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A pilot study on guiding travelers through transformation

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Abstract

Rooted in the Transformative Learning Theory, transformative travel facilitates travelers' self-reflection, generates powerful emotions, and encourages them to develop more inclusive views. While transformative travel research mainly focuses on visitors' perspectives, local volunteers' roles, such as docents, in guiding these experiences are left unexplored. We examine ways docents at a Museum can guide travelers through transformation by integrating the concept of emotional intelligence into the Transformative Learning Theory.

Introduction

Transformative travel originates from Mezirow's (1991) Transformative Learning Theory, which focuses on ways adult learners can develop more inclusive views (called meaning perspectives) (Christie & Mason, 2003). Researchers extensively cover the travelers' side of transformative experiences by focusing on outcomes such as an increased sense of agency (Freidus & Caro, 2021), well-being (Wolf, Stricker, & Hagenloh, 2015), and mindfulness (Dillette, Douglas, & Andrzejewski, 2019). However, the perspective of locals, who facilitate the creation of transformative travel experiences, is limited, and calls are made to address this gap (Freidus & Caro, 2021).

The current study is conducted at the Illinois Holocaust Museum and Education Center (IHMEC). On average, 130,000 people visit this Museum each year, making it the third Holocaust museum in the world, with 40% of these visitors being out of state and 70% being from Illinois (IHMEC, 2021). More precisely, we focus on docents, which Martinello and Cook (1981) define as "community volunteers who serve as museum guides" (p. 9). Docents are a compelling group to gather locals' perspectives on transformative travel because of their dual identity as 1) local community residents and 2) volunteers who undergo intensive training to provide educational experiences to visitors (Stamer, Lerdall, & Guo, 2008).

We selected IHMEC as a research site because it is purposefully designed to facilitate transformative experiences. IHMEC's transformative purpose is reflected in its mission statement of "Remember the Past, Transform the Future," and transformation is a common theme in each Museum's exhibits. For example, the Museum's permanent Zev and Shifra Karkomi Holocaust Exhibition is intentionally designed by Survivors to encourage visitors to develop inclusive views and take action to defend oppressed individuals. In this exhibition, visitors are immersed in the past and learn about the devastations caused by Nazis propaganda, the Holocaust, and the resilience of Survivors.

Another reason we select IHMEC to investigate transformative tourism experiences from the locals' perspective is that the Museum's creation results from a community-based initiative. The Skokie community is the chosen home of 7,000 Holocaust Survivors to rebuild their life after the end of WWII. In 1979, a Neo-Nazi group targeted Skokie as the location of its march precisely because it is the home of so many Survivors. In answer to the message of hate spread by Neo-Nazis, Survivors came together to open a museum and educate the public about the dangers of hatred in all its forms and advocate for human rights. At IHMEC, docents all live in Skokie and its surrounding communities, which can provide insight into transformative tourism from community members who volunteer to interact with the public and facilitate transformative experiences.

The concept of emotional intelligence can offer relevant insights into the docent's views of their roles as transformative educators within the theoretical lens of the Transformative Learning Theory. Emotional intelligence is defined as "the ability to monitor one's own and other's feelings, to discriminate among them, and to use this information to guide one's thinking and action" (Salovey & Mayer, 1990, p.189). This focus on one's ability to manage emotions in self and others is important to understand transformative educators' roles when considering that transformative experiences can generate powerful emotions in travelers (Freidus & Caro, 2021).

Therefore, we employ transformative learning as a theoretical lens to investigate how docents leverage their emotional intelligence in their roles as transformative educators.

Literature review

Travelers identify their interactions with destination residents as facilitating their transformative process by enhancing the authenticity of their experience (Laing & Frost, 2017), fostering empathy (Kirillova, Lehto, & Cai, 2017), and reinforcing their sense of belonging in a global community (Soulard et al., 2021). However, the tourism literature provides limited insights into the possibility of locals being themselves transformed by their actions as transformative educators (Teoh, Wang, & Kwek, 2021).

A notable exception is a work by Walker and Weiler (2017) in Tonga that measure local guides' perceptions of their job's transformative aspects. They find that local guides report transformative outcomes such as protecting whales and being tour guides are becoming an inherent part of their identity and life goals. However, understanding the specificities of the impacts on their identity and identifying these transformative life goals are out of their research goals. Focusing on homestay as an outlet for transformative travel experiences, DeCrop, Del Chiappa, Mallargé, and Zidda (2018) find that hosts benefit from transformative tourism experiences by meeting new people, developing friendships with guests, and being exposed to cultural diversity. This experience is especially transformative for hosts who cannot travel internationally because they live in a country where residents seldom get their travel visas approved (DeCrop, Del Chiappa, Mallargé, & Zidda, 2018). Although these studies acknowledge that transformative travel is co-created between locals and travelers, an in-depth understanding of how locals can be potentially transformed by their interactions with travelers is out of the scope of their respective research.

The conceptualization by Salovey and Mayer (1990) of emotional intelligence is relevant to transformative tourism experiences (Suchy, 2006). While the locals' perspective of the significance of emotions in transformative travel is left unexplored, researchers focusing on the travelers' perspective indicate that identifying emotions in self and others is significant for them to go through transformative experiences. Additionally, Pond (1993) states one of the key abilities a guide can possess is generating a feeling of empathy in visitors. This visitors' feeling of empathy can, in turn, potentially foster a sense of ethical responsibility toward others if visitors cultivate it through engaging in self-reflection (Sheldon, 2020). While these studies acknowledge the importance of empathy in the transformative process of visitors, the ways guides perceive their ability to identify emotions in themselves and others to facilitate transformation is not part of their respective research objectives – paving the way for further studies.

Methodology

We implemented an interpretative phenomenological analysis that was underpinned by hermeneutic phenomenology. Hermeneutic phenomenology recognizes that individuals are enmeshed in cultural, sociological, political, and historical contexts from which they cannot be detangled (Eatough & Smith, 2008). Those contexts provide the necessary layers of understanding to comprehend how individuals, such as docents, process their emotions (Malone, McCabe, & Smith, 2014). In alignment with interpretative phenomenological analysis principles, we anchored our ontology in the belief that individuals interpret a similar event in different manners (Bailey, 2007). Our axiological stance acknowledges that as researchers, our interpretation of sociocultural contexts influences our choice of theoretical lens, method choices, and data interpretation (Ponterotto, 2005). Through this project, we actively engaged in discussions concerning how our own experiences impacted these choices and our views on transformative experience, the docents' roles when interacting with visitors, and our own experience with transformative tourism.

We interviewed 31 docents between April 2021 and April 2022 and conducted these interviews via Zoom or telephone to provide participants with time flexibility. Directors at the Illinois Holocaust and Education Center sent a recruitment email to all 200 docents, inviting them to be part of the research project. As a result, 41 docents expressed an interest in being interviewed, and data saturation was reached (Creswell & Báez, 2020) after the twenty-ninth participant. Two additional interviews were already scheduled, achieving 31 in-depth interviews. The interviews lasted between fifty minutes and an hour, with two shorter interviews lasting thirty-five minutes because these docents had a time conflict with providing guided tours.

The semi-structured interview guide for the in-depth interviews included questions about how their perceptions of being transformative educators, interactions with travelers, most memorable encounters with travelers, and their motivations to become docents. Following this interview guide, the researchers started with broader questions asking docents about their motivations to become volunteers before narrowing it to their interactions with travelers, their views on what it means to be docents, and how they facilitate transformation in visitors (Soulard, McGehee, & Stern, 2019). We also decided to include a photo-elicitation component where we asked docents to provide a picture representing their emotional impressions when giving tours to visitors. This approach to data collection allowed us to enhance tactical authenticity (Lincoln & Guba, 1986) because the docents actively produced knowledge by identifying pictures representative of their lived experience and participating in member checks. We also underscored ontological authenticity because the participants assigned meanings to their pictures rather than the researchers.

We followed the interpretative phenomenological analysis's principles of the double hermeneutic and the hermeneutic circle for the data coding process (Smith & Shinebourne, 2012). The double hermeneutic principle recognized that interpretation occurs at different levels, for the researchers during the data analysis and for the participants during the interviews (Larkin, Watts, & Clifton, 2006). As part of the double hermeneutic process, the lead author self-reflected on personal views and biases to better understand how they can influence the research process and to grasp the nuances and empathetic understanding associated with the docents' experiences (Eatough & Smith, 2008). Further, docents were themselves developing a more profound sense of their roles as transformative educators by selecting a representative picture and talking about their experience during the interview.

When engaging in the hermeneutic circle, researchers employed a multiple layers analysis where they considered how the specifics of an individual's experience connected with the whole narrative, how the narrative itself was linked with the specifics, and how both were entrenched in sociocultural contexts (Eatough & Smith, 2008). The lead author began by coding one transcript at a time, engaged in multiple readings of this transcript, and wrote notes along it. These notes covered the topics each respective participant discussed, the surrounding circumstances, the emotions being mentioned, and early interpretative observations (Billock, 2017).

The next phase included regrouping these early interpretative observations into subthemes describing the main idea being covered (Smith, Jarman, & Osborn, 1999). Importantly, these subthemes were still anchored in the specifics of the participant's narrative (e.g., living in Skokie when the neo-Nazi march was scheduled) and not yet overarching across transcripts (Eatough & Smith, 2008). The researcher next undertook another round of coding where the subthemes were considered through the lens of Transformative Learning theory (Pietkiewicz & Smith, 2014). The objective was not to constrain the subthemes into the theory but to consider whether they offered additional context (e.g., understanding emotions associated with the Skokie community undergoing a collective transformation through the Survivors' decision to open the Museum). The hermeneutic circle occurred over successive readings, and the entire docent's narrative was present in the researcher's mind as these subthemes were identified (Pietkiewicz & Smith, 2014).

In the last phase, the author conducted an integrative analysis where the themes were juxtaposed across the different transcripts (Pietkiewicz & Smith, 2014). The author identified convergences, differences, and overarching themes (e.g., collective transformation: transformative educators and their community). The hermeneutic circle was employed here as the author organized themes in each docent's narrative to build a high-level perspective encompassing the group's experience.

We aimed to enhance the trustworthiness of the findings by following Decrop's (2004) recommendations on credibility, confirmability, dependability, and transferability. Credibility was strengthened by sharing detailed information about the participants' experiences to offer a deeper understanding of the surrounding sociocultural contexts. Confirmability was underpinned by examining the conjunction between the picture and verbal narratives of the participants (Maxwell, 2012). Dependability was enhanced by keeping track of emerging codes and themes evolutions. Finally, transferability was reinforced by using a member check. We also reinforced validity by using a qualitative within-method triangulation approach where we combined two methods to collect data via photo-elicitations and in-depth interviews.

Discussion

Data for this study is in the early data analysis and interpretation phase. Two early themes emerge from the interpretative phenomenological analysis: 1) challenging the travelers' meaning perspective and 2) Encouraging travelers to explore new beliefs and attitudes through contextualization.

Challenging meaning perspectives are at the heart of the Transformative Learning Theory (Mezirow, 1991), where individuals question their assumptions during self-reflection. To facilitate self-reflection in others, docents leverage their emotional intelligence by using their emotions to opt for a successful educational approach to challenge the travelers' meaning perspectives. This canalization of emotions to facilitate self-reflection is especially visible when docents are correcting false information about the Holocaust that distorts the travelers' meaning perspectives. As she reflects on addressing misinformation, Leah explains:

Figure 1. Leah's selected picture



I feel very, very strongly about emphasizing resistance and resilience. I really have had people say things to me, like, 'why did the Jews go like lambs to the slaughter? It's absolutely not true. That did not happen. From the very beginning, there was resistance, and one of the photographs I sent you was the first one that I saw in the museum that said that to me. It's a picture taken in 1932 of a menorah in a window opposite from a Nazi headquarter in Kiel, Germany. Rabbi Posner and his family lived in the apartment, and it was Hanukkah and it is tradition to put the menorah in the window. So this was one of the first ones that caught my eye and made me think about the importance of resistance. And so I include it every time I go through the museum with a group, I will mention this. I'll say, what do you see in this picture? I think that's a menorah and it's in front of Nazi headquarters. And I said: Well, you know, what does a menorah say about the person in the window? And they say: Well, it says that they're Jewish, right? Did it take courage to put that menorah in the window and that kind of thing? Yes. Is that resistance? Yes. So it's a way of reestablishing facts.
Leah, 70s, 4 years of experience as a transformative tourism educator

In the present testimony, Leah utilizes her feeling of indignation toward misinformation to develop a cognitive action plan. In this plan, she identifies an artifact (i.e., the picture of the menorah) that she employs as the basis of a Socratic method (Sedova-Hotaling & Soboleva, 2016) in which she engages the travelers' in a series of questions about their interpretation of the picture. By doing so, Leah exposes mistruths and challenges travelers' meaning perspectives about Jewish resistance. In their study on transformative servicescape, Magee and Gilmore (2015) interview managers at Auschwitz who mention that emotions can be dangerous when they are incorporated into the guides' discourse because emotions can be used to manipulate people. We build on their study by suggesting that docents draw on their own emotions, not to manipulate travelers, but use these emotions as motivational drivers that something need to be rectified about a prejudicial idea. To be clear, the docents do not unload their emotions on travelers but capitalize on their emotions to think about ways to get their message across.

Additionally, docents share that their aptitude to process emotions in others helps them make travelers feel comfortable to engage with them, which facilitates the docents' ability to guide them in exploring new provisional roles. In the Transformative Learning Theory, provisional roles occur when individuals try on new identities (Mezirow, 1991). When discussing his aptitude to recognize transformation in travelers, Oliver details a specific encounter he had with a traveler that exemplifies how he encourages travelers to try on new identities:

She [the traveler] seemed troubled throughout the whole walkthrough. She mentioned that she was born in Germany but came to America many, many years ago. And she kept on asking me questions. That gave me kind of an instinctive insight into the fact that I was dealing with somebody who was troubled on a personal level for a reason, but she didn't share it with me. I tried to engage her, and to say to her on more than one occasion, 'if there's something personal that you'd like to share with me, feel free to do so'- nothing. When we got done and came out into the lobby of the museum, she said, 'Can I talk to you?' And I said, 'Sure.' And she said my grandfather was a Nazis And I can never forgive him for it. And that's the reason why I came to the museum." And I said, 'I want to tell you something. I have great respect for the fact that you came to this museum.' She said to me, that it's bothered her whole life to know that her grandfather was a Nazi. And I said, 'What you need to do is bring other people to this museum, and not promote the fact that your grandfather was a Nazi. Talk about the fact that you live here in America, and you're disturbed by what's going on in our country and other countries around the world with genocidal kinds of events, and that it's important that we understand the message. What you're doing here today, is you're making such a difference, by coming!

Oliver (M), 60s, 5 years of experience as a transformative tourism educator

Oliver is encouraging this traveler to view her role and identity differently by moving away from experiencing shame to being someone who can be proud that she is educating people about genocides. In their conceptual paper about transformative tourism, Bueddefeld and Duerden (2022) astutely mention that tourism researchers focus too much on the transformative steps and not enough on the learning outcomes. They advise researchers to focus on the four learning types originally included in Mezirow's (1991) Transformative Learning Theory. All of these learning types center on cognitive aspects of are core elements of the transformative process: 1) instrumental (e.g., new skills and knowledge), 2) introspective (e.g., self-reflection), 3) communicative (e.g., using language), 4) transformative (e.g., adjust one's behavior).

From the transformative educators' perspective, we add to their work by considering two additional ways of learning. One is *instinctual learning* which is learning from one's instinct, intuition, and body reactions and movements. The other is *emotional learning*, which we conceptualize as drawing on one's emotional intelligence capacity. Instinctual and emotional learnings are exemplified by Oliver's expressing that he felt "an instinctive insight into the fact that I was dealing with somebody who was troubled on a personal level." Using his emotional perception, Oliver uses instinctive and emotional learning to decode this traveler's questions and behavior. He specifically pinpoints that she is feeling perturbed and experiencing a disorienting dilemma. Oliver's picture interpretation also reinforces the importance of the instinctual way of learning. Oliver explains that he is aware of his own body's movement to facilitate travelers' engagement in the transformative process:

Figure 2. Oliver selected picture



*Look at how curious these people are. They're looking. The father is in the background, writing down what he's hearing, or what he's seeing. These kids are very curious. I think the docent is obviously saying things to these kids that is making them she's making them curious. She's engaging them. And I think that's very, very significant. And I might, if this was me, what might have been different is that I might have been standing back there with them, as opposed to standing in the front.
Oliver (M), 60s, 5 years of experience as a transformative tourism educator*

In conclusion, the Transformative Learning Theory is enriched by the integration of the concept of emotional intelligence to understand transformative educators' perspectives. During the oral presentation, our team will focus on the methodological challenges, implemented solutions, the importance of establishing rapport and trust with community collaborators, and self-reflection about our data analysis approach.

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