world. And so I made a plan to do that. I sold my house and got a smaller place. I started saving a lot of money and putting it away to be able to retire from the school district that I worked for. I retired early and changed my life. I have consulting work now that pays for trips. So this trip to Kenya has impacted me pretty significantly.

Nicole, 60, transformative trip to Kenya

Figure 12. Nicole's drawing

| Nicole's before drawing	Nicole's after drawing
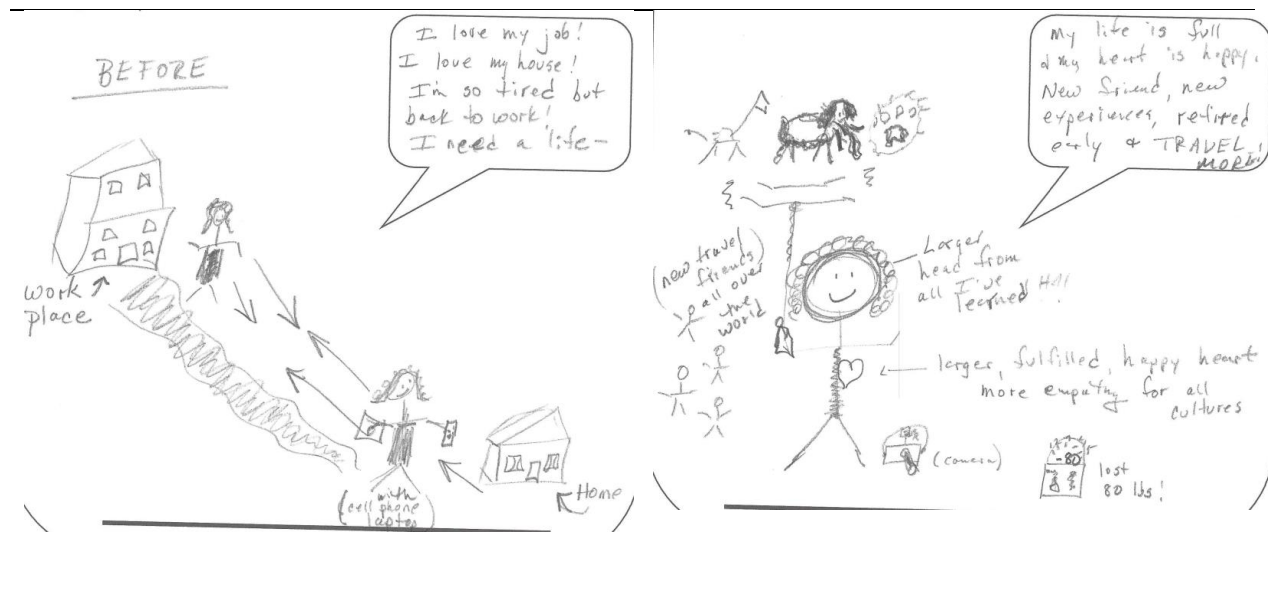
Similarly, Oriana shares how her discovery of the work of Nelson Mandela inspires her to travel to South Africa and switch her career path to follow her passion. Oriana draws a passport and guitar to symbolize her new lifestyle that focuses on music and travel (Figure 13):

It was kind of a surprise to me how the drawings were going to turn out. Right before my trip, I worked at a YMCA, that's why I have my YMCA shirt and I'm holding a rowing halter. I was a fitness trainer and taught classes. The trip was kind of something I thought I would do one time and probably never again. And I just thought I would go back to my life. But I ended up actually realizing that I kind of found my identity. And that job, it wasn't really my whole identity, so I totally ended up leaving that job after that trip. I have been reading Long Walk to Freedom by Nelson Mandela before the trip and I was really inspired by it and really continue to be. After the trip, I started playing the guitar, making time for things like music in my life. And I actually now teach guitar lessons part-time. This trip kind of gave me the confidence to try something new like that. I always say I can't wait to go back. On the floor by me, is my passport. Always ready to go again.

Oriana, 37, transformative trip to South Africa

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Figure 13. Oriana's drawings

Oriana's before drawing	Oriana's after drawing
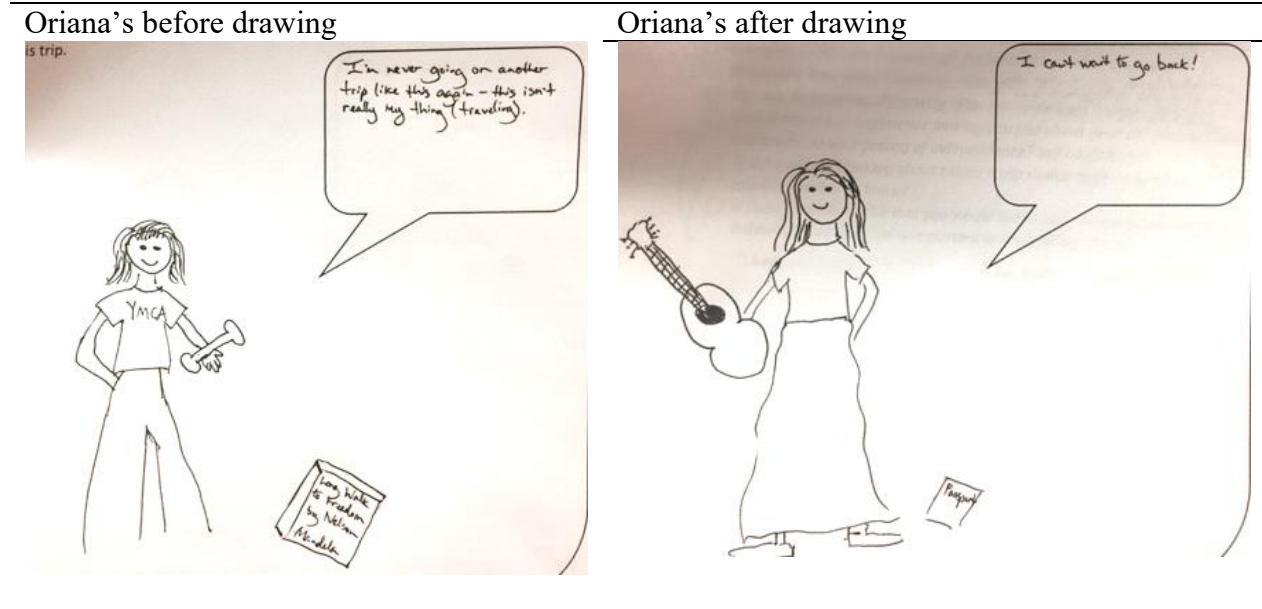
The transformative travelers' lifestyle change is reinforced in their answers to the sentence completion task. For example, Nicole and Kayla use the symbol of the Sleeping beauty and Snow White to express how their transformative trip has awoken them to new life. Strengthening this finding, Rose selects the adjective life-changing to qualify her experience and Amelia associates her change in lifestyle with healing:

If this trip was a fairytale or a folk story, it would be the sleeping beauty. Not that I am

the beauty but you know, she kind of went to sleep and all these magical powers help to

wake her up and take care of her. And I kind of felt like, maybe I was asleep in my life

and all these different things in Africa help to sort of wake me up a little bit.

Nicole, 60, transformative trip to Kenya

If this trip was a fairytale or a folk story, it would be Snow White. You know, she ate the

apple but then she came back. She woke up when the prince got there. That's kind of what

it was. It was really an awakening, the whole thing.

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Kayla, 66, transformative trip to Tanzania

If this trip was an adjective or a noun, it would be life-changing. I now live in Southern Africa. It's inspired me.

Rose, 50, transformative trip to Uganda

If this trip was an adjective or a noun, it would be healing because I felt very wholesome during this trip. I felt like I had finally stepped away from my busy life and controlled this life a little bit.

Amelia, 18, transformative trip to the US Virgin Island

An equally important subtheme that emerges from transformative travelers' symbols and narrative is taking concrete social actions to implement their new values system. Transformative tourism practitioners can use examples of concrete actions in their marketing content to provide aspiration for potential transformative travelers. Sharing aspirational examples can prompt potential transformative travelers to also want to be Transformative Energy Stars in their own community and have a positive impact on the life of others. For example, Emily shares how her transformative travel to Palestine and Israel leads her to become an activist for peace. She employs powerful symbols like an open-heart, a cactus, and a protest sign (Figure 14):

> *In the before picture, I draw a big heart and I colored it black inside and it says "closed heart". Meaning that before the trip I was mostly terrified. In my hand, I have a sign that says "Arabs hate me." On the floor, I have a cactus. The cactus is on the floor because it is specific from the area and it grows on both sides of the border. Once I crossed the border, the cactus was so poignant for me because the land was the same. It had the same spirit that the land I grew up on. In the after picture, the heart is open. I am holding a peace sign. The cactus is on the floor. And then the caption said: "Israelis have no clue*

about the Palestinians". [The trip] changed me, I believe peace is possible. I became an

activist and I joined a national group called the Sisterhood of Shalom. It is an anti-hate

group in the US. I spoke several times over the next years in synagogues, mosques, and

churches. It was good to speak to people about my experience. I also went on a civil

rights trip two years later here in the US.

*Emily, 70, transformative trip to Israel and Palestine*

Figure 14. Emily's drawings

Emily's before drawing	Emily's after drawing
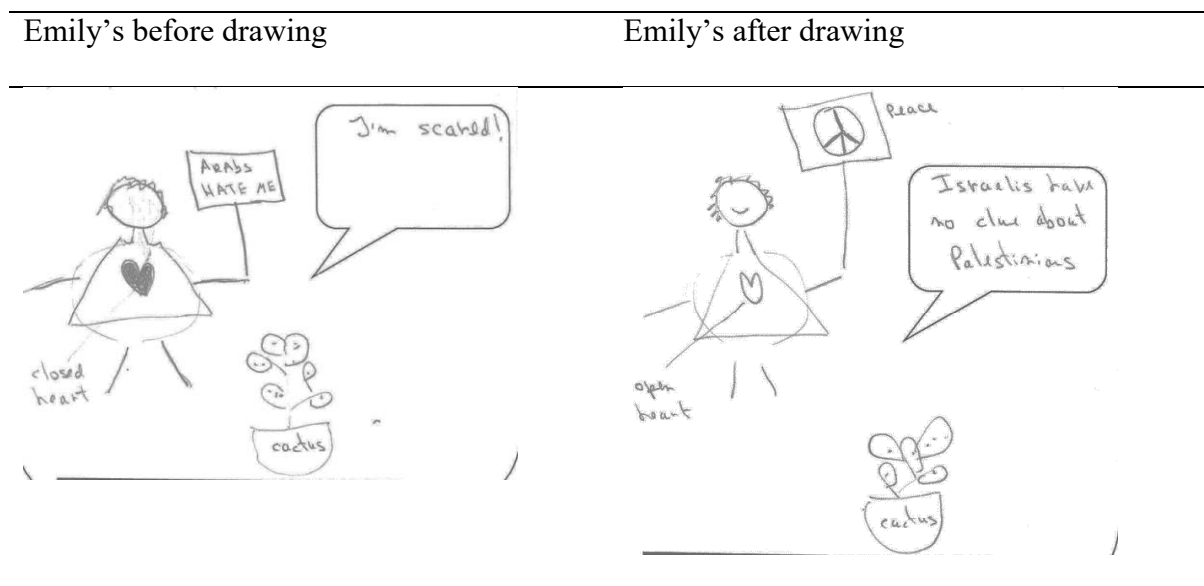
Emily's empowering story and is echoed by the one of Felicia. During her transformative

trip to Poland, Felicia realizes that people have died because they wanted to practice freely their

religion. She decides to honor them in her everyday life by actively supporting freedom of

speech and religious freedom. Felicia's desire to take action is also visible in the symbols of the

prayer book, mourning clothes, and flowers. Her interpretation of her drawings also emphasizes

her desire to be humble, recognize the hardship of others, and respect people who have lost their

lives fighting for freedom (Figure 15).

In my before drawing, I thought "oh, I'm a world traveler. I'm going to go, see something new and different that I can talk about. I'm an American and I want to show that Americans are open to other cultures." I feel like I was naive. In my hand, I am holding a credit card which I feel illustrates the craft of American travelers. In the bubble, I wrote that I worked really hard. And I don't believe that any longer. I mean, I worked okay but my hardships were nothing compared to what I saw people endure. I have everything, I have a nice house, I have a nice car, and I have a dog. After I came home, I really believed that I did not really earn the same level of respect for my work and for my education that I thought I deserved at first. When I looked at the people that I encountered in Poland, they don't get opportunities. Whereas I had more opportunities, I just had to choose where I wanted to go and what I wanted to do. But after I came back from my trip, I realized it was all handed to me, in the sense that I never really had to sacrifice. The opportunities for me were just so right there in my face. And other people would love to go to college, finish high school, or have a good job. Too many of the people I met in Poland actually travel to many other places to work to make enough money to support their families. They were all working a second job in the summer. They do these things to make ends meet. In my hand, I had flowers. I wanted to put flowers in my hand because to me they symbolized peace. I was trying to offer peace to these people who have been so harmed. In my other hand, it's a prayer book. I draw a prayer book because I promised myself that I would honor those people by practicing my religion faithfully. I know people died trying to go to churches. And so that's just something that is very significant to me. I also choose to wear mourning clothes to show that I was sad in many ways about what I had learned. After this trip, I gave a talk at my church about the idea that we are free to practice religion and many other things like belong to clubs and

pursue our passions. And that truly people died trying to defend their homeland because they wanted that same freedom. I talked to myself and I said I will never again take my ability to be free, to practice politics, religion, or anything for granted. As if I had done something to achieve that because I did not. And the only way I thought I could honor those people who died fighting for those freedoms was to be more cognizant and more active in practicing my beliefs, either religious or political. I belong to a couple of different book clubs that read books that are controversial. I am able to say out loud, how I believe the book is instead of being forced by some regime.

Felicia, 60, transformative trip to Poland.

Figure 15. Felicia's drawings

Felicia' s before drawing	Felicia's after drawing
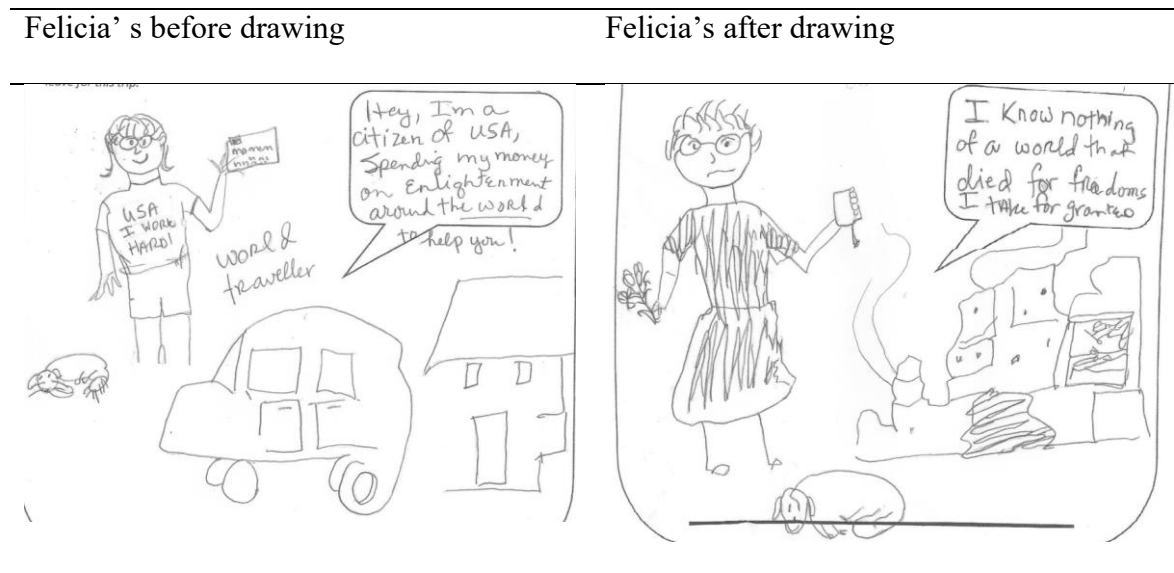
In the same fashion, transformative travelers expressed their desire to take concrete social actions to implement their new values system during the sentence completion task. For example, Francine and Tiffany share story tales that symbolize the importance of helping others, sharing, and fostering solidarity:

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If this trip was a fairytale or a folk story, it would be the story about the two brothers. There is a brother who's married and has kids. He has a brother who is single and does not have kids. The single brother has a lot of riches, and his crops are growing really well but he feels sorry for his brother who has a wife and kids to take care of and doesn't have enough money for food. And then the brother who has the wife and kids feels bad for his brother who's single and doesn't have a family. And so they each they go back and forth leaving food for the other until one day they made it at the exact same time and realize who's been leaving food for the other. So that's the story this trip reminds me of. Francine, 55, transformative trip to Albania and Bosnia

If this trip was a fairytale or a folk story, it would be the story of the stone soup. I don't know if you're familiar with the story. We've always called it stone soup. It's a folk tale about a young man who is very, very poor. And he's walking around and he has this pan full of water. He has nothing else. And so he sits by this gate where people are coming in and out of a village. He has a stone in his pocket and he puts this stone in the water and he starts stirring the water. And somebody comes by and says, 'what is that?' and he says, 'Oh, that's my soup. It's really wonderful', 'Can I have some?' And he says, 'Well, you know, it's not quite ready yet. Oh, look, you have a carrot. You know, let me taste it. You know, if you put your carrot in, I think it would be really wonderful'. So the man puts his carrot. And he said, 'but it's still not ready yet.' And then another person comes by and has a potato. And he says the same thing, 'If you cut up your potato and put it in the soup, it would be even better.' And then it goes on, somebody puts in cabbage and somebody puts in something else. And then finally he tasted it. And he says, 'Oh, this is so good.' And then he can have something that he serves to everybody else. And I love that

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story. And I think about how you have nothing other than maybe your imagination, but

you ask people to start to share and then people start to share more, and then somebody

else shares something. And it all starts to have a different flavor. And look at what you

get at the end that you can share with other people.

Tiffany, 70, transformative trip to Ghana

The last subtheme of engaging in proselytism at home for transformative tourism

represents is the culmination of being a Transformative Energy Star. This subtheme builds on the

works of Sterchele and Saint-Blancat (2015), Sterchele (2020), and Calderón-Monge (2017) and

focuses on the transformative travelers' desire to actively encourage others to take part in

transformative tourism and their feeling of pride to belong to such a socially aware group of

travelers. For example, Sophia's after drawing reflects her eagerness to talk to people about her

transformative trip to the United Arab Emirates. She symbolizes this eagerness by drawing

herself as engaging in a meaningful discussion with someone (Figure 16):

On the before drawing, I was just trying to define how I was a little timid about going for

the first time in Dubai and other areas UAE. I did not know what to expect and I was

wondering how the people would be. Regardless of anything else I was going to go and

we hope we would learn something about the country. So I felt a little trepidation. I was

just a little timid and a little unsure before we went. Afterward, I came back and I felt

relieved, we had a wonderful time. We were looking forward to returning after the first

time we went. We wanted to go back again, we felt like there was still so much we hadn't

seen. We wanted to see more and learn more. We had that little episode where we were

stuck in the desert in the sand and three strangers just out of the goodness of their heart,

without us even dragging them down, just turned around on their own accord. They could

see we were in a bit of distress and they helped. It just kind of shows that the desire to

help a brother whether that brother is from their part of the world or another part of the world, it just transcends everything it. The willingness to lend a hand means a lot to us and it was good to see. It told us a lot about the country we were in and you hear things you don't know what to expect. We were very pleased, we saw the friendliness and the courteousness. We were invited in and we were given this gift of these dates and so we enjoyed those when we brought them back. And then in the after drawing, I'm talking to a neighbor or a friend. I spoke to a lot of people about it. I also started asking more questions where other people were from and I wanted to hear more about them.

Figure 16. Sophia's drawings

Sophia's before drawing	Sophia's after drawing
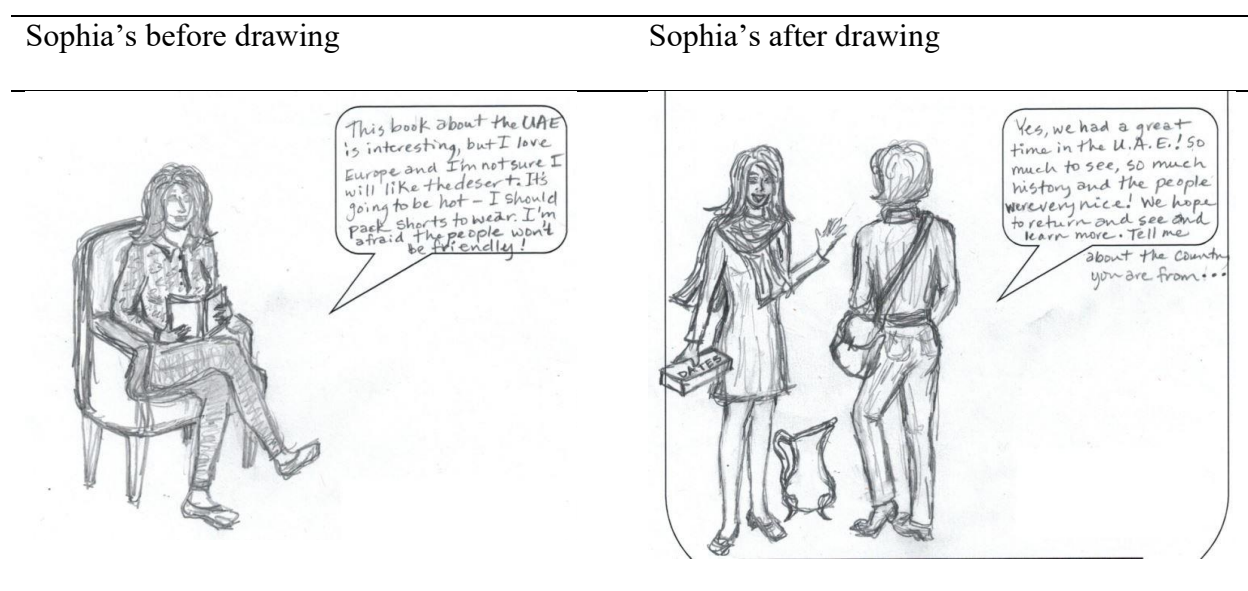
In support of this idea of proselytism at home, the sentence completion task reveals the transformative travelers' desire to encourage others by using symbols that strike by their positive emotional energy through their references to love, happiness, opportunity, and contentment:

If this was a color, it would be yellow. I said yellow, which I think even surprised me because I feel like when I'm thinking of describing something, I don't usually use the color yellow. But I used yellow because it is a happier color. And I think, all in all, this

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was a very happy trip. Like there were so many times on the trip that my heart felt really,

really full. And I just felt much loved, very energized, and pushed out of my comfort zone

in a way that made me have a huge smile on my face. So as much as it can be difficult, it

was a trip that was surrounded by a lot of happiness, laughs, good conversations, and

getting to know people a lot better.

Heather, 24, transformative trip to the USA/Mexico border

If this was a color, it would be blue sky. It is my favorite color, but it also suggests that

there are horizons to be explored and the importance of being open to new opportunities.

As long as we are healthy, my wife and I are going to travel.

Eric, 70, transformative trip to Peru

In conclusion, transformative travelers share rich symbols and narratives surrounding

their 1) aspiration for powerful human connections, 2) thirst for knowledge, and 3) willingness to

become a Transformative Energy Star. The theoretical, methodological, and practical

implications of these findings are discussed in the next section.

Discussion and Conclusion

Using a multi-method approach, the present study investigates to investigate 1) how are

transformative tourism practitioners viewing marketing symbols and narratives as well as 2) how

and in what ways transformative tourism narratives are symbolized by travelers. The study and

its findings have methodological, theoretical, and practical implications that are further discussed

below.

From a methodological perspective, the present study suggests that projective techniques,

when combined with in-depth interviews, offer a wealth of information for researchers interested

in investigating the symbols, narratives, and marketing content associated with the travelers' lived experience. One of the difficulties associated with projective techniques resides in the threat of researchers imposing their own interpretations of the drawings created by informants (Pich & Dean, 2015). The present study builds on the methodological work of Pich and Dean (2015) as travelers are able to cross-check their own interpretations when receiving a full transcript of their conversation with the researchers. This strategy also answers the call of Kirillova et al. (2017c) to focus on the meaning-making aspect of transformative tourism, give center place to the informants, and help ensure the validity of data analysis. The multi-method approach that combines projective techniques with in-depth interviews also expands the work McWha et al. (2018) who explore the essentialist in nature of transformative tourism. From an ontology perspective, they encourage researchers to recognize the value of analyzing transformative travelers' autobiographic writing. Writing, much like drawing, is a cathartic medium that allows travelers to reveal their true selves. In the present study, the interviewed travelers explicitly share that the simple act of drawing allows them to re-live their journey, focus on its key elements, and self-reflect on the changes that have occurred as a result of their transformative tourism experience.

In terms of theoretical contributions, the study answers the call by Lamers et al. (2017) for tourism research to focus more on practice theories. The present study suggests that the Interaction Ritual Chains theory offers a valuable theoretical lens to investigate social practices related to transformative tourism experience. Based on our findings, we propose an extended version of the theoretical framework (Figure 17) by Collins (2004) that clearly depicts how the transformative tourism experience fits within the Interaction Ritual Chains theory. As indicated in the findings, the presence of group solidarity is directly witnessed in the overarching theme of aspiring for powerful connections because transformative travelers mention the importance of

connecting with their own origin, family, unit, destination residents, and fellow travelers. Emotional energy can be found in the overarching theme of willingness to be Transformative Energy Stars where travelers implement lifestyle changes and engage in concrete actions. Symbols of social relationship is witnessed in the powerful symbols that travelers shared via the use of projective techniques. Expanding on the work of McWha et al. (2018), transformative travelers also suggest the presence of standards of morality when they engage in proselytism at home for transformative tourism and share criticisms toward mass tourism.

Figure 17. Interaction Ritual Chains of Transformative Travelers
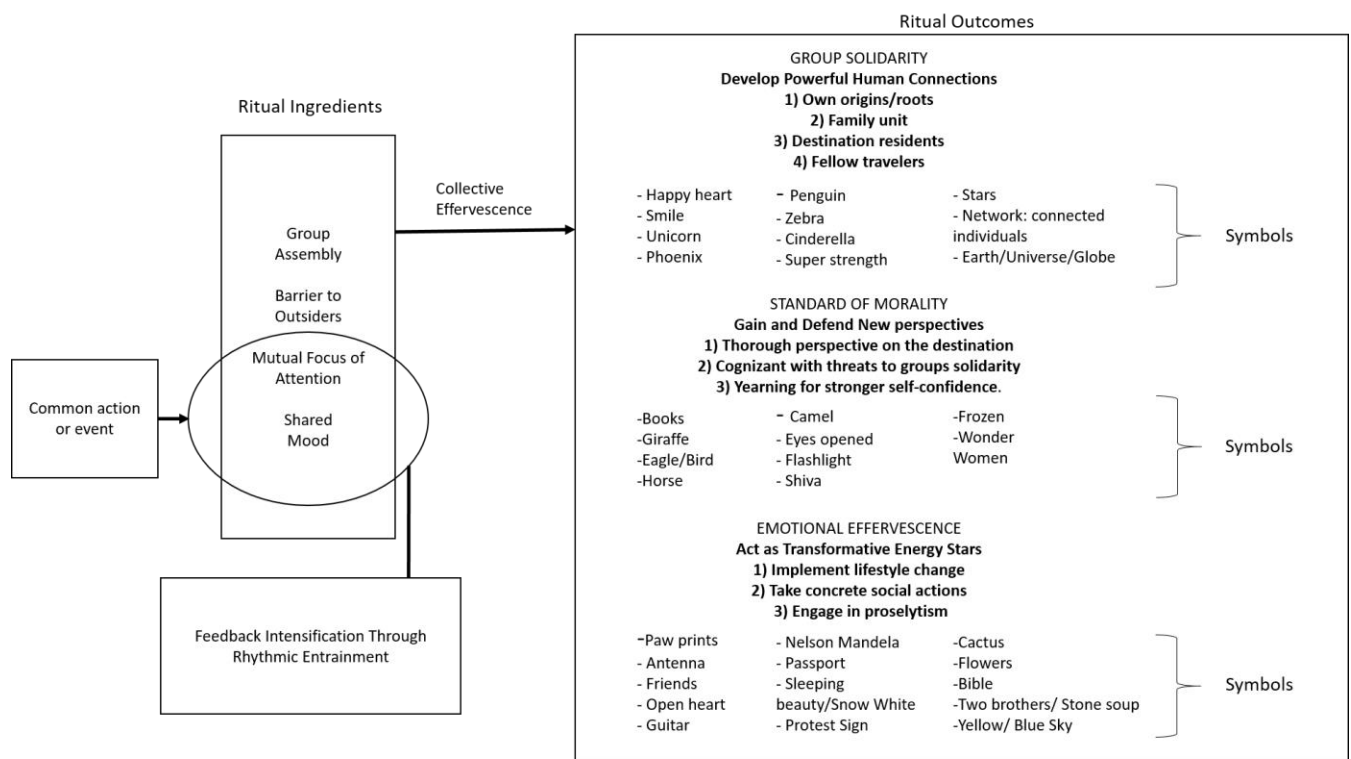
Based on Figure 17, one key finding concerns the importance of symbols and narratives related to magic and enchantment. Although Frost (2010) and DeCrop et al. (2018) mention magical elements when referencing the travelers' own transformation, the interviewed suggest that there is more to it, magic and enchantment do not simply apply to their own transformation, but also to destination residents. For example, Bobbie uses the mythical creature of the phoenix

to symbolize the strength and the resilience of Cuban residents. Similarly, Heather uses the magical power of super strength to describe how Mexican immigrants preserve their culture while facing racism and rejection in the United States. This specific use of a magical symbol suggests that the transformative travelers not only develop a tolerance for other cultures, but also come to deeply value and respect destination residents.

Another notable finding concerns the symbol of the explorer. While Robledo and Batle (2017) suggest that the symbol of the explorer is an interesting way to represent transformative travelers, others such as Germann Molz (2016) and Bruner (1991) fear that presenting transformative travelers as explorers can lead to misunderstanding because explorers can be associated with concepts like imperialism and white privilege. This fear is also shared by the transformative tourism practitioners during the pilot study. Rather than describing themselves in terms of omnipotent explorers, transformative travelers take on a more humbling approach and share vulnerable details of their personal history and background (Kirillova et al., 2017c). Through their symbols and narratives, travelers draw a more complex picture where they critically reflect on their own privileges and prejudices. For example, Emily draws a black heart in her before picture to symbolize the prejudices she used to have toward the Arab world. In her after picture, she reveals an open heart and a new understanding of the Israeli-Palestinian conflict. Another example comes from Greg's drawing in which before his trip his gaze and attention are solely focused on what is happening in the United States. After his trip, Greg self-reflects on his privileges and how they impact his worldview. This ability of transformative travelers to self-critique suggests that they do not shy away from complex situations and personal introspection. Rather, they desire to be exposed to different narratives and worldviews and are craving for authentic experiences that meaningfully connect them with destinations residents.

An additional finding expands on the work of Kirillova et al. (2017c) and Zahra (2011). While travelers share symbols and narratives related to existentialism (Kirillova et al., 2017c; Zahra, 2011), they link transformative travel with other emotions than the sadness felt during the disorienting dilemma. Rather, the finding reveals that transformative travelers express a strong from of hopefulness for the future that is directly translated into concrete actions. For example, Felicia's trip to Poland leads her to become a new self. Instead of focusing on the material aspect of her life, she decides to put all of her energy toward honoring the dead by being an advocate for freedom. Her concrete actions include giving speeches at churches and being a member of book clubs that discuss controversial and banned books. Similarly, hope of at the heart of Oriana's narratives and symbols. Inspired by the writing of Nelson Mandela on apartheid, she finds the strength to pursue her dreams and teach others her newfound passion for guitar playing. The transformative travelers' focus on hope is what motivates them to become Transformative Energy Stars and to generate a ripple effect of positive involvement and care in their own community.

The findings also have important managerial implications for transformative tourism practitioners such as tour operators and NGOs. The symbols and narratives shared by travelers can be used by transformative tourism practitioners to reformulate branding (Manning & Bejarano, 2017) and develop a strong brand identity (Clarke, 2011; Lounsbury et al., 2019). The interviews with transformative tourism practitioners reveal that they understand the importance of symbols and narratives but at times struggle to identify those that will deeply resonate with travelers. While many of the logos and names that are currently used by practitioners focus on adventure, interviews with travelers suggest that symbols associated with human connections and thirst for knowledge are more likely to deeply resonate with them. For example, travelers share a wealth of symbols suggesting a change in perspective such as birds, phoenixes, or horses.

Human connections are also the backbone of the travelers' transformative experience. Branding of transformative tourism organizations should reflect the importance given to human connections. Genuine interactions with residents, guides, and fellow travelers need to be front and center in the marketing content of transformative tourism organizations. For example, interviewed travelers share symbols that relate to hearts, connecting hands, breaking walls, network and opening doors. Those symbols can be used as a source of inspiration for transformative tourism organizations that are looking to revamping their branding.

Furthermore, transformative tourism practitioners can create marketing content that highlights strong family bonds (Germann Molz, 2016). Transformative tourism can be promoted as a way to strengthen ties between family members by going through deep and meaningful experiences together. For example, tourism practitioners can create a pre-trip booklet to share with travelers before their trip. This booklet can include activities that children and parents and/or grandparents can complete together to learn more about the local culture and history of the destination. Examples of activities in the booklet can include scavenger hunts, word puzzles, riddles, drawings, stickers, and trivia. Those activities create a dedicated bonding time between children and their parents/grandparents as they work together and get excited about their upcoming trip. Practitioners can create different booklets relevant to different age groups.

In light of the findings, transformative tourism practitioners might create marketing content that taps into the need to discover one's own roots and history (Santos & Yan, 2010). Practitioners can develop partnerships with organizations that focus on genealogy research. Travelers can be invited to create a personalized online account through transformative tourism organization's website. Through this online account, transformative tourism practitioners can build up excitement before the trip by offering information about travelers' ancestors and how

this information is tied with the places that will be visited as part of the itinerary using interactive maps.

Additionally, transformative tourism practitioners can use the findings to develop marketing content that generates trust and confidence in their ability to deliver on their promises (Ingram Bogusz et al., 2018). This trust and confidence can be fostered by tour guides, as transformative travelers mention that their connection with them is crucial to successfully navigate the transformative process. Therefore, a recommendation is for transformative tourism practitioners to develop those travelers/tour guides' connections pre-trip. As a solution, interactive content such as online videos can also be created to introduce the guides to the group of travelers before the trip. Guides can introduce themselves on a personal level by sharing their motivations to be a guide and their own personal transformative tourism experience. In the same fashion, transformative travelers mention the importance of connecting with their fellow travelers. To answer this need, closed groups can be created on social media for groups of travelers that will be going together on a trip. Transformative tourism practitioners can engage these future travel companions through ice-breaking activities and games that will allow them to get to know each other, avoid awkward first minutes when onsite at the destination, foster team spirit, and create a feeling of inclusion.

An equally important recommendation is for transformative tourism practitioners to use the tremendous power of Transformative Energy Stars to showcase their accomplishments in a convincing way (Fisher et al., 2017; Manning & Bejarano, 2017). Transformative Energy Stars are clients who have experienced a transformative trip and are eager to share their experience with others. They are keen to share positive word-of-mouth about the tour operators/NGOs with whom they have travelled. For example, transformative tourism practitioners can ask their past travelers if they would like to become ambassadors for their transformative tourism programs.

When potential transformative travelers contact an organization with questions about a trip, practitioners can offer to put them in contact with ambassadors who have been on this trip before. This will help prospective travelers to project themselves into the trip, create excitement, and a feeling of connection. Practitioners can also create videos, featured posts on social media and newsletter that showcase Transformative Energy Stars. The key is the make to content relatable, personal, and genuine so that potential travelers can identify with Transformative Energy Stars and their story of change.

As with any research endeavor, the present study suffers from limitations that are important to acknowledge. One of the main limitations is related to the time passed since the travelers' transformative experience. Informants shared transformative experiences that happened to them sometimes several years ago. The time passed might have altered the accuracy of their recollection. However, the transformative experience is so unique and powerful in nature that it is likely to have deeply marked the informants and left vivid memories (Kirillova et al., 2017c). The fact that time has passed can even be perceived as an advantage because it provide evidences of the enduring nature of transformation. An additional limitation is that all the experiences shared are positive to fit the goal of finding symbols from experiences that could be used to market transformative tourism. Transformative travels can results in negative experiences when the travelers are faced with a disorienting dilemma that they cannot overcome and ending the process of transformation(Illeris, 2014). The presence of possible social desirability bias also needs to be acknowledged. Informants might have sensed that the researchers were looking for testimonies of transformation and adjusted their narrative to fit this idea. We took steps to reduce social desirability by using projective techniques that encouraged the informants to focus on the task at end rather than its interpretation. The informants' drawings also reflect that they answered candidly and openly recognized when they used to have prejudices toward other cultures. The

candor of the drawings suggests that informants did not hold back, were not afraid of sharing

negative traits, and that projective techniques were useful in limiting some of the social

desirability biases. Another limitation is that travelers are asked to draw both the before and after

version of themselves after they have returned from their transformative trip which can taint the

way travelers see themselves. Nonetheless, Wu and Rau (2018) recently find that drawings

provide effective and valid data even when they focus on prior experiences. In the present study,

this finding is also corroborated by interviewed travelers who state that the simple action of

drawing projected them back into the experience and revive powerful memories both prior and

after the transformation has occurred. As with many transformative tourism studies, another

limitation is that the travelers are self-describing themselves as having been through a

transformative experience. Although the in-depth interview questionnaire provides insight into

the transformative nature of the travelers' experience, our investigation relies directly on their

own impressions of change (Robledo & Batle, 2017).

While there are some limitations, the present research also paves the way for future

studies. For example, future studies might test via experimental design which of the identified

symbols and narratives are the most effective in convincing travelers to take part in

transformative tourism. Based on the series of suggested symbols and narratives, transformative

tourism practitioners can also use focus groups to test how their target market reacts to a new

name and/or logo for their organization. For example, transformative tourism organizations that

cater to a more mature demographic of travelers might want to explore symbols (e.g., hearts and

holding hands) related to the family unit appealing to retirees traveling with their grandchildren.

Symbols related to the thirst for knowledge (e.g., books and flashlight) might appeal more to

transformative travelers who are looking to understand more about the socio-political history of a

country. Similar to the work of Simons (2019), future studies can investigate how the Interaction

Ritual Chains theory applies to online platforms where transformative travelers interact with each other. Those virtual communities can be used to examine the transformative travelers' prolonged sense of togetherness, group solidarity, and communion via the pictures they share on social media. Lastly, future studies can take on a critical approach and investigate whether the Interaction Ritual Chains theory applies to destination residents who are hosting transformative travelers. Studies can explore whether there are some common symbols and narratives that are at the heart of the destination residents' decision to work with transformative tourism organizations. Most importantly, as Smith (2017) judiciously points out in his book on transformative tourism, the most pressing factor when deciding of future research agendas is the need for societies to cohabitate and live sustainably on a planet with limited resources. Transformative tourism offers hope for change as travelers, practitioners, and residents work together to foster mutual respect and understanding.

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Appendix
Figure 1. Interview worksheet

Interview Worksheet

A) *Thinking back to your life transforming trip, please complete the following sentences as fast as possible. Any answer that you give is the right one because it's your opinion, what you think or feel.*

If this trip was an adjective/noun it would be_____

If this trip was a color it would be_____

If this trip was an emotion it would be_____

If this trip was an animal it would be_____

If this trip was a fairytale/folk story it would be_____

If this trip was a magical creature it would be_____

If this trip has magical power it would be_____

If this trip was a spiritual entity it would be_____

If this trip was a picture, it would depict_____

B) Small Drawing/Basic Sketch Activity #1:

"Draw/sketch a picture of yourself **before** your life changing trip in the space below. Remember: it is not about how well you draw but about what you draw. You are not going to be evaluated on your artistic ability. We are interested in learning about the symbols/narratives that travelers like yourself associate with their life-changing travel experience. The focus is on how you would describe the changes that have occurred in the way you see yourself before vs. after the travel. (How did you used to see yourself? How do you see yourself now? What was your state of mind? How is it different now? How has this life-changing travel experience transformed you? Your worldviews? Your interactions with others? You will be the one interpreting and giving meanings to the sketches by describing/explaining them during the phone interview.

Please complete your drawing by drawing: 1) something on the floor next to you, 2) something in your hands, and 3) something that you are wearing.

The last step is for you to fill the bubble with what your previous self would have say before to leave for this trip.

C) Small Drawing/Basic Sketch Activity #2:

*"Draw a picture of yourself **after** your life changing trip in the space below.*
Remember: it is not about how well you draw but about what you draw. You are not going to be evaluated on your artistic ability. We are interested in learning about the symbols/narratives that travelers like yourself associate with their life-changing travel experience. The focus is on how you would describe the changes that have occurred in the way you see yourself before vs. after the travel. (How did you used to see yourself? How do you see yourself now? What was your state of mind? How is it different now? How has this life-changing travel experience transformed you? Your worldviews? Your interactions with others?). You will be the one interpreting and giving meanings to the sketches by describing/explaining them during the phone interview.

Please complete your drawing by drawing: 1) something on the floor next to you, 2) something in your hands, and 3) something that you are wearing. The last step is for you to fill the bubble with what you would say after your trip.

Figure 2. Phone interview question

In-depth interview

Please think back to a travel experience that has influenced, or even altered, your view of the world.

- ○ *Please tell me about this travel experience. Where did you travel to? What was the length of stay? With whom did you travel?*
- ○ *What attracted you to go?*
- ○ *What were some of the most powerful moments?*
- ○ *How has this travel experience impacted the way you see yourself and the world?*
- ○ *Did you experience any cultural shock or felt at time disoriented/uncomfortable?*
- ○ *Did you engage in self-reflection during your trip as a way to digest everything that was happening? (by writing a journal, engaging in discussion with other travelers)*
- ○ *Did you do anything differently after you came back home?*
- ○ *How is this travel experience making you feel about yourself? How has this trip impacted your feeling of independence? Self-confidence?*
- ○ *If a friend was thinking about taking a trip similar to yours what would you like him/her to know?*
- ○ *Is there something else that you would like to add, maybe something that I did not ask but your feel is important and would like to add*

GENERAL CONCLUSION: WHERE DO WE GO FROM HERE?

Transformative tourism is full of opportunities for future research. By conducting these three studies and under the umbrella of sustainable tourism research focus**,** two main streams of research are identified: 1) developing sustainable planning policies and 2) implement sustainable tourism solutions. The potential that is offered by each one is discussed below.

Transformative tourism is inscribed in the research stream of developing sustainable planning policies. The main objective of this stream is to investigate how sustainable forms of tourism, such as transformative tourism, can be foster through the development of planning policies. During discussions with transformative tourism practitioners, they mention the creation of tourism pledges as a way to raise the travelers' awareness about their socio-environmental responsibility before they leave on their trips. The state of Palau recently makes the headlines when it announces that tourists wishing to travel to Palau will only be given a visa if they sign a pledge in which they engage themselves to behave in a way that is respectful of the local environment and culture (Griner, 2018). In the United States, the states of California and Hawaii are reported as working on their own tourism pledges (Lyte, 2019).The pledges act in a way similar to the honor code at university. Studies show that students are less likely to cheat when they are asked to sign the honor codes before as test as this signature acts as a refresher of their moral compass (Schild, Heck, Ścigała, & Zettler, 2019). Going back to the tourism setting, the pledge acts in an analogous way when travelers are reminded of their values before going on a trip to the destination. Future studies can explore the effect of pledges on transformative outcomes.

Another area where the development of sustainable planning policies overlaps with transformative tourism concerns policies supporting the creation of new businesses and jobs.

With the increasing concerns and threats posed by global warming, there is a growing interest in ways to encourage coal-mining communities to reconvert their economy to sustainable tourism (Simpson, 2019). The Appalachian Regional Commission makes the news when it announces the creation of a $44 million incentive package to investigate the reconversion of coal communities into less environmentally activities that can provide jobs and showcase the cultural, recreational, and natural assets of the area (Wasserman, 2019). Transformative tourism offers an interesting theoretical lens to investigate which policies can help communities tackle economic reconversion and how tourism can offer the opportunity for meaningful interaction between travelers and destination residents that are beneficial for all involved.

While the first stream of research focuses on the development of sustainable planning policies, the second stream of research explores how those policies can be concretely applied on the ground. When exploring concrete applications, there is a specific need to investigate more in-depth how transformative tourism is linked with the concepts of power, inequality, and empowerment (Christie, Carey, Robertson, & Grainger, 2015; Walter, 2016). Few studies have used critical inquiry to better understand the travelers' transformative experience through the use of qualitative methodology (Laing & Frost, 2017; Yankholmes & McKercher, 2015). A notable exception is the work by Yankholmes and McKercher (2015) who examine the travel experience of African Americans traveling to Ghana to connect with their ancestors (Bruner, 1996; Yankholmes & McKercher, 2015). Pushed by a desire to take on a more critical approach to transformative tourism, several local transformative tourism practitioners are trying to develop programs where travelers are educated about the untold stories of minorities group at the destination (Balch, 2019). For example, the *Entrée to Black Paris* tour receive several accolades for the local guides' focus on telling the untold story of French from African descent who have influenced the world's history/culture (Jenkins, 2013). Adding on a feminist perspective, the

local guides of the *Women of Paris Essential Walk* teach travelers about Paris' inspirational women who have fought against prejudice, made contributions to French society, but whose stories were left out from history books (Goodman, 2017). Future studies can investigate across different countries, how transformative tourism tours are an opportunity for travelers to be immersed in the local culture and understand more deeply the struggle of minorities while also learning about inspirational historical figures, and changing their perspective on a country's history/culture.

In conclusion, there are opportunities to investigate connections between transformation tourism, sustainable planning policies, and the implementation of sustainable tourism solutions. The present dissertation and each manuscript open the doors to future studies that encourage the development of tourism programs with purpose that adapt to the needs of all parties.

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