

## Glocalization Management Strategies of NGOs Engaged in Transformative Tourism

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# **Glocalization Management Strategies of NGOs engaged in Transformative Volunteer Tourism**

## **ABSTRACT**

*Glocalization aims at 1) adapting organizational structures to the cultural specificities of a given location, 2) developing services that are customized to the residents' expectations, and 3) encouraging residents to appropriate and transform global services to fit their tastes and preferences. The present study will explore how Non-Governmental Organizations (NGOs) could employ globalization strategies in order to develop an alternative form of volunteer tourism that encourage the creation of transformative learning experiences. The glocalization strategies for NGOs will be analyzed in terms of encouraging cultural understanding from the volunteers, including reflection about local symbols and culture, adapting human resource strategies, and communication.*

Key Words: transformative volunteer tourism, NGO, glocalization

## **INTRODUCTION**

Increasingly, Non-Governmental Organizations (NGOs) are becoming involved in tourism. This is most commonly categorized as volunteer tourism (Wearing, 2001). However, some NGOs are discovering that the most successful and rewarding forms of these exchanges are not based in a volunteer framework reflecting a one-way flow of resources but are more accurately categorized as transformative, with both outside participants and local stakeholders being positively impacted by the experience (Knollenberg et al., 2014). Transformation may be manifest by changes in worldview, skill development, or behaviors (Coghlan & Gooch, 2011) with an appreciation of the norms and values of all involved. As a result, it is argued that these programs are differentiated from more disengaged and commodified forms of volunteer tourism (Higgins-Desbiolles, 2006).

The transformative volunteer tourism framework described above is an excellent example of the concept of glocalization, which is based on a two-way exchange between outside forces and local stakeholders (Roberston, 1995). It has been well-documented that the local culture is impacted by the injection of tourists and international corporations that support the tourism industry. A lack of awareness of and respect for the local culture by these outside forces can lead to negative impacts such as acculturation and resentment that ultimately harm the success and profitability of the business (Ritzer, 2011; 2016). The concept of glocalization suggests that in order to be successful, international organizations need to tailor their business culture, products and services to the culture and preferences of the local community (Simi & Matusitz, 2015). This approach also assures that local residents have the power to influence global corporations and international tourism flows (Matusitz, 2016).

However, NGOs have fewer resources than for-profit organizations to channel toward the study and development of glocalization strategies for their transformative tourism initiatives (Brière et al., 2015; Mannan, 2015). Not surprisingly, there is also a gap in the management literature in this area. While we do know that NGOs involved in tourism initiatives that tailor their programs to local cultures are more likely to be positively perceived and to conduct tasks more effectively (Chevrier & Viegas-Pires, 2013), little is known about existing glocalization strategies NGO managers are utilizing to tailor their transformative tourism programs to local cultures. It is important to fill this gap, because NGOs require specific management skills in terms of balancing

budgets, training, cultural diversity, dispersing the chain of command, and contending with isolated field offices (Brière et al., 2015). Therefore, the present study will explore how glocalization strategies can be employed by NGOs in order to foster a transformative learning experience that is inclusive and respectful of cultural diversity.

## **LITERATURE REVIEW**

### **Transformative Tourism: an Alternative experience.**

The concept of the transformative experience has been borrowed from the field of education to study the learning process in the adult population (Coghlan & Gooch, 2011). Mezirow (1990) defines a transformative experience as “the process of becoming critically aware of how we perceive, understand, and feel about our world, of reformulating these assumptions to permit a more inclusive, discriminating, permeable, and integrative” worldview (Mezirow, 1990, p. 5). In other words, individuals who go through a transformative learning experience are able to reflect on how their cultural norms and past experiences have an effect on their perceptions (Taylor, 2007, 2008). Mezirow (1994) defines ten steps individuals go through during a transformative experience. During these ten steps, individuals encounter a new schema that triggers incomprehension, reflect on how sociological and subconscious biases might have impacted their initial negative reactions, adjust the lenses through which they see the world, and come to an understanding (Mezirow, 1997, 1999).

The literature is filled with examples of volunteer tourism which include transformative components (Coghlan & Gooch, 2011; McGehee, 2002; Walter, 2013). Volunteer tourism has evolved from its more restrictive early definition (Wearing, 2001) to include a broader range of discretionary activities which are educational, adventure-oriented, and mutually rewarding to both volunteers and hosts (D'Amato & Krasny, 2011; Deville, Wearing & McDonald, 2016; Lyons & Wearing, 2012; McGehee & Santos, 2005). Although Guttentag (2009) and many others have justifiably argued that volunteer tourism perpetuates the cultural hegemony of Western culture, there are less commodified examples across the world which consist of more transformative experiences for all involved (Coran, 2011; Lo & Lee, 2011). For example, in her case study, Zahra (2006) found volunteer tourism at the heart of the transformative learning principle through which individuals re-evaluate their cultural schema by participating in deeply meaningful and cathartic experience.

Recently, Knollenberg et al. (2014) offer a more concise framework in which to study volunteer tourism. Instead of Mezirow's cumbersome ten steps, Knollenberg et al. (2014) propose three dimensions to analyze transformative learning: “self-reflection, intercultural dialogue with others, and intercultural experiences” (p.928). The first dimension of transformative tourism includes engagement in self-reflection about how social norms and culture influence perception of the world in terms of commodification level, lifestyle and relationship building (Deville et al, 2016; McGehee, 2002; Tarrant et al., 2014). Research has shown evidence of this form of transformation amongst volunteer tourists specifically in the areas of poverty and its challenges (Zarandian et al, 2015), materialistic behaviors (McGehee & Santos, 2005), self-actualization (Barbieri et al., 2012), trust levels (Alexander, 2012), cultural awareness (Pan 2012), as well as pro-social and sustainable behaviors (McGehee et al. 2014; Tarrant et al., 2014).

The next phase of transformative tourism includes a component of intercultural dialogue with others. Structured and unstructured intercultural dialogue exists in numerous volunteer tourism experiences and is often reported by volunteers as one of the most meaningful components of the experience (Zahra & McIntosh 2007; Zahra and McGehee, 2013). When residents have participated in intercultural dialogue in transformative volunteer tourism, they described an increased sense of belonging to a global community (Deville & Wearing, 2013) and empowerment (McGehee et al., 2014).

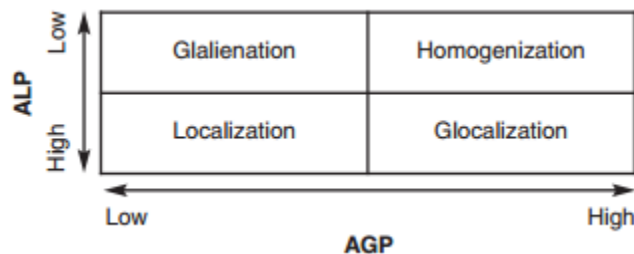
The final phase of transformative tourism consists of additional intercultural experiences beyond dialogue (Knollenberg et al, 2014). These active forms of engagement include interactive cultural performances, hands-on arts, music, or sports activities, or storytelling. Residents who have participated in intercultural experiences as part of transformative volunteer tourism report increases in pride regarding their religiousness (Zahra, 2006), strengthened cultural attachment both within their communities and with their guests (McIntosh & Zahra, 2007), and social capital (Zahra & McGehee, 2013).

As with transformative education, the ultimate goal of transformative tourism is to encourage adults to take on new perspectives in order to gain a deeper understanding of the world (Taylor, 2007; Wearing et al., 2016). Volunteer tourists will only succeed in achieving a transformative experience if they are able recognize, engage, and reflect on the experience (Coghlan & Weiler, 2015). NGOs are key actors in transformative forms of volunteer tourism because they design programs, select which projects are conducted, and determine the level of guest/resident interaction (Walter, 2013). It is this specific form of volunteer tourism which we are focusing on for this study.

### **Glocalization and NGOs engaged in transformative tourism**

The concept of glocalization was created to fill a theoretical gap in the conceptualization of globalization (Simi & Matusitz, 2015). Robertson (1995) commented that globalization was too frequently being described as an outside force that destroyed defenseless local cultures. To counter this misconception, he coined the term glocalization to reflect the idea that the world was constantly being remodeled via a two-way interaction between global and local forces. Glocalization describes the efforts of international corporations to tailor their products to match the locals' preferences (Matuzitz, 2016). Steenkamp & de Jong (2010) expanded Robertson's theory (1995) by adding the notion of alienation, which refers to consumers' negative attitude toward all form of consumerism (Figure 1). They also adapted the model by replacing the term globalization with homogenization (i.e.; when consumers have a positive attitude toward global goods and negative attitude toward local goods).

Figure 1. "Consumer Attitude toward global (AGP) and local products (ALP)"



Steenkamp & de Jong (2010) p.20

Researchers have also used the concept of glocalization to study how “local cultures adapt and redefine any global cultural product to suit their particular needs, beliefs and customs” (Giulianotti & Robertson, 2004, p.546). According to this definition, locals decide which part of a global culture they want to adopt, modify, or adjust to their specific lifestyles (Simi & Matusitz, 2015). The great innovation of the glocalization concept was that locals were not portrayed as passive actors in the process (Matusitz & Lord, 2013). Instead, locals have the power to create their own personal vision of a hybrid, creole, and cosmopolitan culture (Roudometof, 2015). Thus, the locals’ culture is enriched at the nexus between the global and local.

The glocalization of for-profit organizations can take several forms: study aboard programs reducing cultural shock among international students (e.g. meeting with teachers to learn about the academic system), inclusion of local symbols and cultural traditions (e.g. Subway in India offering specially designed vegetarian menu), respect of traditional work culture (e.g. Walmart in Argentina extending the workers’ morning break to accommodate traditional greeting time), and communication strategies (e.g. Hong Kong Disneyland brochures designed to explain to visitors what they will experience when riding roller coasters) (Matusitz, 2011, 2015, 2016; Simi & Matusitz, 2015). The concept of glocalization has also been previously applied to NGOs that deal with crisis recovery (Gaillard & Mercer, 2013).

More specific to the domain of volunteer tourism, NGOs that operate international projects must adapt to differences in political and bureaucratic systems, familiarize with cultural differences among the staff members, become knowledgeable of local customs, connect with remote field offices, and find way to access relevant information (Watkins et al., 2012; Brière et al., 2015). Further, the success of transformative volunteer tourism projects rely on the NGOs’ ability to develop ties with local communities that are based on mutual respect and trust. Thus, the main goals of NGOs working on transformative volunteer tourism are to empower the local residents while offering an ecological, social, and economical alternative to mass tourism (Wearing et al., 2005).

However, NGOs sometimes struggle to align their ideological stances with the reality of the environment (Prince & Ioannides, 2017). Sin (2010) conducted interviews with local staff members in Cambodia about their perceptions of various NGOs with which they conducted volunteer tourism. These participants mentioned that NGOs sometimes make requests that are difficult to accommodate. When residents wanted to suggest a new project they had fill a complex request for proposal thus hindering the possibility of spreading beneficial projects to more isolated areas. Other studies mentioned that NGOs are struggling with finding sources of funding (Prince & Ioannides, 2017), assigning tasks to volunteers (Barbieri et al., 2012), over-depending on volunteers (Frilund 2015), and undermining local political power (Sin, 2010).

In the recent literature, there have been calls to further analyze the monitoring process applied by NGOs to recruit volunteers, define projects, and evaluate results (McGehee, 2014; Blackman & Benson, 2010). To improve the match between the volunteers’ expectation and volunteer tourism projects, Atkins (2012) developed an algorithm that takes into account the volunteers’ psychographic profile and the NGO’s activities. Similarly, Walter (2013) suggested a framework to enhance transformative learning among volunteer tourists based on encouraging reflection about cultural and sustainable awareness, analyzing symbolic schema, and broadening points of view. Although past studies have explored the role of cultural adaption in volunteers (Lee

& Woosnam, 2010), no research has yet explore if and how glocalization strategies can facilitate the development and successful implementation of transformative volunteer tourism projects by NGOs. Hence, the objective of the present study will be to explore how NGOs currently employ glocalization strategies to foster a transformative learning experience.

## **PROPOSED METHOD**

Analysis of the existing literature in volunteer tourism revealed support for the notion of the transformative volunteer tourism experience. Additionally, current research in the area of glocalization and tourism provide a justification for the examination of glocalization and NGOs engaged in transformative tourism operations. Based in these findings, in-depth interviews of NGO leaders engaged in transformative tourism (as both self-defined by the informant and within the framework established by the literature review) will be conducted in order to learn about the presence of existing glocalization strategies being utilized to tailor their transformative tourism programs to local cultures. One of the authors has a long-term collaboration with some of the most prominent NGOs specializing in volunteer tourism. These NGO leaders will serve as the initial point of departure for data collection. Following a snowball sampling approach, additional NGO leaders will be contacted to take part in the study. Additionally NGO websites and other publications will also be analyzed for evidence of glocalization strategies being utilized within their transformative volunteer tourism activities.

Based on the work of Lincoln and Guba (1985), Huang recommends the use of four processes to address the issue of trustworthiness: “credibility (internal validity); transferability (external validity); dependability (reliability); confirmability (objectivity)” (2008, p.4. Credibility will be addressed by using different methods of data collection. In addition to in-depth interviews, the authors will gather press releases, reports, contextual information about each host countries, and conduct a website analysis about each NGO. Transferability will be strengthen by gathering information from NGOs that conduct projects in multiple countries. This will allow researchers to look at variation in glocalization strategies across different cultures and organizations. Dependability will be reinforced by keeping a detailed record of the research procedures from the development of the method to the conclusions (McGehee, 2014). Lastly, confirmability will be assessed by cross-checking the collected data. The researchers will immerse themselves in the data and develop codes through which the data will be analyzed (Zahra & McIntosh, 2007). Both researchers will review the themes and share the findings with informants for cross-checking.

## **EXPECTED OUTCOMES**

These interviews will be the basis on which the researchers will formulate propositions. At the present time, the propositions have not yet been formulated so this section will discuss tentative outcomes that could be expected from the study. Extending on the literature of glocalization and transformative volunteer tourism, the following four themes are suggested as the basis for tentative propositions to study transformative travels: **1)** glocalization through strategies to mitigate cultural shock (Matusitz, 2016), **2)** glocalization of NGOs through the inclusion of local symbols and cultural traditions (Matusitz & Forrester, 2009), **3)** glocalization through adjustment to human resource strategies (Matusitz, 2011), **4)** glocalization through communication strategies (Simi & Matusitz, 2015).

Travelers participate in transformative trips are likely to face some emotional or physical challenges (McIntosh & Zahra, 2007).

*Proposition 1: NGOs that implement glocalization strategies to mitigate cultural shock will help travelers to have a clearer understanding of the assigned tasks, understand cultural differences, and coach travelers through the successful negotiation of challenges that could arise once on site.*

NGOs influence transformative learning by facilitating intercultural dialogues and experiences (Coghlan & Gooch, 2011; Knollenberg et al., 2014).

*Proposition 2: NGOs that implement glocalization strategies to include discussions and reflections about the local symbols and cultural traditions will be more successful in encouraging transformative learning.*

NGOs sometimes failed in implementing transformative learning experiences due to their structural specificities: isolated field offices, language barrier, unrealistic expectations and overreliance on volunteers for clerical tasks (Brière et al., 2015; Prince & Ioannides, 2017).

*Proposition 3: NGOs that implement successful glocalization strategies in terms of human resources will adapt its leadership and management style to different cultures, promote cultural awareness among staff members, respect the specificities of the local work culture, and encourage communication.*

NGOs can sometimes take actions that disturb the social and political settings of the resident community (Sin, 2010), notably in terms of task assignment and inclusiveness (Barbieri et al., 2012). These failures in communication can hinder transformative learning (Lo & Lee, 2011).

*Proposition 4: NGOs that implement glocalization through their communication strategies will be more inclusive and respectful of the residents' opinions in terms in of project selections, task assignments for the volunteers, and guest/host interaction.*

## **CONCLUSION AND DISCUSSION**

The objective of the study is to explore how some NGOs implement glocalization strategies and how these strategies influence the success of transformative volunteer tourism experience. Data collected in this study will be used to define specific research propositions for future research in the area of transformative volunteer tourism. This study of course will have limitations. It is exploratory in nature, as very little work has been conducted in this area. The informants of the study are self-defining as being part of a transformative volunteer tourism program. The study is also focusing only on NGO leaders. Future studies should include the opinions of both the residents and travelers regarding the NGO's ability to implement glocalization strategies.

In conclusion, this research will offer new perspectives on transformative travel and intercultural understanding. Expanding our current knowledge about glocalization and transformative education is likely to be relevant for NGOs and offer valuable insight on how to implement strategies that are culturally inclusive and encourage a transformative approach to travel.

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