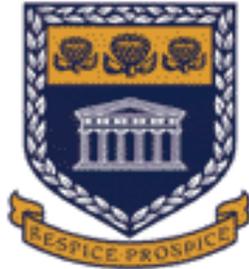


The University of the Western Cape



**The Department of Geography and
Environmental Studies**

Backpacker Tourism: An Analysis of Travel Motivation

Thesis for Masters of Arts

UNIVERSITY of the
WESTERN CAPE

By

Zinzisa Sixaba

Student Number: 2764934

Supervisor: Dr. Mark Boekstein

Co-supervisor: Prof. Daniel Tevera

Date: November 2013

DECLARATION

I **Zinzisa Sixaba** declare that this thesis entitled *Backpacker Tourism: an Analysis of Travel Motivation* is my own work, that has not been submitted before for any degree or examination in any other university, and that all the sources that I have used or quoted have been indicated and acknowledged by complete references.

Signed.....Date.....



ABSTRACT

Backpacker tourism is a niche market of tourism that has been rapidly growing, South Africa in particular has become an increasingly popular destination for backpacker tourism (Visser 2004). Academic interest in backpacker tourism research has grown in recent years, although the current literature on backpacker tourism has focused on the economic significance and impacts with little empirical research conducted on the characteristics, motivations and behaviors. Cohen (2003) stresses that future research should stop referring to backpacking as if it were a homogeneous phenomenon, and should rather focus on its diverse manifestations in terms of origins, age, gender, class, nationality and cultural backgrounds of backpackers. Since backpacker tourism is a growing market it is important for the destination to understand the specifics and capabilities of the market in order to create sustainable products. The main aim of this research is to segment the backpacker tourism market in South Africa, in order to ascertain if any significant sub-groups exist. Both qualitative and quantitative methods were utilised to collect data including a distribution of 202 questionnaire surveys to backpackers within backpacker hostels and also participant observation was employed to gain an in-depth understanding of the phenomena. Factor and cluster analysis was used to analyse the data. The following motive-based segments were identified: Self-developers/ Learners, Experience Seekers, Escapers/ Independence, Adventures/ Social Seekers. The results revealed that these segments do illustrate an increase in the heterogeneity of backpacker tourism. The reason these sub-groups of backpackers are depicted in South Africa is to address the underlying desires of backpackers in order to satisfy their needs.

Keywords: backpacker; motivation; niche market; motivation; homogeneous; heterogeneity; factor analysis; cluster analysis.

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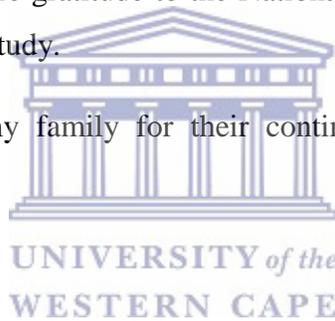


TABLE OF CONTENTS

DECLARATION.....	ii
ABSTRACT.....	iii
ACKNOWLEDGEMENTS.....	iv
TABLE OF CONTENTS.....	v
LIST OF TABLES.....	xi
LIST OF FIGURES.....	xii

CHAPTER 1: INTRODUCTION TO THE STUDY

1.1 Introduction.....	1
1.2 Problem statement.....	3
1.3 Aims and objectives.....	4
1.4 Rationale/significance of the study.....	4
1.5 Background to the study.....	5
1.5.1 Definition of a ‘backpacker’.....	5
1.5.2 Overview of the global backpacking industry.....	7
1.5.3 Backpacker tourism in South Africa.....	8
1.5.4 Developmental impacts of backpacker tourism.....	9
1.6 Structure of the Study.....	11

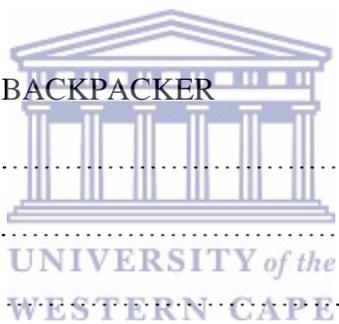
CHAPTER 2: BACKPACKING AND THE MOTIVATION TO TRAVEL

2.1 Introduction.....	13
2.2 General human motivations.....	13
2.3 Travel motivations.....	13

2.4 Travel motivations of backpackers.....	19
2.5 Themes of backpacker motivation.....	21
2.5.1 Escape.....	21
2.5.2 Searching for authenticity.....	22
2.5.3 Self-identity and self-development.....	22
2.5.4 Social interaction.....	23
2.6 Theoretical frameworks.....	24
2.6.1 Push and pull factors.....	25
2.6.2 Tourist typologies	26
2.7 Summary.....	30

CHAPTER 3: UNPACKING THE BACKPACKER

3.1 Introduction.....	31
3.2 Backpacker demographics.....	31
3.2.1 Nationality.....	31
3.2.2 Gender.....	31
3.2.3 Age.....	32
3.2.4 Education.....	33
3.2.5 Budget	33
3.3 Context of backpackers.....	34
3.3.1 Length of stay.....	34
3.3.2 Information source.....	34
3.3.3 Transportation.....	35
3.3.4 Accommodation.....	36
3.3.5 Backpacker spaces	37



3.3.6 Backpacker movements.....	38
3.3.7 Backpacking identity.....	39
3.3.8 Backpacker activities.....	40
3.3.9 Backpacker as a rite of passage.....	42
3.4 Segmentation.....	43
3.4.1 Understanding the heterogeneity of the backpacker market.....	43
3.4.2 Segmenting the backpacker market.....	45
3.5 Summary.....	46

CHAPTER 4: METHODOLOGY

4.1 Introduction.....	47
4.2 Research approach.....	47
4.2.1 Qualitative approach.....	47
4.2.2 Quantitative approach.....	48
4.3 Participants.....	48
4.4 Study area.....	49
4.5 Sampling method.....	50
4.5.1 Convenience sampling.....	50
4.5.2 Sample size.....	50
4.6 Data collection methods.....	51
4.6.1 Participant observation.....	51
4.6.2 Questionnaire survey.....	51
4.7 Data analysis.....	53
4.7.1 Qualitative data analysis.....	53
4.7.2 Quantitative data analysis.....	53



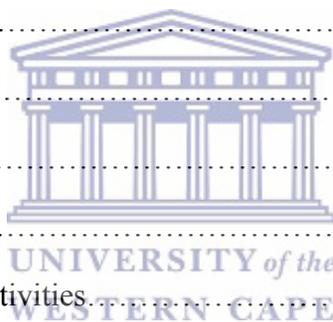
4.8 Comparison of clusters.....	55
4.9 Ethical considerations.....	56
4.10 Limitations of the study.....	56
4.11 Summary.....	57

CHAPTER 5: INTERPRETATION AND DISCUSSION

5.1 Introduction.....	58
5.2 Profile of respondent’s demographic information.....	58
5.2.1 Nationality.....	58
5.2.2 Gender.....	59
5.2.3 Age.....	60
5.2.4 Education.....	61
5.3 Trip related data.....	61
5.3.1 Visit to South Africa.....	61
5.3.2 Travel information.....	62
5.3.3 Duration of visit.....	62
5.3.4 Travel companions.....	62
5.3.5 Planning of trip.....	63
5.3.6 Modes of transport used within South Africa.....	64
5.3.7 Accommodation.....	65
5.4 Reason for travelling to South Africa.....	66
5.5 Activities.....	67
5.6 Identity.....	69
5.7 Travel experience.....	71
5.8 Institutionalisation and non-institutionalisation of backpacker tourism in S.A	72



5.8.1 Backpacker trails.....	73
5.8.2 The enclave.....	73
5.9 Motivation-based market segmentation.....	74
5.9.1 Factor analysis.....	74
5.9.2 Analysis of the motive statements.....	75
5.9.3 Identified factors.....	76
5.10 Cluster analysis.....	77
5.10.1 Interpretation of cluster analysis.....	78
5.10.2 Identified clusters.....	78
5.11 Demographic comparison of clusters.....	81
5.11.1 Nationality	81
5.11.2 Gender.....	81
5.11.3 Age.....	82
5.11.4 Education.....	82
5.12 Comparison of clusters and activities.....	83
5.13 Summary	85



CHAPTER 6: CONCLUSION AND RECOMMENDATIONS

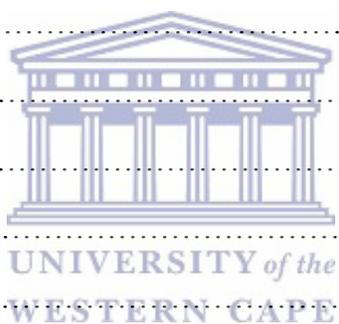
6.1 Introduction.....	86
6.2 Key findings.....	86
6.2.1 Research in backpacker tourism in SA.....	86
6.2.2 Understanding backpacker demographics.....	87
6.3.3 Trip-related information.....	88
6.3.4 Motivation-based market segmentation.....	89
6.3.5 Institutionalisation of backpacker tourism.....	91

6.4 Segments/ Typologies.....	91
6.5 Recommendations.....	92
6.6 Conclusion.....	92
REFERENCES.....	94
LIST OF INTERVIEWS.....	102
APPENDIX 1: QUESTIONNAIRE	103
APPENDIX 2: ROTATED COMPONENT MATRIX.....	110



LIST OF TABLES

Table 1: Iso-Ahola’s motivation theory.....	19
Table 2: Requirements for a sound theory of tourist motivation.....	25
Table 3: Tourism typologies.....	30
Table 4: Demographic profile of respondents.....	59
Table 5: Trip related data.....	63
Table 6: Modes of transport used.....	65
Table 7: Type of accommodation.....	65
Table 7.1: Reason for type of accommodation.....	66
Table 8: Reason for travelling.....	67
Table 9: Activities.....	68
Table 10: Defining the self.....	69
Table 11: Perception of the self.....	70
Table 12: Travel experience.....	72
Table 13: Motive statements/ variable used in factor analysis.....	75
Table 14: Eigenvalues.....	76
Table 15: The 3-5 cluster solution.....	78
Table 16: The 4 cluster solution.....	78
Table 17: Comparison of mean importance.....	79
Table 18: Comparison of clusters across demographic characteristics.....	83
Table 19: Clusters and activities comparison.....	84



LIST OF FIGURES

Figure 1: The five levels of needs in the career ladder theory.....	15
Figure 2: Route map of study area South Africa.....	49



CHAPTER 1

INTRODUCTION AND CONTEXT

1.1 Introduction

One of the ways that provides evidence on the forever increasing mobile world is the backpacker. Backpacking has emerged as a major global cultural, economic and social phenomenon that is increased by the convenience of international travel and a growing network of budget hostels and tour operators (Thyne, Davies & Nash, 2005). Backpackers are found in almost every corner of the globe, ranging from rural areas to urban centre. They carry with them not only their backpack which is the symbolic physical baggage that gives them their name, but also their different lifestyles from their places of origin (Richards & Wilson, 2004a). The word backpacker is now extensively used and well-understood as a description of young budget travellers on extended holiday (Loker-Murphy, 1996). Growing numbers of people are moving away from conventional ways of travelling and are isolating themselves from the modern-day concept of holiday by finding alternative ways to travel by adopting the life style of backpacking (Westerhausen, 2002, cited in Richards & Wilson, 2004a).

The growth of backpacker tourism has been accompanied by an increase in research. Backpacker tourism as a subject of research features a diverse range of studies that aims to unravel its internal complexities (Ateljevic & Doorne, 2004). Research interest in the motivation and experiences of backpackers has grown in recent years. This is especially the case because of the acknowledgement of their economic, social and cultural significance. In the past, there was little empirical research on backpackers because many governments often had negative or neutral attitudes to encouraging backpacker tourism (Ateljevic & Doorne, 2004). However, more recently, the trend has changed as more and more governments have started to accept the concept of backpacker tourism and want to play a major role in stimulating research concerning the backpacker market (Speed & Harrison, 2004).

There are numerous arguments and debates that concern the backpacker phenomenon. Many scholars have contributed to the theoretical conceptualisation of backpacker tourism. Ateljevic

& Doorne (2004) focus on the theoretical encounters and foundations of backpacker tourism research. They explain that the study of backpacking began when Cohen (1972) differentiated between institutionalisation and non-institutionalisation of travellers. This is where Cohen identified different tourist typologies, such as the drifter and explorer as non-institutionalised travellers. Further research has since emerged that is aimed at introducing and defining the backpacker phenomenon (Riley, 1988). Studies that mainly focus on the motivational aspects of backpackers include those by Loker-Murphy (1998) and Ateljevic & Doorne (2001). These studies revealed that backpackers have multi-motives and that their motivations are very diverse, this led to the introduction of motivation-based segmentation studies. Further arguments came about that backpacker tourism is not an alternative to mainstream tourism, but is rather a variant form of mass tourism, even though it is difficult to distinguish between backpackers and other types of tourism (O'Riley, 2006). Other research on backpackers has focused on issues of backpacker identity and how backpacker tourism is socially constructed by the tourism system (Sorensen, 2003; Richards & Wilson, 2004c; Welk, 2004; Binder, 2004). Additionally, there has also been research that focuses on the economic dimensions of backpacker tourism and its contributions and impact on the local communities (Hampton 1998, Hampton 2013). There is other research that has looked at the motivation and economic impact of the backpacker tourism in South Africa Visser & Barker 2004b; Visser 2004; Niggel & Benson, 2008; Rogerson, 2007).

Two most recent publications on backpacker tourism include the Global Nomad Collection (Richards & Wilson, 2004) and Backpacker Tourism Concepts and Profiles (Ateljevic & Hannam, 2008). Both of these books are aimed at highlighting the debates and discussions about backpacker tourism at a global level.

Richards & Wilson (2004b) set out questions to examine what individuals gain from travelling, and what impact they have on the places that they visit. This edition further looks at analysing the theoretical implications of the whole backpacker phenomenon and provides an analysis of the practical implications of backpacker tourism at the destinations on both the local communities and policy makers. It also includes discussions and some presentations of some countries that have experienced backpacker tourism, such as Australia, New Zealand and Scotland. The final conclusions from these backpacking researchers is that the context of backpacking tourism has been changing rather rapidly because of the expansion of the backpacker market and the different

styles of backpackers that are developing. Further these researchers provided implications of bridging the gap between qualitative ethnography and the quantitative market-based approaches. Moreover the publication by Ateljevic & Hannam (2008) provides an analysis of the idea of the backpacker 'enclave', arguing that the enclave is a site of production, reproduction and consumption of the backpacker. Hottola (2008) discusses the idea of backpackers being in search of control of their 'spaces', both public and meta-spaces and further provide new material and insights on the motivation of backpackers in South Africa as the push and pull factors they use as their theoretical basis (Niggel and Benson, 2008). All this research has been seen as breaking new ground on backpacker research, giving a greater background and understanding on the phenomenon.

It seems most research is conducted in areas of the world where the impact of backpacking is evident. For example Australia has the highest volume of academic research (Department of Trade and Industry, 2007). However the lack of published research on backpacking in the USA and parts of Asia can be explained by the use of different terminology by researchers. For example in North America terminology such as independent traveller or youth travel and in South America and Asia terminology such as adventure tourism or trekking is preferred (DTI, 2007). Overall it seems that backpacker tourism research tends to focus on three major aspects, firstly: market-based research which is concerned with the destination, backpacker products and segmentation of the market. Secondly the cultural aspect of backpacking that deals with issues of backpacker characteristics, personal fulfillment, identity formation, origins of backpacking, experience, or authenticity. Lastly the developmental impact which focus on the negative and positive contributions of backpacker tourism to the local community.

1.2 Problem statement

Backpackers are generally regarded as consisting of one homogeneous group, despite the fact that the interests and motivations of backpackers appear to vary considerably, ranging from self-development on the one hand, to learning about local culture on the other (O'Reilly, 2006). Cohen (2003) stresses that future research should refrain from referring to backpacking as if it were a homogeneous phenomenon, and should rather focus on its diverse manifestations. Scheyvens (2002) argues that distinct types of backpackers are emerging, some of whom are more independent and others who are more institutionalised. Given the diverse nature of the

backpacking industry it is important for the destination to understand the capabilities of this market. The problem that emerges is whether backpackers travelling in South Africa should be regarded as a homogeneous group, or whether there are any significant sub-groups that exist, with specific motivations, and do these sub-groups have the potential for specific product development?

1.3 Aims and objectives

The main aim of this research is to segment the backpacker tourism market in South Africa in order to ascertain if significant sub-groups exist in it.

Secondary objectives are:

- a) To construct a demographic profile of backpackers visiting South Africa.
- b) To explore the extent of institutionalisation and non-institutionalisation of the backpacker tourism in South Africa.
- c) To segment the backpacker market into different sub-groups according to motivation to travel.

1.4 Rationale/significance of the study

The National Government of South Africa has only recently decided to recognize backpacking as a potentially important segment of tourism. Research on backpackers (Kamilla SA Sport and Tourism Consultancy & City of Cape Town, 2009) has revealed increasing trends about the backpacker market players in Cape Town, stating that this niche market is not only growing in demand, but also growing in diversity of participants. Globally, backpacking suppliers have been changing and repositioning their products to capture new trends, such as the older and more up-market types of backpackers. This study has been drawn to the existence of a lack of consistent data and policy at local and national levels about this sector, thereby showing lack of marketing awareness of this important niche market. These challenges will need to be addressed if the backpacker market in South Africa has to grow to a level of global recognition and competitive participation.

This research can play an essential role in addressing these issues. Sub-groups of backpackers in South Africa will be highlighted in order to be able to address the underlying desires of backpackers who visit Cape Town and South Africa by trying to satisfy the needs of these travellers. Given the diverse nature of the backpacker market, it is important for the country of

destination to understand the specific issues and capacity of the market in order to create sustainable products. The establishment of backpacker sub-groups can improve target marketing in South Africa and help the country to position itself well as a country of destination that wishes to meet the diverse needs of these backpacker travellers.

1.5 Background of the study

1.5.1 Definition of a ‘backpacker’

There appears to be no single definition of a ‘backpacker’ that has been accepted by different academics or by the general tourism industry (Hampton, 2013). However, the traditional definition of backpackers relates to those who are independent and who survive with minimal expenditure during their holiday travelling (Scheyvens, 2002).

Some of the backpacker characteristics that have been relied on in creating a social definition are provided by (Pearce, 1990 cited in Ateljevic & Doorne 2004) which included the following criteria:

- A preference for low cost/budget accommodation;
- An emphasis on meeting other travellers;
- An independently organised and flexible travel schedule;
- Longer rather than very brief holidays, and
- An emphasis on informal and participatory holiday activities.

Pearce’s criteria was a departure point of the term ‘budget traveller’ (Riley 1988 refers to budget travellers as individuals who are desirous of extending their travels beyond that of a cyclical holiday hence the necessity of living on a budget. Pearce introduced the term ‘backpacker’ into the academic literature, Ateljevic & Doorne (2004). However Ateljevic & Doorne (2004) maintain that it was Pearce (1990) who introduced the term ‘backpacker’ into the academic world of literature. They note that Pearce’s (1990) analysis was mainly concerned with the motivational aspect, particularly focusing on the reasons of travelling as a form of escape from life choices back home, and therefore the whole idea of travel as a pursuit of much healthier outdoor activities. Further exploration of the motivation of backpackers is found in Loker-Murphy & Pearce (1995). The term ‘backpacker’ has continued to be used in academic research

circles despite the lack of conformity among researchers on its actual meaning. It has been difficult for scholars to agree on a precise definition of what a backpacker is. Tourism Australia defines a 'backpacker' as a traveller who spends one or more nights in backpacker accommodation, while the DTI (2007) defines a backpacker as a visitor who stays at least one night in a backpacker accommodation. Thus, the definitions seem to emphasize the time spent at a specific type of accommodation, say a night or two. Ateljevic & Doorne (2001:170) also conceptualises the backpacker phenomenon as a "wide spectrum of people whose movements are more representative of the conventional 'tourist' than a 'drifter' and whose expenditure patterns precludes them from the categorisation of budget traveller". Mohsin & Ryan (2003) challenge the perception of backpackers as 'gap year' or recently graduated students travelling to increase their knowledge of people and places.

Backpackers have been described as individuals who are keen on trying out new adventures by deliberately travelling without any set itinerary, without any specific destination or even without a well-defined purpose or meaning. They are known as individuals who travel to reach out to different geographical places that ordinary tourists would not reach at all in their search for more authentic socio-cultural experiences off the beaten track (Cohen, 2003). However, Moaz (2007) defines the term 'backpackers' as self-organised pleasure tourists on a prolonged multiple-destination journey with flexible itinerary. They are often keen to experience local lifestyles and are motivated by meeting new people. Thus, most of the backpacker activity tends to involve elements to do with nature, culture and adventure. Backpackers are also known for their bargaining and budgeting character, their longer duration of stay to experience contact with different people. The term 'backpacker', then, appears to have become associated with travelling style that highlights freedom and mobility.

During the 1970's there were negative perceptions associated with backpackers in South Africa. Backpacking was associated with 'drifters', 'hippies' and 'drop-outs' giving backpacking a poverty-related image associated 'drug use' and 'rebellion' (DTI, 2007). Cohen (2004) describes the hedonistic culture that is mostly associated with backpacking and asserts that backpackers are often condemned for their appearance and conduct, particularly their sexual freedom. However, an improved and quite different image of the backpacker seems to have

emerged in modern times since the 1980's which creates a new niche market of backpacker tourism (DTI, 2007).

1.5.2 Overview of the global backpacking industry

Backpacker tourism is a significant niche now in tourism marketing and it is rapidly expanding all over the world (Niggel & Benson, 2006). Research has focused on destinations where the impact of backpacking is most evident. This includes destinations such as Australia, New Zealand and South-East Asia and different African countries (Richards & Wilson, 2004b; Niggel & Benson, 2008). Backpackers are now a valued niche of the Australian economy to the extent that government has started implementing a proactive approach towards the backpacking industry (DTI, 2007).

The growth of the backpacker industry of these two countries has generated a lot of interest and attracted research publications and economic frameworks for understanding and developing the backpacker sector. For example, the publication of the National Backpacker Tourism Strategy in Australia specifically identified key issues and developed key strategies in the areas of marketing, accommodation, transport, research, industry coordination, employment and training (Slaughter, 2004). Several studies have been conducted in New Zealand with a particular focus on the demographics and travel motivation of the backpacker which sought to address the underlying question of who the backpackers really are and why they backpack (Newlands, 2004). There are a few governments in the world that offer direct means of support for the backpacker industry. South-East Asia is known as 'the cradle of Third World backpacking', 'the cradle of Lonely Planet guided backpackers' and 'the birthplace of mass backpacking' (Spreitzhofer, 2002 cited in DTI, 2007). There has been tremendous expansion of backpacking across the countries of South-East Asia. Countries such as Thailand, Singapore, Malaysia and Indonesia were the core concentrations for the emergence of 'backpacker trails, leading to the establishment of 'backpacker enclaves' (DTI, 2007). However, countries such as Cambodia, Laos and Vietnam were dissociated from the early rise of backpacker tourism until the late 1980's, when these countries finally opened up to backpacker tourism. In addition, new international destinations have been emerging which are seeking to attract backpackers. These destinations include Taiwan, Turkey, Mexico and Mozambique (DTI, 2007).

1.5.3 Backpacker tourism in South Africa

South Africa is one of the countries that has a growing international backpacking and youth travel market estimated at approximately 90 000 in 2006 (DTI, 2007). In the case of South Africa, backpacker tourism is a comparatively recent phenomenon compared to the global backpacking industry and it is striving to catch up with the mature destinations such as Australia and New Zealand. The DTI (2007) argues that South Africa can learn a lot from the Australian policy experience, and can use Australian policies as a benchmark to enhance the competitiveness of the backpacker industry in South Africa (DTI, 2007). Since South Africa became a democracy in 1994 it has become a popular backpacking destination and has developed a well-established infrastructure for backpacker tourists (Niggel & Benson, 2008). South Africa has been ranked the 16th most popular destination in terms of youth and backpacker demand by Lonely Planet (2006, cited in Kamilla SA Sport and Tourism Consultancy & City of Cape Town, 2009). The South African backpacker industry has a growth rate of 21% per annum and the average backpacker spends 6-12 weeks in southern Africa (Niggel & Benson, 2008). The largest groups of backpackers coming to South Africa are from the United Kingdom, followed by Germans, Dutch, Scandinavians and Spanish, then Australians and New Zealanders. Their average age is between 25 and 28 (Niggel & Benson, 2008). Visser (2004) confirms that there is little published research on backpacker tourism in South Africa and that the available studies conducted at local level in cities such as Cape Town have been descriptive rather than theoretically based research. At provincial level, the Western Cape is the most popular backpacker destination in South Africa, with 93% of backpackers visiting the province, followed by the Eastern Cape (Visser & Barker, 2004).

South Africa exists in a highly competitive market of international backpackers and this industry has been recognised by the government as an important niche market for the South African tourism economy. However, at local level, Cape Town is the most popular destination with backpackers participating in a variety of different activities. Cape Town is seen as one of the growing world's 'hot spots' by international backpackers and it has been discovered that on average 75% backpackers to South Africa stay at least one night in Cape Town (Visser, 2004).

1.5.4 Developmental impact of backpacker tourism

Tourism is often perceived as an engine of economic growth although the focus is frequently on mass tourism, ignoring backpacker tourism. Backpacker tourism is often viewed parallel to conventional mass tourism in terms of the foreign exchange leakage, earnings and issues of local ownership and control (Hampton, 1998). South Africa has witnessed tremendous growth in tourism over the past decade, although much of it is mass tourism. A number of researchers have clearly examined ways in which backpackers contribute to the local development in the Third World context. However, according to Scheyvens (2002), there is a negative attitude in Third World countries by their governments about the backpacking industry who believe that it brings in minimal revenue to the country of destination. This perception has been challenged by research in Australia and New Zealand where it has been found that due to the longer length of stay, backpackers spend a lot more money than any other tourist type, since they stay longer than the average tourist (Scheyvens, 2002). Additionally, backpackers spread their spending over a wider geographical area, bringing economic benefits to rural and economically depressed regions, where the conventional mass tourist rarely ventures to (Scheyvens, 2002). An example is noted in the study by Visser (2004) of the Australian case where it was found that most backpackers had visited at least three states as compared to the mass tourists who generally explore only Sydney and its surroundings.

Backpackers generally purchase locally produced goods and services and also their flexible travel schedules mostly use local transport when travelling. Backpackers also require minimal structures and facilities as they are seldom concerned with things of comfort such as air conditioned rooms or other amenities of comfort. Visser (2004) provides examples of the minimal importance of the infrastructure requirements for backpackers, noting that local families would rent out rooms to backpackers. Visser (2004) also found out that women are often excluded in formal economic activities in tourism, but he notes that they are involved in selling handicrafts, operating food stalls or working as beach vendors. Visser (2004) gives a number of reasons as to why government should start focusing seriously on backpacker tourism. These include:

- A more meaningful encounter between backpackers and the local communities will lead to minimal social and cultural disruptions.

- In terms of the ownership and control patterns of whatever business engagement, Visser (2004) argues that backpacker tourism has shifted towards locally owned business enterprises rather than foreign owned ones, and hence the benefits will be spread among the local communities where backpackers visit and it will increase the economic participation of the local communities through the local multiplier effect. Hampton (1998) also notes that backpacker tourism can play a significant role on the local economic multiplier effect by drawing on local skills and resources.
- Backpacker tourism can empower local communities by encouraging the community to participate in tourism planning and implementation, thereby increasing the local communities' participation in tourism developmental activities (Visser, 2004).
- Backpacker tourism stresses the sustainability of cultural and environmental economic activities, which in a sense also encourages respect for local culture, offering entrepreneurial prospects for local communities through 'selling' or marketing of the local culture. Conversely, Hampton (1998) argues that the interest of backpackers in meeting local people and learning more about local culture can lead to the revitalisation of local culture and traditions as a supporting industry.



A number of issues surface with regards to the backpacker tourism's potential contribution to the local economic development. Visser (2004) argues that apart from the opportunities created for black employees in South Africa, the main beneficiaries of the whole expansion of backpacker tourism industry are mostly whites who have the real chance to own hostel and lodges, operate organised trips or own the retail sector. Therefore, backpacker tourism may not be all-inclusive in terms of economic benefits, demonstrating the unfortunate limitations of backpacker tourism in terms of transformational economic benefits for the majority of blacks, particularly those living in the remote urban areas and deep rural areas. As noted by Visser (2004), due to spatial segregation, the current distribution of backpacker facilities does not stimulate economic development, but rather, enforces an already uneven urban tourism space of the economy. For instance, in South Africa, the location of most backpacker hostels are clustered in intra-urban areas such as Cape Town's Long Street while very few backpacker hostels are found in the township areas. The poor townships still remain ignored, with no support to engage in viable tourism activities.

Backpacker facilities in South Africa lack diversity in terms of physical structure, when compared to the backpacker hubs of Thailand or Indonesia. For instance, such hostel structures often require less amounts of capital, and the materials to construct them are often inexpensive and do not have to make use of Western-oriented ideas of housing design. However, Visser (2004) argues that in South Africa, the backpacker hostel sector seems to be a replica of the accommodation found in countries such as Australia and New Zealand, with westernised building designs rather than using local designs and materials. Visser (2004) further argues that since little research has been done in South Africa with regards to backpacker tourism, the resultant lack of knowledge of the needs of that tourism industry or system makes the country uncompetitive about the backpacker niche in general. Moreover, he realises that education of the local community is crucial for the successful utilisation of the backpacker tourism industry for local economic development in South Africa, particularly in regions such as the Eastern Cape, KwaZulu Natal and Mpumalanga, where generally educational levels are still very poor for most of the ordinary people.

1.6 Structure of this study

Chapter 1: Introduction and background of the study

This chapter introduces the general background of backpacker tourism. It also includes a discussion on the developmental impact of backpacker tourism in the country. The chapter contextualises the research problem, research objectives and significance of the study.

Chapter 2: Backpacking and the motivation to travel

The first part of this chapter focuses on the general human motivation, general travel motivation and backpacker motivation. With regards to backpacker motivation, various themes of backpacker motivation are identified. These included motivation to escape, search for authentic experiences and self-identity and self-development which is the desire to construct a new or temporary identity through travel. The second part of this chapter highlights some of the broad-based theories of tourist motivations that are deemed applicable in the tourism sector. These include Maslow's hierarchy of needs which is a model that is central to tourism literature. Others include Pearce's career ladder, Push and Pull factors and Tourism Typologies.

Chapter 3: Unpacking the backpacker

This chapter mainly looks at of backpacker literature focusing on backpacker demographics, motivations, identity, activities, movements and spaces. Additionally, this chapter will also review the diversity of the backpacking phenomena by exploring the institutionalisation and non-institutionalisation of backpacking. The main discussion that follows throughout the chapter is the argument made to examine whether backpacker motivation is similar in different contextual situations. The chapter also unpacks the heterogeneity of the backpacker market in order to recognise the sub-segments that exist among backpacker.

Chapter 4: Methodology

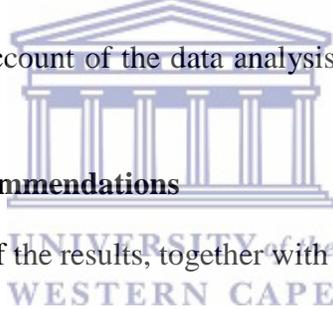
The chapter describes the research design and the methodology used in this research and the limitations of the study.

Chapter 5: Discussion and interpretation of results:

This chapter provides a detailed account of the data analysis and of the empirical field findings and discussion of findings.

Chapter 6: Conclusions and recommendations

This chapter includes a summary of the results, together with conclusions and recommendations.



CHAPTER 2

BACKPACKING AND THE MOTIVATION TO TRAVEL

2.1 Introduction

This chapter presents the first part of the literature review which focuses on the theoretical frameworks that are to be applied in this study. However, motivation is used as the theoretical basis of this study because it is one of the most appropriate frameworks of segmenting backpackers on the basis of their similarities and differences. The chapter first introduces general human motivation and then goes on to explain general travel motivation before outlining specific themes in relation to backpacker motivation. This chapter also aims to outline other theories that are to be used as part of the conceptual guiding force for this study including the push and pull factors, and tourist typologies.

2.2 General human motivations

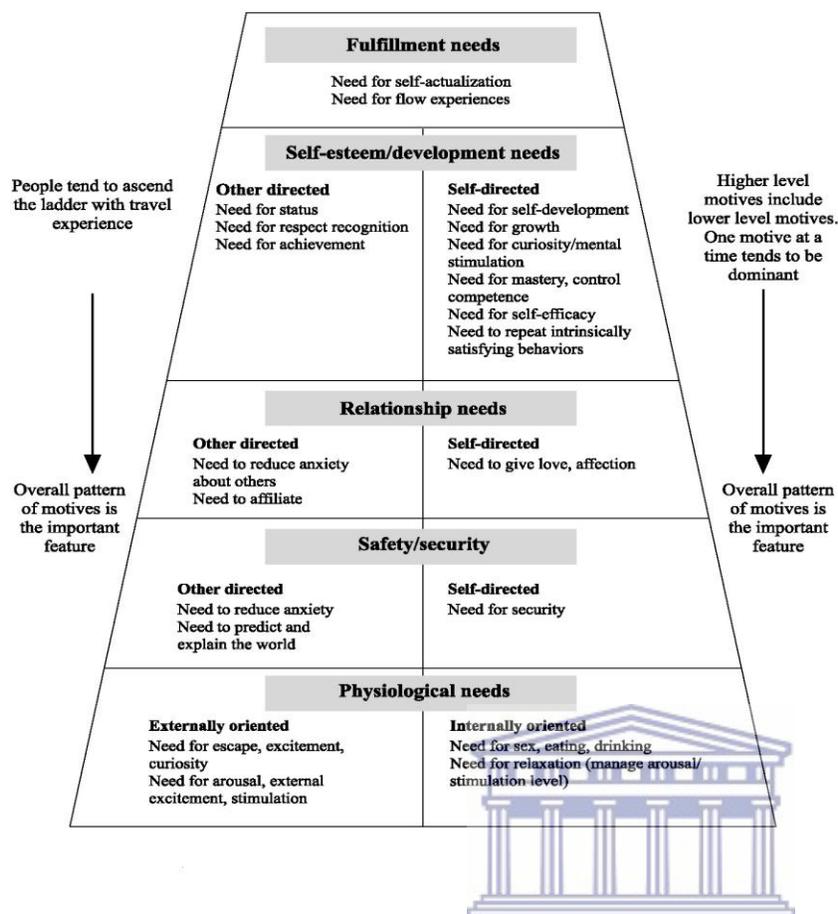
Different psychological and philosophical literature has since tried to define and articulate the concept of human motivation. Weiner (1992:1) states that motivation is ‘why human organisms think and behave the way they do?’ The motivation concept has to do with the ‘why’ question, why people choose to do the things they do and why individuals act in a particular way in a particular situation. McClelland (1976:87) assert that ‘the most common assumption in motivational theory is that motives are deficit tensional states which energising organisms feel until relief is obtained or an equilibrium is restored’. Therefore, the motivation activity brings with it harmony to the individual when the motive is fulfilled.

2.3 Travel motivations

Geen, Beatty, & Arkin, (1984) comments on the terminology around the study of motivation, pointing out that these terms include needs, drive, incentive, expectancy and the arousal effect. However, these needs and expectations cannot be seen or touched, but rather intrinsically felt and by way of reasoning. In other words, motivation is abstract and intangible. Furthermore, Maslow (1954) expresses that the field of motivation must ultimately be in the study of human goals, desires or needs. The literature in tourism studies has demonstrated that Maslow’s

'hierarchy of needs' provides an understanding of the tourist in order to satisfy their needs. Maslow's 'hierarchical theory of needs' implies a sense of personal growth. Maslow (1954) organizes and categorizes all human needs according to individual people striving to achieve these basic needs that are placed in some kind of a hierarchy. At the bottom of the hierarchy are the physiological or biological needs which are basically the essential and basic needs to sustain life, followed by the need for safety and security which is basically protection from physical and emotional harm or damage, then there is the need for love and belonging need which involves interactions and relationships with other people, then there is the need for self-esteem which basically is wanting to be accepted by society and other people in order to gain respect or confidence. On top of the ladder is self-actualisation which is fundamentally the need for an individual to reach her or his full potential and fulfilling their life-long desires or achieving their goals (Maslow 1954). Another model worth discussing which originates from the Maslow's hierarchal theory of needs is Pearce's career ladder theory, which argues that each person has a 'travel career' just as they have a 'work career' (Mill & Morrison, 1998).

The main aim of Pearce's career ladder (Figure 1) is to emphasise the fact that people's travel decisions and travel motivations are not static, but rather dynamic, because they change over a person's life time based on their travel experiences (Mill & Morrison, 1998). This ladder helps to identify the diverse needs that backpackers have and questions the idea that backpackers are a homogenous group. Loker-Murphy (1996) talks of modernised typologies of travellers that are grouped according to three motivational profiles: the 'self-developers'; the 'new experience seekers' and the 'travel generalists'. The 'self-developers' are interested in personal growth, the 'experience seekers' are interested in seeing new places and not so much concerned with inner selves and the 'travel generalists' may just enjoy travelling to new places without any dominant set of motives.



Source: Gonzalez & Bello (2002) adapted from Pearce (1991)

Figure 1: The five levels of needs in the career ladder theory.

Loker-Murphy (1996) believes that Pearce’s model provides a useful framework to measure and evaluate the travel career levels of backpackers. The travel ladder theory also considers the fact that people have different life-cycles in their travel behavior which will cause them to move up and down the ladder at various stages of life according to their differentiated needs and interests. Their motives and needs change over time, in different geographical locations and among different people.

Tourist motivation can also be seen as a hybrid concept stemming from the orientations of psychology and sociology although its context in tourism studies might not be precisely equivalent to the position employed in the psychology and sociology orientation (Pearce, 1993). Tourism motivation theories have a role of explaining a wide range of phenomena in tourism, including how tourists choose a place to go for holidays, how tourists’ satisfaction can be

attained and how to bring about a marketing strategy for a targeted tourist region so that it appeals to the potential tourists (Pearce, 1993). These roles all bring awareness to the importance of psychological factors and processes in tourism and they use the motivational theory in order to understand how to better tourist choices, preferences and requirements (Pearce, 1993). Furthermore, the motivational theory is accompanied by terms such as attitudes, behavioral intentions, values, preferences, needs and goals. Therefore, Pearce (1993) sees tourist motivation as an integrated network of biological and cultural forces which give direction to travel choices and experiences.

Weiner (1992) explains that motivational analysis is useful because it observes and measures what the individual is doing, how long it takes before the individual initiates the activity when given the opportunity, the amount of hard work that went into that activity, how the individual influences the activity, the length of time he spends with the activity and the individual feeling before, during and after the activity and reaction of others after the activity. The importance of motivation in tourism is that it acts as a provocation that gives rise to the events and situations involved in travel and tourism. Motivation, in a way, gives answers and understanding to the many questions of 'why's' specific travel choices and travel behavior is undertaken (Parrinello, 1993). Studies in travel motivation have shown that holiday taking can be an understandable form of behavior when the whole motive of doing it is taken into account (Ryan, 1997). The established travel motivation studies include consumer motivation, decision making processes, product satisfaction, overall acceptability of holiday experiences, pleasure in the destination environment, interactions with the local community and cultural enrichments (Goeldner, Ritchie, & McIntosh, 2005). These concepts illustrate how tourists can be analysed in terms of the activities they participate in, their travelling experiences and how they see a particular destination, whether it satisfies their needs or whether they reach contentment with regards to their travel motives.

It has been mentioned earlier on that motivation studies suggest answers and give basic understanding as to why people choose to travel and why they choose a particular destination when travelling. Goeldner *et al* (2005) further explains that researchers need to ask why particular groups of people choose a particular holiday experience. Goeldner *et al* (2005) further states that this question is the conceptual basis of comparing different groups of travellers and

the type of experiences they seek within or amongst themselves. It can be argued that not all travellers are motivated by the same thing as each individual has their own motivational forces. Not all tourists have the same motives of wanting to travel to Africa, for instance.

Each individual tourist seeks to express himself/herself in his/her own way and each and every person seeks to gain a different experience or benefit through travel. Ryan (1997) states that different tourists have different abilities of become aware of what is and what is not, what they like and what they do not like. It eventually becomes a matter of holding different attitudes towards tourism products and creating varied responses to the same or different tourism products. It is therefore hardly possible that these tourist travellers can form one homogenous entity with the same established needs and interests.

Every tourist is different and so are the factors that motivate them. Swarbrooke & Horner (1999) identify the main factors that determine tourist motivation:

1. Personality:

- Sociable and companionable or loners and independents.
- Adventurous or cautious
- Confident or timid

2. Lifestyle:

- Concerned with the purchasing decision context. For example, there are tourists who are concerned with being fashionable whilst others are preoccupied with their health or religion.

3. Past Experience:

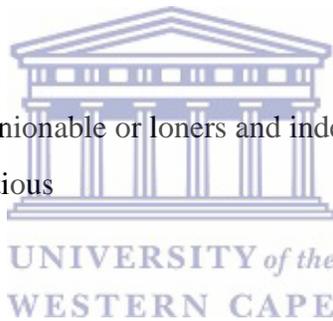
- Tourists choose their own particular type of holiday based on positive or negative past experiences.

4. Past Life:

- Factors such as nostalgia may result in an individual taking a holiday to a particular sentimental place.

5. Perception:

- Motivated to find out their own strength and weaknesses in relating to their own skills and how they perceive themselves in the world.



6. Image:

- People travel to gain a certain image where some gain the image of being elite or sophisticated through travel.

Additionally people do not always express their true motivations because they may be worried about what others will think of them and also the fear that their motivations may be construed as unacceptable by others. Therefore motivations can also be recognised as conscious or unconscious or sub-conscious when one cannot really express their true motivations (Swarbrooke & Horner, 1999)

Furthermore, it must be taken into account that motivations change over time for each individual in relation to changes in their personal situations. Swarbrooke & Horner (1999) also comment that a tourist may have multiple motivations and that it is unlikely that a tourist is only influenced by one motivational factor as it is possible that a tourist may be affected by a number of motivational factors at the same time. Pearce (1993) believes that tourists have limited motives and are likely to change their motives from one stage to another over a period of time. Furthermore, Lubbe (2003) states that motives and needs change over time, place and social company. For example, a student seeking an adrenaline packed holiday in comparison to a business person seeking a relaxed and restful holiday. In this case therefore, the holiday a tourist chooses at any one time may be markedly different to the holiday they may choose in another time in the future. The limiting factors that Lubbe (2003) mentions include money, time, family life stage and health care needs. These limiting factors also change over time (Lubbe, 2003). Pearce (1993) discovered that additional concerns that the motivational theory must explain are the dynamic and flexible considerations in order to accommodate individual changes throughout their life span and also to consider the effects of wide ranging cultural forces acting on tourist motivation as a choice. Even if individuals change their travel preferences as they move through their family career and life cycle, motivational theory should be able to model these changes in some way. Conversely, Pearce (1993) moves away from the idea that motivation theory must be a fixed approach but must rather maintain an integrative approach. Kozak (2002) notes that researchers like Cohen (1972), Plog (1974) and Dann (1977) have recognised the heterogeneity in tourist motivations. Moreover, Yoon & Uysal (2005) also revised the work of Iso-Ahola

(1982) and that depicted that tourism motivations are basically classified into two parts which are seeking and avoidance:

Table 1: Iso-Ahola’s motivation theory

Iso-Ahola’s motivation theory	Description
Personal escape	<ul style="list-style-type: none"> • Get away from their normal everyday environment • Experience a slower pace of life • Travelling to overcome stress
Interpersonal escape	<ul style="list-style-type: none"> • Taking a holiday in order to avoid people who put a lot of strain on you around your normal environment
Interpersonal seeking	<ul style="list-style-type: none"> • Meeting new people that have similar interests to your interests
Personal seeking	<ul style="list-style-type: none"> • Travelling in order to find themselves • Experiencing new things

Adapted from Snepenger, King, Marshall, & Uysal (2006:143)

The findings from the study by Snepenger *et al* (2006) show that tourism experiences are more likely to be driven by personal escape and personal seeking motivations. Therefore, promotional efforts should focus on tourism experiences that offer all four aspects of motivation, which are personal escape, interpersonal escape, personal seeking and interpersonal seeking as these should be primary motivating factors when marketing tourism experiences in order to fulfill tourist motivation (Snepenger *et al.*, 2006). Yoon & Uysal (2005) revised the work of MacCannell (1977) which asserts that from an anthropological point of view, tourists are motivated to escape their daily lives and duties by seeking authentic and real experiences.

2.4 Travel motivations of backpackers

Backpacker motivation has proved to be a complex that consists of so many debates and arguments. One of the most intriguing arguments made is whether backpacker motivations are the same to all backpackers or are different. Loker-Murphy (1996) contributes to the argument by asking if ‘all backpackers are motivated to travel by similar reasons? If not, how do their motives differ and do they lead to different desires and preferences?’ (Loker-Murphy, 1996:25).

Cohen (1972) cited in Uriely, Yonay, & Simchai (2002) identified multi-motivations pointing out that different people are motivated by different things in different social settings, and Pearce (1990), cited in Ooi & Laing (2010), notes that backpacker motivations are diverse and

multifaceted. Additionally, Pearce (1990) depicted the implication of looking at tourist motivation as a multi-motives rather than a single-trait concept (Pearce 1988 cited in Loker-Murphy, 1996). Loker-Murphy (1996) depicts evidence that backpackers are not only different from other tourists with regards to motivation, but they also differ from each other. For example, they may all be travelling on a low budget, but they will differ in terms of travel patterns. A study conducted in Israel by Uriely *et al* (2002) illustrates that some backpackers view their period of travel as a period of recreation, whilst others view it as a way of seeking new experiences, a means for self-exploration and for attaining worldly knowledge. Uriely *et al* (2002) also state that these motivations may change over time.

Moreover Uriely *et al* (2002) analyses backpacker motivations further by differentiating between the form and type of attributes of tourism. The form attribute refers to the visible and institutional arrangements and practices which include the destination, length of stay, the flexibility of their attractions, transport and accommodation, while the type attribute is referred to as the intangible and psychological attributes which include tourists' attitudes, motivation to travel and the meaning assigned to each of their travel experiences. Ooi & Laing (2010) also reflect on the diverse and multi-faceted motivations of backpackers, and they emphasise the hybrid nature of tourism motivations. Their study also reflects on the overlap between volunteer and backpacker motivations. The dominant theme in backpacker motivation that they reflect on is based on the idea that travel is a form of escape, whereby backpackers seek to break away from the dullness and monotony of everyday life, jobs, careers, decisions and responsibilities. They travel in the hope that the foreign country that they are travelling to will give them a sense of freedom, independence and new experiences. Ooi & Laing (2010) depict that the motivation to travel in foreign countries to encounter the 'unknown' is perceived as a vehicle leading to self-discovery and the quest for personal growth, through exposure to new challenging situations as they interact with foreign culture and local people. This plays a similar role to the term 'rite of passage', and O'Riley (2006) argues that the backpacking rite of passage is associated with ideals of freedom, personal development and self-fulfillment. The theory of backpacking as rite of passage is associated with the exploration of one's self and is basically seen as a transition to adulthood and as a period of independence before taking the role and responsibility of adulthood. This revisits the idea that backpackers are seen as gap year students who take a break after

studies and engage in travel experiences to gain new knowledge about the world and to seek their personal self through travel.

2.5 Themes of backpacker motivation

The purpose of this section is to draw together on the main themes of backpacker motivation. The basic motivators for travel among backpackers include the need to escape, the search for authentic experiences and the need to develop themselves and social interaction.

2.5.1 Escape

The need to escape socio-economic circumstances has long been one of the main motivators for most people to undertake holiday trips. Ateljevic & Doorne (2001) point out that most travellers are actually motivated by feelings of being dissatisfied with life in their home areas and the pressure of a routine life. Therefore, in tourism, travel has become a form of escape from many things together with the possibility of experiencing personal growth. Individuals commonly feel the need to escape from boring relationships, social expectations or responsibility as well as their daily jobs. The increase in globalisation and dissatisfaction with the Western way of life has been touted as one of the encouragements for people to travel to other, particularly Eastern countries, in order for them to experience a feeling of relaxation. Ateljevic & Doorne (2001) further state that people escape from many things through travel as a form of buying time to stop and introspect. Travel is therefore seen as a process of personal transformation and an opportunity to take a break from whatever makes life hectic, with the hope for a change of lifestyle once they have returned to their home countries.

Moreover, Riley (1988) also posits that budget travellers are escaping from the dullness and the monotony of their daily routine, from their daily jobs, from making decisions about their careers and to postpone marriage and romantic relationships. Riley (1988) explains that these individuals are at the juncture of life where they may want to seriously reflect on it, hence they travel to allow themselves to think about what they want to do with their lives so that when they return home they are able to make some positive decisions and changes about the important things in their life. Moaz (2007) cites Israeli backpackers' attempts to escape what they view as a materialistic, stressed and harsh society, and seek to find refuge in what might seem to be an authentic, pure, relaxed and primordial life experience destination.

2.5.2 Searching for authenticity

Cohen (2010) says that the commercialisation of tourist escape routes is central to the concept of authenticity. He mentions that this concept has been used to answer what the individual seeks through tourism and leisure experiences. McClelland (1973) writes that modern tourists are mainly motivated to seek authentic experiences and seek pure, original and untouched places in contrast to the industrialised and mechanised worlds that they have lived in. However, one may argue that authenticity is actually constructed by the tourism system. Backpackers may be seen as travellers who incorporate authenticity into their travel experiences. Noy (2004) views backpackers as individuals who seek ‘untouched’ and ‘unspoiled’ places which are mostly rural locations. Noy (2004) further analyses the terminology used by backpackers when narrating their stories and describing their experiences using terms that include ‘real’, ‘genuine’, ‘pure’, ‘original’, ‘primitive’, ‘wild’, and ‘untouched’. Backpackers are motivated to search for authentic experiences that will give them some sense of reward of achievement.

However, MacCannell (1973) identifies a problem of ‘fake consciousness’ with regards to social establishments of tourism, finding that these establishments are specially designed for tourism consumption and are made to support tourists’ beliefs of authentic experiences with their travel. MacCannell (1973) suggests that social reality is constructed, and tourists are motivated to see life as it really is. He further argues that they even immerse themselves with the ‘other’, although they are sometimes criticised for often failing to accomplish this desire. However, Binder (2004) argues that experiencing the ‘otherness’ is considered important for the backpacker because they see the ‘other’ as an opportunity to question and confirm things. One can argue that the interaction between the backpacker and the ‘other’ is commoditised by the tourism industry and in this case the ‘other’ is seen as a product of tourism rather than a real life experience. Their acts might just be stage-managed for the backpacker to consume. In this case, the motivation of searching for authentic experiences can be questioned.

2.5.3 Self-identity and self-development

Research has identified one of the key motivation for backpackers as the desire to construct a new or temporary identity through travel, hoping to become more courageous, relaxed and independent (Cohen, 2004; Elsrud 2001 cited in Moaz, 2007). Self-development and self-

identity are therefore among the most dominant themes in backpacker motivational literature. As Desforges (2000) explains, self-identity in tourism provides a way of addressing the questions about motivation, destination choice and the politics of tourism. He says tourism provides an impetus to modify identities of the travellers to one which is constructed (Desforges, 2000). He views Third World destinations as a construct of middle class identities whereby these destinations are imagined and encountered as places of individual achievements, self-development and strengthening of character, particularly among Western youth travellers. For Desforges (2000), self-identity is a useful concept for understanding the geographies of tourism consumption.

Desforges' (2000) sees the notion of 'the self' on an individualistic scale that is concerned with the concept of 'what kind of person am I?' He also examines the work of MacCannell (1982) cited in Desforges' (2000) and believes that a key feature in tourism consumption is that it involves a search for authentic experiences which tourists will use to develop self-consciousness about different places in the world. Desforges (2000) denotes that tourism is all about the 'lost individual' trying to discover a sense of the 'self' and dealing with the sense of 'being lost' in one's world as one becomes fragmented through urbanisation or daily jobs. Giddens (1991) cited in Desforges, (2000) therefore sees tourism as a sense of self-reward, a process of self-actualisation and self-realisation or an understanding of what it means to live life to the fullest.

Noy (2004) has noted how backpackers continuously describe radical changes in their lives after their trips. However, such changes can only be positive if they play a significant role in the personal development and realization of a sense of maturity by the people involved. According to Noy (2004), backpacking trips are concerned with the 'self' and their ability to transform people's identities. This transformational process can be beneficial to backpackers because it results in them having a sense of successful enlightenment through the trip. Binder (2004) also depicts how backpackers become 'open-minded' through travel experiences, to the extent that some individual backpackers use it as a medium for raising their self-esteem and to differentiate themselves from other tourists and non-travellers back at home.

2.5.4 Social interaction

Social interaction is a key motivator for most backpackers, as they are individuals who are always interested in forming acquaintances, particularly meeting local people and other

backpackers. As argued by Richards & Wilson (2004d), backpackers are motivated by the desire to meet fellow travellers. Richards & Wilson (2004d) add that backpackers get along well with many other travellers who simultaneously become an audience for their travel narratives. The social interaction among backpackers and the host community can somehow aid the process of self-development and make backpackers more self-confident. Murphy (2001) has looked at the nature of social interactions of backpackers and says that there has been no research on understanding the social networks which generate word-of-mouth promotions that develop among backpackers through grapevine or network communication. Murphy (2001) recognises the fact that hostels are the most common accommodation settings in which social interaction occurs among backpackers. However, Murphy (2001) discovered that the social aspects and opportunities to meet people are rated second in terms of importance. This contradicts the study by Loker-Murphy and Pearce (1995), whose findings show that meeting local people is the second most important motive for backpackers whereas mixing with fellow travellers is even less important.

2.6 Theoretical frameworks

Theories and models in tourism research are vital because they give us an understanding of how tourism systems work and they give us a better understanding on tourism perspectives in order to set out logical directions and predictions about the industry as will be used in the study. Pearce (1990) cited in Goeldner *et al.*, (2005) has highlighted seven elements that are essential for a good theory for tourist motivation (Goeldner *et al.*, 2005). These are illustrated in Table 2.

Table 2: Requirements of a sound theory of tourist motivation

Element	Explanation
The role of the theory	It must be able to integrate tourist needs and also recognise the needs as setting out a new orientation for the future
The ownership and appeal of the theory	The theory must appeal to the experts and researchers and must be useful in the tourism industry and credible to marketers and consumers
Ease of communication	It must be easy to explain to the potential users and be universal in its application rather than specific
Ability to measure travel motivation	It must be amenable to empirical research and the ideas must be translated into questions and assessed
Multimotive vs. single-trait approach	The view that travellers may seek to satisfy a number of needs at once. Theory must be able to model the patterns of other travellers' needs and not just only consider one need
Dynamic vs. snapshot approach	The theory must be able to recognise that society and the individual change over time and the changes must be considered and modeled
Roles of extrinsic and intrinsic motivation	This entails the fact that individuals may be motivated by external factors (extrinsic) for example what others think and also may be motivated by their goals and desires (intrinsic)

Adapted from Goeldner *et al.*, (2005:261)



2.6.1 Push and pull factors

Travel motivations can also be described using the push and pull factor theory. Lubbe (2003) states that push and pull factors are used in tourism to market the destination. Furthermore, in tourism literature, motivation can be classified in two forces which show that people travel because they are pushed and pulled by some forces (Dann, 1977 cited in Yoon & Uysal 2005). Additionally, Crompton (1992) cited in Kozak (2002) states that both the push and pull factors are important in the tourism industry because they shape the motivation of the tourist and can influence the choice of destination. Both push and pull factors stand on a continuum in a sense that the pull factors have the tangible attributes of the destination at one end and the push factors have intangible attributes on the other end. Tourism literature therefore stresses the significance of these push and pull factors in influencing tourist motivation and the decision making process of a particular traveler to go to a particular destination (Crompton, 1979 cited in Kozak, 2002).

Push factors are seen as the motivation factors that establish the need to travel by tourists, while the pull factors are known to be the ‘forces’ that entice a tourist to a particular destination (Lubbe, 2003). This ‘force’ is the reason why the tourist decides to take up a holiday at a particular destination. The push factor example made by Lubbe (2003) includes the need to escape, the need for status or the need to reduce anxiety.

Pull factors are therefore the factors at a particular destination that establish the wants or the motivation (push factors) that will need to be fulfilled (Lubbe, 2003). This is basically the main attraction that draws the tourist to that particular destination and what the destination has to offer to the tourist in terms of attractions. Lubbe identifies primary, secondary and tertiary pull factors. The primary pull factors mainly consist of things like the history of the people, scenery, climate, wildlife, historic sites and local culture. The secondary pull factors mainly focus on the services that are provided for the tourist and they include of accommodation, catering, personal attention and services, entertainment value, the accessibility for the tourist, the political stability of the destination or the trends and popularity of destinations in tourism. The tertiary pull factors include the ways in which the destination is marketed and also the costs of the trip to that particular destination (Lubbe, 2003).

A study by Niggel & Benson (2008) illustrates the push and pulls motivation of backpackers visiting South Africa. To them the main push factors of backpackers include discovering new places, broadening knowledge about the world, escaping from dullness of their daily routine and to have a good time with friends. The least important include improving their status, postponing current commitments, searching for a different kind of employment and to find new social and cultural partners. The main pull factors of backpackers, as depicted by Niggel & Benson (2008), include experiencing adventure, cultural and wildlife attractions, getting to know about other people’s cultures, the facilities for backpackers in South Africa, the climate and friendly people. The least important pull factors include going on a safari, getting value for money, low value of the rand, the price of backpacker accommodation in South Africa and reasonable car hire rates

2.6.2 Tourist typologies

The main aim of this proposed study is to investigate whether backpackers in South Africa can be grouped or classified as homogenous sub-groups. This will be done by drawing on the theory

of tourism typologies in order to understand backpackers' motivation to travel. The reason for looking at typologies of backpackers is to create an improved target market that can be satisfied by the service they receive from the service providers. It is meant to find effective market segmentation in order to meet the diverse needs and interests of backpackers visiting South Africa as a destination. This helps to gain better understanding of the sub-divisions of backpackers as a heterogeneous or homogeneous group. It seems as if tourists can be classified under different typologies according to their motivation and personal needs. The understanding then, of tourist typologies provides deeper knowledge of the decision making processes that may be needed for different consumer segments (Cooper, Fletcher, Fyall, Gilbert, & Wanhill, 2005).

Early research on tourist typologies was done by Cohen (1972) who identifies two differences of tourist typologies namely: institutionalised travellers and non-institutionalised travellers. Institutionalized travellers are typified by their highly organised mass tourist structure. Cohen describes them as being confined to an 'environmental bubble', whereby their decisions are already made by the tourism industry and their needs are satisfied by the tourism infrastructure. The tourists' transport, accommodation, attractions and necessary itinerary arrangements are usually made by travel agents from their home countries. On the other hand, the non-institutionalised typology depicts the 'explorer' or the 'drifter' kind of tourist who does things spontaneously. Cohen describes the non-institutionalised typology as those travellers who avoid conventional facilities, are spontaneous, risk takers, independent and always seem to have multitudes of options of what they can do or how to do it. They generally do not work with a fixed itinerary because they have a limited budget.

Cohen (1972) says that the non-institutionalised tourists share particular characteristics that differ from institutionalized tourists. He has noted that generally speaking, tourism experience has a degree of novelty and familiarity. However, the degree to which novelty and familiarity are experienced on a trip depends on the individual choices and preferences by the tourist and also the institutional setting of the individual trip. As indicated in Table 3 Cohen (1972) saw a continuum between novelty and familiarity which suggests the basic underlying variables for the analysis of modern tourism. This division of the continuum leads to typologies of different tourist experiences. Cohen (1972) came up with four typologies of tourists namely: the organised mass tourist, the individual mass tourist, the explorer and the drifter.

- **Institutionalised form of tourism**

Cohen (1972) identifies that the organised mass tourist and individual mass tourist are part of institutionalised tourism, with their characteristics of pre-planned trips, and their use of travel agents or multi corporate hotels. Cohen (1972) also notes that since tourism aims to serve a large number of customers, these tours have to be processed as efficiently and quickly as is possible therefore requiring a lot of experience about the tourist and the tourist industry so that everything is ordered, predictable and controlled.

The organised mass tourist is known to be less adventurous and always remains within the confines of tourism spaces in the fashion of what Cohen calls the 'environmental bubble'. In this case, this is where a tourist stays in confined spaces that will remind them of home and which creates a sense of continuity and lack of newness to their trips. The example of the mass tourist's activities involves buying packaged tours that are all inclusive, having guided tours and lodging in extremely comfortable accommodation and travelling with air conditioned buses that tend to travel at high speeds and on time through the country side. The activities of the organised mass tourist are fixed well in advance as a package ready to be purchased and attractions are guided tours and moving with tour guides. The mass tourist makes no decision about the tour as this is where familiarity is at its maximum and novelty at its minimal along the continuum (Cohen, 1972). Thus the key purpose of mass tourism is the visiting of attractions, whether those attractions are genuine or artificial (Cohen, 1972). Cohen argues that even if these tourist attractions are genuine, they are manipulated and transformed by the tourist industry in order to make them suitable for the mass tourist consumption. In other words, they become a commodity for the tourist. These attractions are supplied with facilities, constructed, staged and managed for the mass consumer (Cohen, 1972). This is seen as the mass production tourism system. The attractions will eventually lose their fascination and beauty and ultimately lose their originality and become isolated from the host community.

Cohen (1972) explains that there are certain similarities and differences between organised mass tourist and the individual mass tourist. The main difference may be that the individual mass tourist' trip is completely preplanned and is also not bound to any

group and therefore has some control over time and activities that will be done, although most of the activities and bookings are made through a travel agent. The individual mass tourist infrequently ventures out but into well-trodden routes, so that familiarity is still at its maximum but lesser than the organised mass tourist type.

- **Non- institutionalised form of tourism**

The drifter and explorer tourist are seen as non-institutionalised although they are distinct from each other in terms of the way they venture out of the tourist system and in their attitudes towards the host community. Cohen (1972) describes the explorer as the type of tourist that plans his/her own trip, tries to get off the beaten track but at the same time stays in comfortable accommodation and uses reliable means of transport. The explorer tourists try to associate themselves with the local people and want to learn the local language as well. Cohen (1972) sees the explorer as that type of tourist who wants to escape the 'environmental bubble' more than the other types, although they do not go to extremes in doing it. The explorer dominates in novelty, although they do not completely immerse themselves into the local community. They still hold back and stay in their comfort zone. Cohen (1972) explains the drifter as the type of tourist that ventures further away from the beaten track and ignores completely the 'environmental bubble'. The drifter avoids any connections with popular tourist establishments and wanders on their own or lives with the local people and takes up jobs in the host country to sustain themselves. The drifter immerses himself or herself with the local people in such a way that they share shelter, food and habits. He has no fixed time-table of doing things and no well-defined goals when travelling. For him/her, novelty is at its maximum and familiarity does not exist.

Table 3: Tourism typologies

<p>The organized mass tourist:</p> <p>Low on adventure maintains ‘environmental bubble’. Purchases of ready-made packaged tours, is guided through the destination, has little contact with the local people.</p>	<p style="text-align: right;">Familiarity</p> <p><i>Institutionalized tourism:</i></p> <p>Dealt with routinely by the tourism industry, including tour operators, travel agents, hotels and transport operators.</p>
<p>The individual mass tourist:</p> <p>Similar to the above but more flexible. Has scope for personal choices. The tour is still organized by the tourism industry and the ‘environmental bubble’ still shields the real experience of the destination.</p>	
<p>The explorer:</p> <p>The trip is organized independently and is looking to get off the beaten track. Although comfortable accommodation and reliable transport, the environmental bubble is abandoned occasionally.</p>	<p><i>Non-institutionalized tourism:</i></p> <p>Individual travel, minimal contact with the Tourism, except when absolutely necessary.</p> <p style="text-align: right;">Novelty</p>
<p>The drifter:</p> <p>All connections with the tourism industry are rejected and trip avoids familiar spaces. Has no fixed itinerary, lives with local people by immersing with the local culture.</p>	

Source: Cooper *et al.*, (2005:61) adapted from Cohen (1972)

2.7 Summary

The chapter covers some of the theoretical frameworks that are applied in this study. In the literature motivation was chosen as the appropriate framework for segmenting backpackers on the basis of similarities and differences. The chapter started with a brief analysis of general human motivation and travel motivations which reflected on the basic theories that are central to tourism motivation, such as Maslow’s hierarchy of needs and Pearce’s career ladder. Both theories can provide an understanding of tourist motivation for the backpacker tourist and show how people in the tourist industry can try to satisfy their needs. The chapter also included an analysis of backpacker motivation, leading to the examining of some of the basic themes in backpacker motivation.

CHAPTER 3

UNPACKING THE BACKPACKER

3.1 Introduction

The study of backpacker motivation has proved to be a complex study that consists of many debates and arguments. One of the most intriguing arguments made is whether backpacker motivation is the same for the different tourist travellers. Loker-Murphy (1996) asks the question whether all backpackers are motivated to travel for the same reasons. If not, he wants to know how their motives to travel differ and whether they have different desires and preferences. The literature presented in this chapter aims at pointing out the key aspects of backpacker motivational studies, which focus on backpacker demographics, rite of passage issues, identity issues, activities, movements and spaces. Additionally, this chapter will review the diversity of the backpacking phenomena by exploring the institutionalisation and non-institutionalisation of backpacking.

3.2 Backpacker demographics

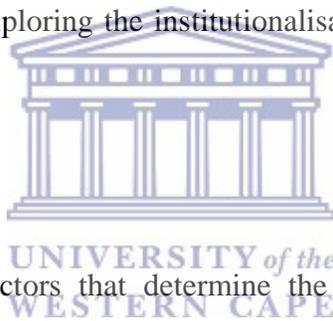
3.2.1 Nationality

Nationality is one of the key factors that determine the diversity of backpackers because backpackers come from different places of origin and therefore they are different from each other. Ian & Musa (2008) observe that most backpackers that visited Malaysia came mostly from the United Kingdom. In a similar study, Moshin & Ryan (2003) indicate that in Australia, Britain made up 35 % of the sample and the second most represented group was Australia, which made up 17.7 % of the total sample.

Although more and more nationalities are being represented, backpackers are still predominantly of Western origin (Sorensen, 2003). Noticeably, European groups are the common or dominant nationalities in this industry and this is one of the major characteristics of the backpacker industry. Israeli backpackers can also be found in large numbers in Europe and Australia.

3.2.2 Gender

Previous research on the gender of backpackers shows a balanced distribution of male and female groups. This is the general overview of the backpacker literature on gender. Garnham



(1993) cited in Newlands, 2004) argues that during the early 1990's, backpacker tourism mostly comprised more males than females. Loker-Murphy (1996) has observed that there is some kind of balance in gender distribution among backpackers in Australia, with a constitution of 50.6 % of males and 49.4 % females. On the other hand Newlands (2004) shows an unanticipated result of 39 % male and 61 % female. This is surprising in a sense that these findings present more females than males and that women are increasingly travelling as backpackers. In South Africa, the study done by the DTI (2007) shows that there is not much difference in gender in the backpackers that are visiting South Africa as it was found that 52 % of the sample were male representatives and 48 % were female representatives. Richards & Wilson (2004c) commented that more and more women are becoming an important aspect in the backpacking industry and are becoming dominant travellers in some destinations. Richards & Wilson (2004c) also show that women travel with motives to develop new friendships with fellow backpackers or the local community. Cave & Ryan (2007) explain that males were more interested in taking part in core adventure activities, like sky diving, bungee jumping and mountain-biking. Females were more interested in products which included heritage sites, making friends and meeting new people, and in finding their own personal challenges.



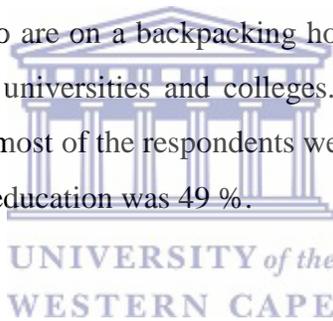
3.2.3 Age

While a lot of people assume that most backpackers are young people, there have been no specific studies indicating that age is a restricting factor (Markward, 2008). Hetch & Martin (2006) state that backpacking is less about chronological age but more about travel choices. In fact, most findings in the backpacker literature show that age is irrelevant because it is a weak indicator of people's interest and behaviors (Markward, 2008). One can argue that age is important in backpacker tourism there have been many older groups of backpackers though research has not yet been conducted in order to confirm this. However, on the other hand, Loker-Murphy (1996) believes that the greatest number of backpackers has been predominantly young people with the average of 25 years, meaning that 90 % of the respondents were aged 30 and below. Backpackers to South Africa are mostly between the ages of 21 and 30 (70%), followed by those below 20 (15%), those over 35 (11%) and those over 50 (4%). The average age of international backpackers to South Africa has been given as 28 (DTI, 2007). These findings are consistent in terms of the ages of the tourists for other destinations. Moshin & Ryan (2003) point

out that most of their respondents were young people with 74 % of them being between the age group of 20 – 29 years. However, 12.7 % of the respondents represent the 40 years and above age. Although this group is a minority, it is somehow significant, agreeing with the claims made by Loker-Murphy (1996) that an older segment within the Australian backpacker market does exist. The age profile appears to have changed and shifted over the years as it seems more likely that the older backpacker age group is becoming more common.

3.2.4 Education

Backpackers to South Africa are well-educated and often people who are already working on their professional career. Consistent with backpackers in other global destinations, 70% are believed to have tertiary or post-graduate university qualifications, 17% of them taking a gap year in between studies or profession training. Some of the common areas of profession include law, IT, computers and engineering (DTI, 2007). The Newlands (2004) study reveals that there are a great number of students who are on a backpacking holiday in New Zealand, while at the same time studying at Australian universities and colleges. In an Australian study by Loker-Murphy (1996), it is reflected that most of the respondents were well-educated and the number of respondents that had college level education was 49 %.



3.2.5 Budget

Backpackers are known to be budget-oriented tourists who basically live on minimal budget expenditure. The essential budget components of backpacking include accommodation, transport, food and other socio-cultural activities. Backpackers who have visited South Africa are known to have spent more money on accommodation (R2 686 per trip) which is then followed by activities/leisure (R2 490 per trip) and food (R1 880 per trip) (DTI, 2007). It is important to note that backpackers to South Africa do not consistently spend money across all categories as is the case with Australia (DTI, 2007). However, in Scotland, most of their budget is spent on accommodation (R94 - R237 per night), followed by food and beverages (R15 – R158 per day). The expenditure on transport varies, depending on the nature of activities undertaken (Leslie & Wilson, 2006). It seems that a low amount of money is spent on attractions and entertainment in Scotland, since 79 % of those surveyed said that they had visited pubs. However, backpackers rarely spend money on shopping, gifts or souvenirs (Leslie & Wilson, 2006).

3.3 Contexts of backpacking

3.3.1 Length of stay

The diversity of backpacking is also evident in the length of stay at a place or destination. A study done in Scotland found that, based on the actual and intended stay of backpackers, the average stay was over three weeks (Speed & Harrison, 2004). This study can also indicate that Australians tend to stay the longest at 8.25 weeks, Canadians 5.1 weeks, New Zealanders 4.3 weeks while the shortest stay was by the Germans at 2.6 weeks. This shows that backpackers generally stay longer than the normal mass tourist. Studies have shown that backpackers spend less time in South Africa compared to other destinations such as Australia, Southeast Asia or the United Kingdom. Their stay in these destinations is 2 – 4 times longer than in South Africa, probably due to lack of job availability in South Africa that would enable them to extend their stay (Kamilla SA Sport and Tourism Consultancy & City of Cape Town, 2009).

Slaughter (2004) comments that backpackers are generally long term travellers and stay for longer periods of time in a place or destination. This may be due to the availability of jobs/internships, studies or volunteer programmes. Kain & King (2004) comment that backpackers may choose to travel within a destination longer than their intended duration and may extend their holidays by up to six months or more. They suggest that longer stays of backpackers can increase their expenditure and this may play a positive role on the economic impact of the country of destination. Furthermore, Richards & Wilson (2004b) believe that backpackers are time-rich individuals because they engage in time intensive activities that they are not able to do at home.

3.3.2 Information source

Kain & King (2004) investigated the influence of sources of information that is used by backpackers, particularly on accommodation, tours and activities at the place or destination. They found that most backpackers rely mainly on guide books as a source of information about accommodation while they also rely highly on friends and family for tours and activities. The research on backpackers in Cape Town (Kamilla SA Sport and Tourism Consultancy & City of Cape Town, 2009) contends that when backpackers are planning for their trip to South Africa, their main channels are the use of the Lonely Planet guide book, word of mouth

recommendations, Internet (travel blogs, South African Tourism website), the Coast to Coast book, previous visits, family and friends, tour operators, brochures, volunteer programmes, travel agents and the Best of Backpacking Southern Africa book. Surprisingly, Kain & King (2004) discovered that in Australia, websites and backpacker magazines were the least influential sources of information for all products, excluding accommodation. According to Newlands (2004) backpackers use a variety of information sources to gain information before their departure and during their trip. These sources include brochures, magazines and newspapers, but the main sources are guidebooks. Lonely Planet guide books, in particular, are read a lot before the trip starts. During the trip, Newlands (2004) found that backpackers make use of family and friends, hostel staff and word of mouth from fellow backpackers as their main source of information.

3.3.3 Transportation

Little research has been conducted on backpackers with regard to transport (Vance (2004)). The studies that have been done on backpacker transport have barely touched base on the growth and development of backpacker transport operators. Some other studies on backpacker transport have observed many variations in travel modes from structured backpacker tours to completely independent travel that attracts different backpackers. Vance (2004) has realised that these backpacker transport operators are available to accommodate the backpacker within their flexible and independent styles of travelling, although one can argue that, to some degree, this gives the sense of their trip being structured or organised. This development is referred to by Vance (2004) as flexible ticketing. Vance (2004) also remarks that Ireland, Scotland and South Africa have a number of backpacker-oriented transport operators which provide jump-on and jump-off services which are similar to those that operate in Australia and New Zealand. This is the system that the Baz Buses use in South Africa. However, there are also other transport options or methods that are available for backpackers, which are increasingly significant in terms of usage, including domestic buses or intercity buses as well as hitch-hiking.

Vance (2004) notes that the destination characteristics (including ease of access to transport services, the cost of transport services and also the arrangement and the distribution of tourism facilities and the independent travel market in a place or destination) play a major role in shaping and determining backpackers' transport choices in such a way that the more developed the

backpacker market in the place or destination is, the more it will create a demand for transport services

Vance (2004) also looks at the relationship between transport and motivation and notes that the motivation for travel has an impact on the length of stay, as it will influence the transport choice of the backpacker. The trends that Vance (2004) depicts in his study indicate that those backpackers who are visiting for short periods tend to use the organised backpacker transport services or the domestic public transport services, most likely due to the time limit factor. He observed that backpackers who are staying longer periods tend to hire or purchase a vehicle, therefore suggesting that the duration of the trip influences one's transport choice.

3.3.4 Accommodation

Leslie & Wilson (2006) have identified that backpackers have a preference for budget accommodation, such as hostels. This is similar to the findings by Loker-Murphy & Pearce (1995) where it was found that backpackers are likely to spend at least one night in a range of inexpensive accommodation, particularly at the homes of families and friends, camping and backpacker hotels. However, Speed & Harrison (2004) consider the fact that backpackers are also open to using rented houses and motels as accommodation options. In a South African context, the research on backpackers in Cape Town (Kamilla SA Sport and Tourism Consultancy & City of Cape Town, 2009) has revealed that there has been an increase in backpacker accommodation in South Africa, particularly in the Western and Eastern Cape. An interesting factor in this study is that it points out the fact that global trends are also being observed of constantly modernising backpacker accommodation in response to the dynamic and changing demographics of the backpacker market.

Kain & King (2004) have reported on other forms of accommodation that backpackers make use of, which may include self-catering accommodation, guest houses, campervans or motor homes, bed and breakfasts and private houses. Some of these accommodation types seem paradoxical to the nature of backpackers as budget travellers, particularly guest houses and hotels as they may be very expensive. Kain & King (2004) discovered that a few backpackers may sleep in their own vehicles or in provided huts.

Hetch & Martin (2006) add that most young backpackers seem to look for hostels for accommodation, simply because hostels provide an exciting environment and give rise to the opportunity for meeting other backpackers and to simply enjoy one's independence. Hetch & Martin (2006) see hostels as an experience rather than just a form of accommodation. However, they also mention that older backpackers tend to seek hostels that will provide a variety of different room types, but within the limits of their budgets. These older backpackers view hostels as a form of accommodation rather than as an experience.

3.3.5 Backpacker spaces

The backpacker scenes and sights have become an important part of the tourism economy, particularly backpacker facilities, and this has caused a change in the nature of backpacker tourism and its facilities. This includes spatial changes such as the growth of enclaves (Wilson & Richards, 2008). These authors explain the role of the enclave as a social and inter-cultural and identity formation space. They argue that these are customised spaces catering for visitors which offer familiar or similar comforts as those at the places of origin of these visitors. Newlands (2004) makes an analogy of the enclave being a refueling station whereby backpackers can take a hot shower, buy imported beer, use the internet and watch the latest movies.

The term 'enclave' has been used and applied in tourism literature for backpacker places of destinations, especially in conventional tourism and to the tourist bubble (Wilson & Richards, 2008). Edensor (1998) cited in Wilson & Richards (2008) explains the idea of the enclave as giving relative uniformity or having the role of being a homogeneous tourist space. However, he also argues that in the case of backpacker enclaves, the idea of homogeneity is challenged by the variety and diversity of these spaces, just because it serves as a meeting point where backpackers have the opportunity to socialise. These spaces are colonised spaces with a minimal sense of independence where backpackers are confined to these controlled, comfortable and safe spaces that are separate from the rest of the local community. Newlands (2004) says that there are some well-established enclaves that are pressured to provide sophisticated backpacker services. Therefore, these enclaves still provide the idea of 'touristification'. Although Newlands (2004) argues that backpackers have often sought to avoid the 'touristification' of the enclaves and have gone on to find new spaces elsewhere, he also points out that at the same time, this will

ultimately lead to the development of new backpacker spaces, eventually becoming enclaves, as other backpackers will try to follow these escape actions to new undiscovered spaces.

Hottola (2008) talks about meta-world or meta-space as a place of alternative societal rule where there is a perceived notion of control of the situation. Hottola explains that tourists are actually more in control and less vulnerable in their enclaves or bubbles than they are in public spaces where there are major cultural differences and less adaptive abilities. Therefore, backpackers differ in their ability to adjust.

Additionally, Wilson & Richards (2008) state that the enclave plays a role of bringing together the backpacker and the local community in a controlled way, where the locals focus on the backpacker, of which somehow the space of the enclave has the power to turn backpackers into economic resources to be consumed by the locals and also become the spectacle for the local. Wilson & Richards (2008) see the enclave as an instrument for mediating cultures, so that cultural confusion is avoided. As much as cultural confusion is avoided, one can argue that cultural fusion is taking place in these spaces.

Wilson & Richards (2008) refers to backpacker enclaves as meta-spaces, they see this as moving beyond the individual backpacker towards a relationship between structure and action, something which helps to explain the spaces of backpacker consumption. Wilson & Richards (2008) elaborate on 'spatial suspension', where the backpacker may be 'suspended' between two cultures in a backpacker enclave that has combinations of the West and the 'Other', which is the local community. They further argue that the backpacker enclave provides space where norms, values and expectations are suspended between the West and the 'Other'. Additionally, their analysis focuses on the relativity of being 'here' nor 'there', whereby backpackers cannot be 'here' because the 'real' experience is outside the enclave, but they are not 'there', because they are surrounded by the familiarity of the enclave when outside of the enclave.

3.3.6 Backpacker movements

Hampton (1998) proposes that backpackers generally set new trends by discovering new destinations and developing new markets within the newly discovered places or destinations. Welk (2004) finds that backpackers are motivated to search for authenticity and to travel off the beaten track, looking for areas that have not been contaminated by other backpackers or tourists.

However, Welk (2004) finds this as a paradox in the sense that backpackers search for unique experiences off the beaten track, thereby discovering new places that other backpackers will visit and then eventually many more tourists will also visit these places. He gives the example of a German backpacker who was disappointed in the commercialisation of Bali, who then went out-of-the-way to visit Gilli islands off the coast of Lombok. For this reason Welk (2004) points out that backpackers today find it difficult to get off the beaten track. However, Sorensen (2003) clarifies that the areas off the beaten track need not to be without tourism developments, despite the mentality of getting beyond tourism, because most backpackers who travel off the beaten track do not go to totally unknown places, but stay within or near the places that are in the guidebooks.

Hampton (1998) found that in Southeast Asia, backpackers tend to follow well-trodden paths consisting of the typical backpacker routes. Hampton explains that the typical backpacker route begins with a cheap flight to Bangkok, through to South Thailand and Peninsular Malaysia, to Singapore and across to Sumatra, Java, Bali, Eastern Indonesia and Australia, although some routes may be reversed. However, in South Africa the research on backpacker tourism in Cape Town (Kamilla SA Sport and Tourism Consultancy & City of Cape Town, 2009) reveals that the Western Cape is the most followed backpacking place or destination in South Africa, particularly Cape Town as the main destination of international backpackers.

Sorensen (2003) did an ethnographic study on backpackers and through his observations he discovered that Southeast Asia is the most popular space for international backpackers and Bangkok is their main gateway to the region, after arriving in Bangkok most backpackers will go to Khao San Road. Sorensen (2003) describes Khao San Road as the embodiment of the backpacker ghetto, filled with restaurants, travel agents, internet cafes and bookshops.

3.3.7 Backpacker identity

The questions and debates on backpacker identity have been more common in backpacker literature and have been discussed by many scholars in tourism. This question of backpacker identity has been found to be a complex one with lack of clarity on what a backpacker really is. Richards & Wilson (2004b) found that 64% of the respondents identified themselves with the term 'backpacker' which was basically used to describe their travelling style. Richards &

Wilson's analysis therefore sees an overlap between the categories of the terms backpacker, traveller and tourist. As a result, in their study 40% of the backpackers also viewed themselves as tourists and the rest perceived themselves as travellers. Richards & Wilson (2004b) discovered that this analysis creates some complexity in the sense that it seems many of the respondents see themselves as having multiple travel styles, therefore creating multiple and flexible identities.

On the one hand Welk (2004) discusses the metaphors of backpacker identities, determining that 'anti-tourism' functions to preserve the backpacker's distinct identity type and these anti-tourist attitudes are a vital constituent in the construction of backpacker's identities. Additionally, he notes that backpackers avoid being associated with the term tourist and even avoid tourists by avoiding main tourist sites. Some reject the term tourist and prefer being called a traveller because they perceive themselves as better than tourists. This is echoed by Sorensen (2003) who also posits that most backpackers maintain a distinction between travellers and tourists. Welk (2004) continues to argue that the dissociation from mainstream tourists is constructed as a symbolic idea with symbolic limitations preserved through the adoption of ideological values. Sorensen (2003) points out that backpackers' position themselves as a representative group that is of a better type of tourism and by this sustain a division of a backpacker as 'us' and tourists as the 'other'. As a result Welk finds it difficult to draw the line between backpackers and other forms of tourism, since backpacking has become somehow sophisticated and institutionalised.

Richards & Wilson (2004d) interestingly point out at the perceptions that 'real' backpacking is a dying phenomenon. Westerhausen (2002) cited in Richards and Wilson, (2004d) suggests that the 'real' backpackers have conformed to the ways of mainstream tourism. Richards & Wilson (2004d) note in their study that the older respondents and those respondents who have taken more trips in their lives are more likely to call themselves travellers or backpackers, whilst the tourist label was more recurrent among the younger travellers under the age of 20. Richards & Wilson (2004d) also argue that there are some individuals who prefer not to be labeled at all.

3.3.8 Backpacker activities

Backpackers are primarily in search of new and exciting experiences and want to get involved in a wide range of activities. Backpackers are more active than normal tourists, because they want

to experience a lot of activities in order for them to be able to tell a story about their trips. Richards & Wilson (2004d) posit that backpackers participate in a wider range of activities than the other travellers, in the expectation that these trips may have a sense of a 'once in a life time' experience. As a result, this necessitates them to take part in every available experience. Richards & Wilson (2004d) discovered that there is also a relationship between backpacker motivation and their activities taken during the trip. All those who were motivated by 'experience' motivation, which includes being involved in the host community's cultures or developing their skills, are presented as being more active than those who have relaxation motivation, which includes the avoidance of their daily grind. The study done on backpackers in Cape Town (Kamilla SA Sport and Tourism Consultancy & City of Cape Town, 2009) shows that backpackers have taken part in a wider variety of activities than normal tourists, due to their extended stay. This is similar to the remarks made by Richards & Wilson (2004d), that backpackers have a tendency to do more of everything whereas the normal tourist participates in a lesser number of activities, due to the fact that backpackers have a hunger for experience and have the time to experience a lot in order to justify their trips. Richards & Wilson (2004d) state that backpackers also take part in two types of activities, which are the passive activities such as chilling by the beach, and also extreme activities which are more adrenaline pumping.

Richards & Wilson (2004d) note that backpackers have similar activities to those of other tourists, in spite of the fact that backpackers want to differentiate themselves from tourists. The most popular activities include visiting historical sites, walking, sitting in cafes or restaurants and shopping, while the other popular activities for backpackers include observing wildlife and nature, which shows the propensity of going to wilderness areas. The least important activities include learning a new language, academic study, working as a volunteer worker or earning money. The dominant activities in South Africa are found mainly in Cape Town because places such as Coffee Bay are limited to activities such as hiking, drinking in hostel bars and participating in activities that are organised by the hostel (Visser & Barker, 2004b).

Although it is noted that the activities that backpackers participate in in Cape Town do not really differ from the other activities that backpackers participate in in other places. However, the most popular backpacker activities consist of exploring Table Mountain by hiking or using the cable car, visiting Green Market Square, Cape Point, Robben Island and the Castle of Good Hope, as

well as going on wine tours and township tours. Richards & Wilson (2004d) also argue against the idea that backpackers have a separate set of activities from tourists. Backpackers also spend time in backpacker hostels sitting around and doing very little and just ‘hanging out’.

3.3.9 Backpacking as a rite of passage

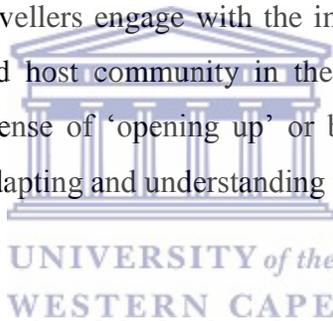
The rite of passage has always been a useful model in understanding the dynamics and functions of backpacking (Cohen, 2004). Leslie & Wilson (2006) suggest that backpacking has become a rite of passage for many young people, and Cohen (2004) also notes that backpacking is often associated with life crises and transitions, the transition from adolescence to early adulthood, particularly in Western societies.

Cohen (2004) describes this rite of passage model as a transition that takes place when the youthful backpackers exit their normal lives, isolating themselves from their families and society to enter unfamiliar spaces. These backpackers see this as way of proving to themselves that they can make independent decisions and resolve problems on their own without any parental assistance. Maoz (2007) examined Israeli backpackers’ motivations he found that after high school these backpackers went on to serve in the army and never departed from their parents, and were conformist. However, when they take on the backpacking journey they overcome their conformist way of life. Moreover, the study by Cohen (2004) gives an explicit description on the rite of passage and how it is modeled.

The model of the rite of passage includes a middle stage between separation from the community and re-entry to a new status (Cohen, 2004). This is a liminal middle stage where a person undergoes a deep personal experience, when they return from their backpacking trips and claim that they have gone through a deep personal change and maturation. This claim however, indicates the fulfillment of their desire for independence and personal growth (Noy & Cohen, 2005). Cohen (2004) explains that the apparent reversal of home on the trip and the need to deal with unfamiliar and dangerous situations alone arise out of being able to adapt to the host community’s culture and unfamiliar spaces. However, Cohen (2004) argues that adaptation to unfamiliar spaces is made easier by emergence of backpacker enclaves where it is easier for the backpacker to adapt to unknown destinations. Cohen (2004) notes the separation from home, explaining that backpackers keep in touch with home by means of Internet cafes that are usually

available in most tourist destinations, particularly in backpacker enclaves. Cohen (2004) describes the parent-child relationship in Western society, whereby rite of passage is commonly practiced, where the youth seek independence at an early stage and where they engage in activities that their parents are unaware of. Cohen (2004) also discusses how backpacking is a sense of reversal of their life back home and how the native society usually represents the rite of passage. As a final point, the fundamental condition of liminality that Cohen (2004) notes is the sense of being free and away from home which gives an opportunity for new experiences.

Matthews (2008) perceives that the source of freedom and authentic experiences functions as a materialistic rite of passage that contributes to the development of cosmopolitan youth identities. The uses that backpackers make of their freedom and their experiment of new experiences are the factors that create or recreate backpackers' sense of identity (Cohen, 2004). Matthew (2008) sees travel as an identity forming experience and as a transitional period in the life cycle of individuals. In addition young travellers engage with the interplay between self and other and also between places of origin and host community in their search for meaning, which will eventually give the individual a sense of 'opening up' or being open-minded. This sense of being open-minded is created by adapting and understanding the host community's way of life.



3.4 Segmentation

3.4.1 Understanding the heterogeneity of the backpacker market

Diversity amongst people is an important element of life. Variety provides easy understanding and brings with it simple solutions to problems (Smith, 1995). One of the challenges in tourism analysis is to find a practical compromise between ignoring heterogeneity of the world and at the same time being overwhelmed by the same heterogeneity. However, one of the methods of discovering this is segmentation (Smith, 1995). Tourism literature suggests that the industry would be advised to develop innovative products that meet the needs of the increasingly diverse backpacker market, because backpackers are not a homogeneous market (Newlands, 2004). Research done on backpackers seems to confirm that backpackers are not a homogeneous group, but is rather made up of different segments (DTI, 2007). A study by Riley (1988) positions backpackers as one general group rather than different sub-segments. Various criteria have been applied in order to recognise different segments of backpackers, with domestic and international backpackers being the most basic sub-division. Other segmentation can be made in terms of

motivation, with sub-categories such as volunteer work, study and working holidays (DTI, 2007). The heterogeneity is evident whether it is viewed in terms of age, nationality, motivation, or organisation of trip (Sorensen, 2003). The backpacker market has the potential to be segmented into different sub-groups, based on combinations of profiling factors (Leslie & Wilson, 2006). For instance, young backpackers could be profiled into one sub-group as ‘youth travellers’ whilst the older age group could be categorised as ‘eco-cultural’ backpackers (Leslie & Wilson, 2006). However, the enticing question to raise would be as much as backpackers are different from each other, are they however, different from mass tourists, or maybe backpacker tourism be considered as just another form of mass tourism?

The tourism industry has positioned backpackers as different from the mainstream tourist but not different from each other (Loker-Murphy, 1996). Cohen (2004) notes the irony in the backpacker’s search for freedom while they seek to do their own thing – most do similar things just like the conventional tourist. Most of them travel similar routes, participate in similar activities and stay in backpacker enclaves. The perception of backpackers being a homogeneous group of travellers different from mass tourism, but not different from each other, may result in some of the visitors being dissatisfied with the place of destination’s offerings (Loker-Murphy, 1996). It seems backpackers have adopted conventional ways of travelling, and somehow have become institutionalised through travel routes or infrastructure. Sorensen (2003) suggests that considering the heterogeneity of backpackers, more research is needed on the specific sub-segments. He particularly notes the sub-segment of short-termers and how they indicate a potential growth of backpacker tourism. He notes that the short-term backpacker’s travel style is backpacker-like, since they are involved in the same activities and travel to the same places as ordinary backpackers although they have time limits therefore covering less geographical areas than ordinary backpackers (Sorensen, 2003). Further manifestations on the diversity of backpacker tourism are depicted in a study of backpackers in India and Sri Lanka, whereby the heterogeneity of the contemporary backpacker is observed and comprehensive typologies of backpackers were identified (Hottola, 1999 cited in Ateljevic & Doorne, 2004).

The other typologies that were identified included:

- Students: world travellers with a purpose of seeing the world
- Professionals: academics, journalists, musicians or working holiday

- Eco-packers: seeks unspoiled and natural environments
- Army discharges: mainly consists of Israelis who are in a transition between the army and return to the civil society
- Freaks and neo-hippies: clustered on beaches and counterculture communities
- Root diggers or old hippies: revisiting the past travel experience and places

The evolving diversity and increasing heterogeneity among backpackers proposes a challenge to tourism marketers with regards to target marketing of different sub-groups (Leslie & Wilson, 2006). Considering the intensity of diversity and variety among backpackers, the use of the general category of backpacking to refer to all individual groupings of backpackers may be so broad that it may even lack significance (Moaz, 2007). Moreover, there seem to be differences among backpackers from different countries in terms of their motivation, perception of freedom, escapism and their interaction with other travellers (Moaz, 2007). Backpacker studies should thus refrain from regarding backpacker tourism as a single entity (Moaz, 2007). Backpacker tourism is meaningfully segmented, in particular with regards to the consumer behavior and the underlying cultural values that specifically guide that behavior (Ateljevic & Doorne, 2001).

3.4.2 Segmenting the backpacker market

Heterogeneity is one of the most important characteristics of the tourism market, hence there is need for dividing the market into segments (Slabbert & Laurens, 2011). Market segmentation is an analytical technique that is used to sub-divide heterogeneous groups into homogeneous sub-groups (Park & Yoon, 2009). The logic behind segmentation is to define groups of travellers that are reasonably similar to each other but are different from other groups (Smith, 1995). George (2008: 141) defines market segmentation “as the way which tourism companies divide a market into smaller, more clearly defined groups that share similar needs, wants and characteristics”. The purpose of segmentation is basically to identify and profile a segment based on a criteria in order to discover the diversity of the market segmented with the aim to develop the product so that it appeals to the group it seeks to serve (George, 2008). Segmenting tourists is difficult because of the diversity of the tourism market, therefore tourists’ needs and wants and motivation which need to be identified in order to segment the market intelligently so that the segments can be sustainable (Lubbe, 2003). The emerging diversity and increasing of heterogeneity poses a challenge in terms target marketing and satisfying the travellers needs in

general (Leslie & Wilson, 2006). Therefore, in this instance, segmentation can help provide an insight to the diverse motivations of backpackers. A number of in-depth studies have been conducted with regards to motivation based segmentation.

Loker-Murphy (1996) had done a motivation-based segmentation study of backpackers in Australia where it was clear that backpackers in Australia are not one homogeneous group of travellers and they are not motivated to travel by the same reason. The two primary motivational factors were the need for excitement/adventure and meeting other local people (Loker-Murphy, 1996). The results of the cluster analysis using motivational factors revealed four motive-based clusters, including Escapers/Relaxers, Social/Excitement-Seekers, Self-Developers and Achievers (Loker-Murphy, 1996). A study was also conducted by Park & Yoon (2009), where the primary purpose of the study was to segment and profile the motivation of tourists in order to understand rural tourism in Korea, by using a cluster segmentation approach. The secondary aim of the study was to contribute to the discussion of appropriate market segmentation criteria and the use of statistical methods in tourism research (Park & Yoon, 2009). Another study was conducted in the Kruger National Park in South Africa on motivation based clustering, the purpose of which study was to identify tourist clusters for the Kruger National Park based on travel motivation by performing factor analysis and cluster analysis (Slabbert & Laurens, 2011).

3.5 Summary

This chapter discussed debates in the literature of backpacker tourism, focusing mainly on the nature of backpacker tourism, looking at trip-related information such as information sources, transportation, accommodation, activities. The literature review analysed the context of backpacker tourism involving backpacker spaces and backpacker movements. Questions and debates on backpacker identity were also covered. Backpacking as a rite of passage was useful in understanding the dynamics and functions of backpacking. The chapter ends by highlighting on understanding the heterogeneity of backpacker markets and the segmentation of the backpacker market. The next chapter presents the methods used to achieve the objectives of the study.

CHAPTER 4

METHODOLOGY

4.1 Introduction

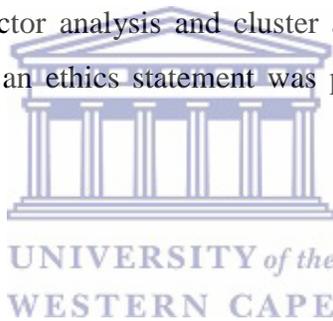
The purpose of this chapter is to explain the methods and techniques that were employed in the study. The research methodology assisted the researcher to answer the research questions and to gain an in-depth understanding of backpacker motivation and to segment the backpacker market. The context and access to the study will be discussed, indicating where and when the study was conducted. The main participants included for the study are the backpackers. The research methods that were used in the study were both qualitative and quantitative. The qualitative data was drawn from unstructured interviews that were held with the participants. Participant observation was also employed as a data collection method. Quantitative data was collected through questionnaire surveys. Factor analysis and cluster analysis are utilised to analyse the questionnaire data. Additionally, an ethics statement was provided and the limitations to the study will be discussed.

4.2 Research approach

4.2.1 Qualitative approach

In order to achieve the objective of this study, a qualitative methodology was employed to corroborate the quantitative one. The qualitative approach constitutes broad ways of collecting data which all aim to understand the subject, rather than just measuring it (Rasmussen, Ostergaard & Beckmann, 2006). The qualitative approach is explained as being rather more dynamic and holistic with interpretation emerging and developing throughout the research process (Leedy, 1997). Qualitative research explains the underlying phenomena, where the researcher enters the setting with an open mind as he/she interacts with the participants (Leedy, 1997). The qualitative approach unpacks the realities of backpacker tourism and brings in surprising and unexpected questions about the backpacker phenomenon.

The purpose of a qualitative approach is not to generalize about a population group, but aims to discover the underlying and conscious motives that are behind people's actions (Rasmussen *et al.*, 2006).



In this instance we unravel the world of backpacking, in particular backpacker spaces and movements, how backpackers are constructed by the tourism system and how they make sense of their own travel experiences. Most often, the qualitative approach is undertaken because there is a lack of theory, or the existing theory does not sufficiently explain the phenomenon (Merriam, 2002). One of the aims of this research is to contribute to the existing research on backpackers and to question the existing definitions of this phenomenon in order to think about clearer and explicit definitions that adequately explain this phenomenon.

4.2.2 Quantitative approach

The purpose of quantitative research in this study is to explain the heterogeneity that may exist among backpackers who are visiting South Africa, by means of segmenting the backpacker market into different sub-groups according to travel motivation and also to provide a demographic profile of backpackers visiting South Africa. Creswell (1994) (cited in Leedy, 1997:104) defines a quantitative study as ‘an inquiry into social or human problem, based on testing a theory composed of variables, measured with numbers and analysed with statistical procedures in order to determine whether the predictive generalisations of the theory hold true’. This involves a reality that is fixed, single views and a measurable phenomenon (Merriam, 2002). Leedy (1997) describes the nature of the research process in a quantitative study as focused, context free with detached views and standardized instruments. The main quantitative instruments employed in this study are questionnaire surveys which were distributed among backpackers and analysed using SPSS.

4.3 Participants

When the field work was underway the participants were identified as backpacker travellers. The participants that were involved in the study included individuals who were international travellers from various parts of the world and some domestic travellers. The study focused on individuals who were travelling by the Baz Bus and individuals who stayed at backpacker hostels in the Western Cape, Eastern Cape and Kwa-Zulu Natal. The surveys were conducted among these individuals in the hostels and along the way. Other role players in the study included the owner of The Coffee Shack Backpacker Hostel in Coffee Bay. The owner was chosen because he obviously knew the market very well. Other participants that were met randomly in the hostels

included three male backpackers who also through conversation told me their interesting travel stories which played a role in this research.

4.4 Study area

The study area consisted of backpacker routes through the Western Cape, Eastern Cape and Kwa-Zulu Natal in South Africa. These routes were constructed from suggestions provided by the Coast-to-Coast Backpacker accommodation guide book and the Alternative Routes guide book. The map below illustrates the route that was travelled.

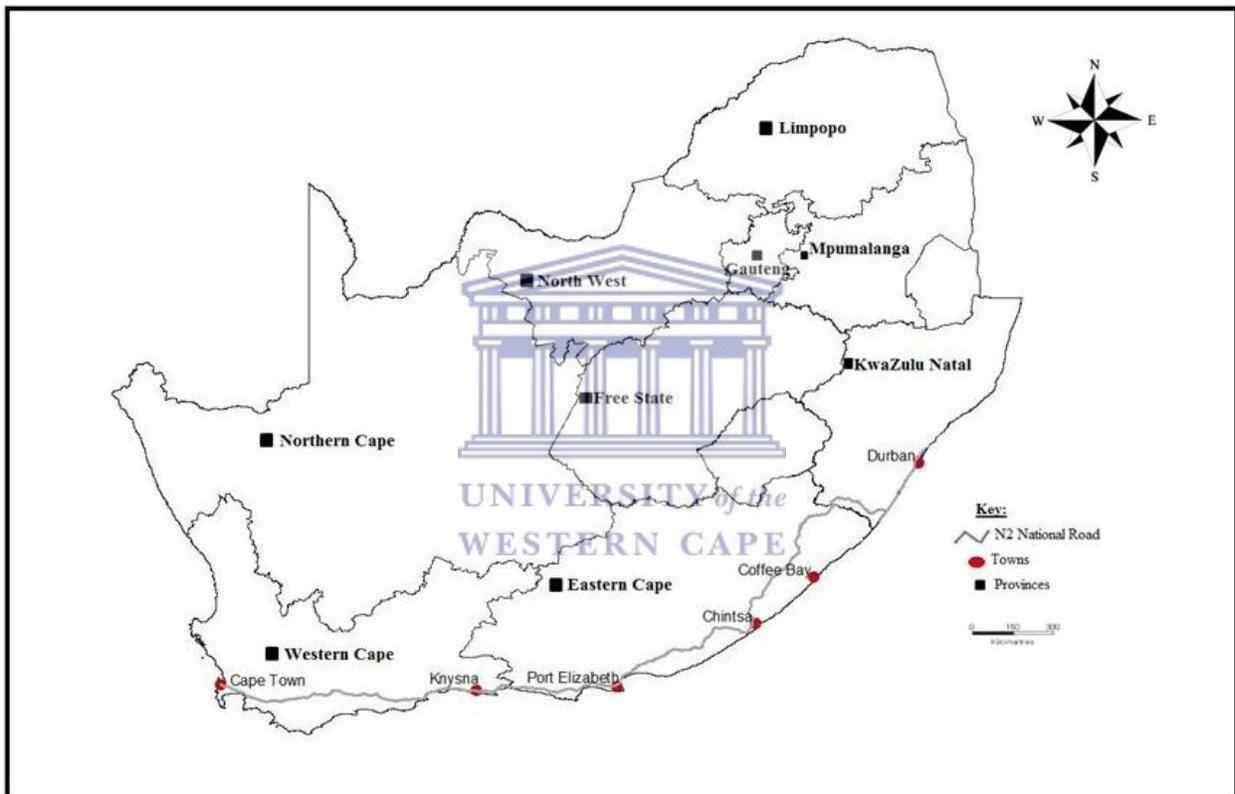


Figure 2: Route of Study Area South Africa (Author)

In order to achieve the objectives of the study, the researcher travelled to various cities and towns using the Baz Bus, which is a hop-on hop-off hostel-to-hostel bus service that is mainly targeting backpackers. The research took place in the Baz Bus and hostels in different areas. The distribution of the surveys and informal interviews took place in:

- **Cape Town:** Cat and Moose Backpackers, Ashanti Lodge & Travel Centre, Penthouse on Long, Long Street Backpackers, Carnival Court Backpackers, Blue Mountain Backpackers, The Two Oceans Backpackers, Forty8 Backpacker Hotel.
- **Knysna:** Island Vibe Backpacker Hostel
- **Port Elizabeth:** Hippo Backpackers and Lungile Backpacker
- **Chintsa:** Buccaneers Backpackers
- **Coffee Bay:** Coffee Shack Backpackers
- **Durban:** Nomads Backpackers and Tekweni Backpacker hostels

4.5 Sampling method

4.5.1 Convenience sampling

In this study the convenience sampling method was used. Convenience sampling is a type of non-probability sampling method. This type of sampling involves the researcher selecting the most readily available respondents regardless of characteristics until the sample size is reached. There are no strict selection rules and the sample can be drawn in whatever way is easiest for the researcher (Tansey, 2007). Since convenience sampling involves easy access to participants by the researcher, the surveys in this study were distributed at the most reachable hostels and since the Baz Bus was used as a means of transportation by the researcher, some surveys were also distributed on the bus. However, in convenience sampling it is unlikely that the sample would represent the whole population. This means that generalisation cannot be made from the population being studied (Finch & Fafinski, 2012). However in the survey the gender and country of origin were taken into account.

4.5.2 Sample size

It was not possible to calculate the population size accurately, but with a population greater than 1000, as was the case, the sample of 202 respondents would result in a confidence level of 95 %, and a confidence interval of 7 % (www.surveysystem.com). Thus when all the 202 respondents are included, one should be 95 % certain that no estimated percentage will be off by more or less

than 7 %. In case where less than the 202 respondents are included, the margin of error will be greater.

4.6 Data collection methods

4.6.1 Participant observation

One of the major advantages of qualitative research is that it can include the observation of behavior in its natural setting, with the advantage to the researcher of increasing the understanding of the subjects under investigation and by taking note of how they actually live in their world (Chadwick, Bahr & Albrecht, 1984). Observational data represents a first-hand informational encounter with the participants (Merriam, 2002). An ethnographic approach is employed in this study by applying a participatory traveller's assessment technique. Ethnography consists of a unique set of data collection strategies and participant observation is one of them. Participant observation occurs when the researcher becomes part of the situation being observed (Leedy, 1997). The ethnographic process requires an extensive amount of time in the field in order to gather useful insights into the subject. In ethnography field notes have the function of keeping track and giving a reflection on what is being observed (Rasmussen *et al.*, 2006). The field notes were collected when speaking to backpackers on the Baz Bus and at various hostels, whereby the events, experiences and interactions with backpackers are described. The participant observation took place during April and December 2012, because this is the expected peak time for backpacker arrivals and hostels are usually fully booked at that time of the year. This method illustrates a better understanding of who backpackers really are, the nature of their activities, their reasons for being here, the places they go to and how they see themselves in the tourism world, their type of movement and the spaces that they encounter or claim during their trips. Two weeks were spent travelling around different hostels between the Western Cape, Eastern Cape and Kwa- Zulu Natal with the Baz Bus, which is designed for the budget traveller and many backpackers travelling along backpacker routes inside and outside of Cape Town prefer to use it.

4.6.2 Questionnaire survey

Survey research is a technique of collecting data on a specifically defined group of individuals that have to answer a number of identical questions, of which answers to those questions form the data sets of the study (Baker, 1999). The aim of a questionnaire survey in this study was to

describe behavior or feeling and/or to test relationships between variables (Chadwick *et al.*, 1984). The characteristics of a survey include seeking responses directly from the respondents, creating a direct interaction between the instrument and the respondents. There are two types of surveys, interview surveys, whereby the replies from the respondents are recorded, and questionnaire surveys, whereby the respondents are asked to record their responses themselves on the questionnaires provided (Lin, 1976). In this study a questionnaire is used to collect information from the respondents. The backpackers filled in the survey details themselves.

The questionnaire was formulated through a comprehensive literature review and by gathering information from backpackers through insightful conversations during time spent doing a pilot survey at the Cat Moose Backpacker hostel in Cape Town prior to the construction of the survey questionnaire. The main objectives of the questionnaire was to address the research concerns and find out if any significant sub-groups existed through market segmentation. In order to obtain information about segments of backpackers, a total number of 202 questionnaires were distributed among backpackers. Most of the questionnaires were distributed at different backpacker hostels and some on the Baz Bus. The questionnaire included a combination of open-ended and closed-ended questions, which covered aspects of backpackers' travel behaviors, interests and motivation.

The survey consisted of three main sections namely: a demographic section, a section covering trip-related information and a section on travel motivation. The first section, on demographics included questions on age, gender, country of origin, daily budget and level of education. The reason for including these questions was to provide a demographic profile of backpackers who are visiting South Africa as well as for comparing those findings to the existing demographic literature on backpackers. The second section contained trip- related questions, things like how they planned their trips, duration of visit, modes of transport, types of accommodation, activities engaged in and the overall trip experience. These questions were useful in this study in a sense that they brought up relevant insights about the backpacking industry in South Africa. The third section included a list of 17 motivation statements where the participants were asked to rate their importance on a Likert scale of 1 – 5. This section was included in the questionnaire because it provides the study with the data to create backpacker sub-groups with specific motivations. The motivation statements enabled the researcher to group the backpackers according to their

similarities and differences. The data for the questionnaires was captured on Microsoft Excel and analysed on SPSS (Statistical Programme for Social Sciences).

4.7 Data analysis

4.7.1 Qualitative data analysis

This type of analysis involves organising the notes collected in order to address the primary research question (Baker, 1999). A variety of qualitative data analysis techniques exist that the researcher can make use of (Rasmussen *et al.*, 2006). In a qualitative research data analysis is simultaneous with the data collection, in other words data analysis forms part of the data collection process the researcher begins analyzing data with the very first observation or interview (Merriam, 2002). This allows the researcher to make adjustments along the way, bringing in new and interesting ideas to the study. In this study the data is analysed by abstracting meaningful words, phrases and narratives from the field notes and the informal interviews. All these are then categorised accordingly. This strategy is useful in identifying the common patterns and the underlying themes. Various themes were identified and discussed, some of which included backpacker routes, backpacker spaces and backpacker identity. The idea was to question the existence of the backpacker and also providing an in-depth analysis of backpacker motivation in a narrative form where the stories of the backpacker was told in order to capture the real nature of the backpacking phenomenon.

4.7.2 Quantitative data analysis

There are two types of segmentation methodologies, *a priori*, and factor and clustering (Smith, 1995). *A priori* is based on random choice of one or more variables by the researcher to develop segments. However, factor and cluster segmentation produces statistically defined segments and more meaningful results (Smith, 1995). There are two key issues that one must consider in determining whether data is suitable for factor analysis, the sample size and the strength of the relationship among variables (Pallant, 2011). It is generally recommended that the larger the sample size the better the reliability, because with small samples the correlation coefficients among variables are less reliable (Pallant, 2011). Another area of concern is the strength of the intercorrelation among the variables. There are two statistical measures used in SPSS to assist in assessing the factorability of the data, Bartlett's test of sphericity and the Kaiser-Meyer-Olkin

test (KMO). Bartlett's test of sphericity should be significant ($p < 0.5$) in order for the factor analysis to be considered appropriate. The KMO should range from 0 to 1, with 0.6 suggested as the minimum value for good factor analysis (Pallant, 2011).

Factor analysis begins with the construction of a correlation matrix, in which the values of each sampled individual on each variable are compared to their values on all other variables (Smith, 1995). Correlations amongst variables range from -1.0, considered a perfect inverse correlation, to 1.0, considered a perfect direct correlation (Smith, 1995). After the correlation matrix is computed, factor analysis then examines the pattern of correlations in order to find the most suitable combination of variables that will summarise the pattern (Smith, 1995). Thereafter, a new set of variables called factors are defined, each factor is a set of the original variable multiplied by weights called loadings. Loadings represent correlations between the original variable and the newly defined factor (Smith, 1995).

A guideline is used to determine which factors are worth keeping for further analysis and the most common statistical guideline is the eigenvalue (Smith, 1995). The eigenvalue is the measure of the explanatory power of each factor relative to the set of original variables (Smith, 1995). Typically, researchers choose to work with eigenvalue greater than 1.0. (Smith, 1995). After the factors have been selected they are then named. Factor names are selected on the basis of the loading produced (Smith, 1995).

A cluster analysis is a multivariate technique that aims to identify market segments (Slabbert & Laurens, 2011). This approach is useful in that it determines market niches and classifies tourists into groups (Slabbert & Laurens, 2011). Clusters should have high internal homogeneity and external heterogeneity. There are different types of cluster analysis used in social sciences, but the most widely used is hierarchical clustering (Smith, 1995). In hierarchical clustering, forming clusters happens through a hierarchy of stages (Cramer, 2003).

Hierarchical clustering methods can either be divisive or agglomerative. Divisive techniques begin by placing all cases into a single, large cluster and progressively sub-dividing one cluster at a time into two clusters, according to the rules that focus on maximizing the differences between the clusters obtained from each division (Baggio & Klobas, 2011). The results are usually showed in a tree diagram that helps the researcher to decide which branches describe

meaningful and useful clusters. The agglomerative works by characterising each case as a single cluster and step by step joining the most similar pairs of clusters until all clusters are joined together in a single large cluster (Baggio & Klobas, 2011).

The next step is to decide which clustering method to be used. The agglomerative hierarchical clustering methods are suitable for both the categorical and metric variables, those offered by SPSS are suitable for metric or categorical data but not both. The most used is the unweighted pair group method using arithmetic averages. The average distances between clusters are calculated and clusters are joined to maximize the mean distance between cases. The median of each cluster is the point that represents the most common value among all cases in the cluster variables and distances are calculated on the basis of matching (Baggio & Klobas, 2011). The Ward's clustering method is a useful method when the variables that characterize clusters are all metric. Ward's clustering method assigns individuals into clusters that can be measured by the total sum of squared deviations of every point from the mean of the cluster to which it belongs (Everitt, 1980).

Once the clustering method and distance measures have been chosen hierarchical clustering analysis is entrusted to the computer which then produces the proximity matrix which then proceeds to join clusters according to the rules of the clustering method. Decisions on how many clusters are likely to represent the groups are based on the distance at which clusters are joined. The further apart the clusters the more likely are they to form a meaningful distinction of clusters (Baggio & Klobas, 2011). The researcher can then decide on how clusters will be formed.

The One way-ANOVA is used to assess how clusters are distinct. The One way-ANOVA procedure is commonly used to test the significant differences between groups so that the results of the ANOVA can provide meaningful evidence to make claims provided that certain claims are met. Statistical programs such as SPSS make calculating One way-ANOVA easier (Allen, Titworth & Hunt 2009).

4.8 Comparison of clusters

Comparing clusters is learning whether an observed distribution of data significantly differs from what is expected of them. In such occurrences the chi-square coupled with a cross-tabulation table can be used as a useful analytic technique (Allen *et al.*, 2009). The chi square allows the

researcher to compare an observed set of data against an expected set of values to see how the observed data fits into what was expected. In this study chi-square is used to compare the clusters against the activities to determine what type of activities each cluster would be interested in participating in. The chi-square is illustrated by a cross-tabulation table (Allen *et al.*, 2009).

The results of the chi-square are interpreted by their significance. The chi-square shows that the observed distribution differs significantly from the expected distribution. Through examining the differences between the observed and expected counts with each cell, a conclusion can be drawn of which cell contributed most to the significant chi-square. The difference in values for each cell provides a basis for interpretation (Allen *et al.*, 2009).

4.9 Ethical considerations

During the data collection process, ethical issues were adhered to in order to secure the rights of the participants. The participants were fully informed of the purpose of the research and told that their participation is voluntary and their confidentiality was guaranteed. The identity of the respondents was only going to be known by the researcher and was not going to be given to any other person. The respondents have also provided their signatures in order to show that they fully agree to part take in the study. A letter was provided and telephonic arrangements were made by the supervisor to the marketing director of the Baz Bus in order for the researcher to conduct the surveys in the bus and permission was approved by the marketing director. Additionally, when the surveys were distributed amongst the backpackers, a brief explanation was given on the purpose of the study.

4.10 Limitations of the study

During the research process a number of problems and challenges were experienced, these included financial constraints, language barriers and difficulty in approaching people.

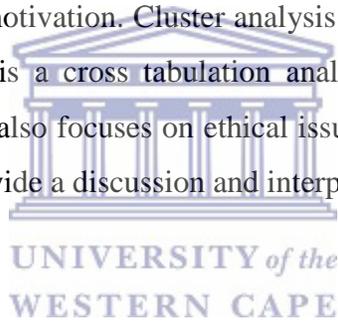
- Financial constraints: The data collection process needed the researcher to travel from Cape Town to Durban over a period of two weeks using the Baz Bus. However, the trip itself was very costly for the researcher as a student.
- Language barriers: Most respondents were international travellers with some of them not that familiar or had a clearly understanding of the English language, considering that the survey was written in English. Therefore language problems were encountered. This was

particularly very common amongst travellers from Korea, Japan and some Germans. However, the researcher had to give a thorough explanation on some of the questions in the survey in order for them to understand.

- Approach: The researcher also experienced some difficulties in approaching some of the travellers.

4.11 Summary

This chapter focused on the research design of the study. To achieve the objectives of the study research was conducted using both qualitative and quantitative approaches. The qualitative approach was acquired by applying a participant observation technique. The quantitative approach was achieved by conducting a survey questionnaires. The survey questionnaires were distributed in different hostels and on the Baz Bus. Factor analysis was undertaken to gain additional insight on backpacker motivation. Cluster analysis was used to divide the respondents into segments. For further analysis a cross tabulation analytic technique is used in order to compare the clusters. The chapter also focuses on ethical issues and the limitations to the study. However the next chapter will provide a discussion and interpretation of the acquired data.



CHAPTER 5

DISCUSSION AND INTERPRETATION OF RESULTS

5.1 Introduction

This chapter presents and discusses the research findings according to the objectives of the study. The central objective was to segment the backpacker tourism market in South Africa in order to ascertain if any significant sub-groups exist. The secondary objective was to construct a demographic profile of backpackers visiting South Africa, explore the extent to which there was institutionalisation and non-institutionalisation of backpacker tourism in South Africa and to segment the backpacker market into different sub-groups according to travel motivation. Firstly, the chapter reveals the demographic characteristics of the respondents and trip-related data. Secondly, data on backpacker identity, travel experience, either institutionalised or non-institutionalised backpacker tourism, is presented. Finally, factor analysis is carried out to gain additional insight on backpacker motives. Cluster analysis was performed in order to determine the different segments. After determining the clusters a cross-tabulation was carried out in comparing the difference between the demographic characteristics and clusters.

5.2 Profile of respondent's demographic information

5.2.1 Nationality

Nationality is also a determining factor for the variety of backpackers. Since not all backpackers visiting South Africa come from the same place, they would be different from each other and within themselves. In this study (Table 4) it was found that 30 countries were represented of which 60 % were European, particularly Germany with 20 % of respondents and the United Kingdom with 7 % this is followed by America with 23 % of respondents. These findings are in accordance with the backpacker literature on nationality, with European group being the most dominant nationalities (Moshin & Ryan, 2003; Loker-Murphy, 1996).

While Australian backpackers are also usually one of the most dominant nationalities in backpacker literature, in this study backpackers visiting South Africa from Australia represented

only 2.0 % of the respondents. Through observation it appears that backpacking is fashionable among white Western nationalities, with blacks and Asians comparatively rare.

Table 4: Demographic Profile of Respondents (N=202)

	Label	Percentage
Nationality	Africa	10
	Asia	5
	Australia	2
	America	23
	Europe	60
Gender	Male	48
	Female	51
Age	Under 20	12
	21 - 30	73
	31 - 40	10
	41 - 50	3
	51 - 60	2
	60 +	1
Education	No formal education	.5
	Started university / college but not yet completed	32
	High School	10
	Degree/Diploma	42
	Postgraduate	13
	Other: (Specify)	2

*Rounded off to the nearest whole number

5.2.2 Gender

In terms of gender it was discovered that 49% of the respondents were male and 51% were female (Table 4). This shows a fairly balanced dispersal between males and females. These results are similar to the study by Loker-Murphy (1996) revealed a more balanced gender distribution among backpackers in Australia which constituted of 51 % males and 49 % females. Additionally, these findings also agree with the study done by the DTI (2007) which revealed that there is not much difference in gender in the backpackers that are visiting South Africa, where it was found that 52 % of the sample were male and 48 % were female.

Although this is a fairly balanced result between the two genders, the women group is still greater than the male group. This tells us the women group is growing in the backpacker market, and that women are slowly becoming a significant factor in backpacker tourism. Richards & Wilson (2004a) note that women are becoming an important aspect in the backpacking phenomena and are becoming dominant travellers in some areas.

In the observations it is found that most women usually travel in a group of friends or in pairs, but rarely alone, particularly German women who were mostly part of a volunteer group or exchange student group. However, there are a few women who do travel alone, for various reasons. For example, in this study it was found that one woman from Europe was travelling alone. She had just finished her Master degree in Psychology and wanted to take a break and relax after her studies. Richards & Wilson (2004a) have noted that recent events had shown that backpacking alone is not entirely safe for women. This could be an indication that males are more likely to be travelling alone while most women would travel with their partner, family or with a group of friends, because safety in backpacker travels is increasingly becoming an issue for the women travelling in foreign countries.

5.2.3 Age

In backpacker tourism age plays a significant part in defining the identity and uniqueness of the group, for the reason that backpackers are recognized as basically youthful people who travel to explore the world and enjoy their youth. Table 4 shows that the under 21 years age group represented 12 % of the sample, the age group of 21 – 30 was 73 %, the age group of 31 – 40 represented 10 % of the sample size, the 41 – 50 age group represented 3 % of the sample size, the age group of 51 – 60 years represented 2 % and the last group, while was 60 plus, represented only 1 % of the sample size.

The most represented age group in the study is 21 – 30 years which represents 73 % of the total sample size. It is evident that backpackers travelling to South Africa are predominantly young people who are transiting to their adult-hood life stage. This corroborates the study done by Moshin & Ryan (2003) who found that most of their respondents were young people; 74 % were between the age group of 20 – 29 years. Kamilla SA Sport and Tourism Consultancy & City of Cape Town (2009) also found that 70 % of backpackers who visit are between the ages of 21 –

30 and 11 % are over 35 years and 15 % are under 25 years. However, the older group was well-represented in this study, the 40 and above only represented 5 % of the sample size which makes it a minority group, meaning that the older groups of backpacker are not that common. However, this differs with the observations made by Loker-Murphy (1996) that the older segment within the Australian backpacker is becoming more common. Additionally, a study by Moshin & Ryan (2003) found 13 % were above the age of 40 years represented a smaller portion of the respondents. This shows that there has not been much of a shift in the age group of backpackers, particularly with the older group of backpackers.

5.2.4 Education

Backpackers are generally known to be educated people with higher educational qualifications or are travelling as students, which is an increasing segment in the backpacking industry. Table 4 reveals that there were few respondents with no formal education, in fact only 1 % of the respondents. 32% of respondents had started university/college, but had not yet completed. Only 10% of the respondents were still in high school and 42% of respondents had degrees/diplomas, while there were 13% with postgraduate qualifications. It is evident that the majority of backpackers seem to be well-educated and hold tertiary qualifications. Although there was only 1 % of the total number of backpackers with no formal education, it is evident that the backpackers who are not concerned with being a qualified professional do exist. To corroborate this argument one of the interviewed backpackers remarked:

‘Instead of being a lawyer I travelled. I went to Italy, Holland, England, Switzerland, Australia, Mali, Thailand, Cambodia, Vietnam, India, Nepal, South Africa, Lesotho, Egypt, Spain, Ireland, Poland, Slovakia, Hungary and still on the way’ (Backpacker 1, 2012)

It seems some backpackers are not even interested having fixed careers or professions, they would rather educate themselves through travel.

5.3 Trip related data

5.3.1 Visit to South Africa

In table 5 it is portrayed that only 32% of the respondents indicated that they had been to South Africa prior to this visit and 68 % of the respondents indicated that they have never visited South Africa before. It is apparent that South Africa received a lot of repeating visitors.

5.3.2 Travel information

Backpackers use a variety of information sources to gain information about the places they are visiting, both before their departure and during their trip. These sources include brochures, magazines, guidebooks, websites and newspapers (Newlands, 2004). As presented in Table 5, it was found that only 57 % of respondents used the internet, 64 % obtained information from friends and family, 7 % attained information from brochures/pamphlets, and 46 % used travel guidebooks (most respondents indicated that they had particularly used the Lonely Planet and Coast to Coast guidebooks).

5.3.3 Duration of visit

Backpackers are known to have longer stays than the normal tourist and their longer stays give them a chance to take part in more activities and have further travel experience. In this study it was found that backpackers who stayed in South Africa less than a month represented 30 % of the respondents, backpackers who stayed one to six months represented 53 % out of the total respondents, backpackers who stayed one year and more represented 10 % out of the total respondents and backpackers who stayed more than six months but less than a year represented only 5% and only 2 % indicated that they are South African citizens. The most represented group of stay is the one to six months with 53% respondents the reason for this stay may vary because some stay for six months since they are involved in a six months volunteer programme or have a six months internship.

5.3.4 Travel companions

Most backpackers are known to travel alone or in a group of friends. Table 5 shows that 31 % of the respondents travel alone, 14 % of the respondents travel with their partners, 46 % travel with their friends, 4 % of the respondents travel with their family and only 6 % indicated they had other travel companions. It seems that backpackers tend to travel within a group of friends. Backpackers are motivated to travelling alone because they want to create a feeling of 'being in my own space'. The observation in Coffee Bay revealed that some of the backpackers make companions with fellow backpackers along the way and travel together throughout their trip. At the same time backpackers enjoy travelling alone one of the backpackers remarked:

'I travel by myself. This is my personal time, time to heal myself' (Backpacker 3, 2012)

It seems backpackers have different reasons for travelling alone or travelling with companions. Others just enjoy meeting new people along the way others want to travel unaccompanied.

Table 5: Trip related data (N=202)

	Label	%
Visit to South Africa	Yes	32
	No	68
Travel information	Internet	57
	Friends/Family	63
	Brochures/Pamphlet	7
	Travel Guidebook	46
	Newspaper/Magazines	6
	Agent	5
	Other	14
Duration of visit	Less than a month	30
	1-6 months	53
	1 year +	10
	6 months+ but less than a year	5
	SA citizen	2
Travel Companions	Alone	31
	Partner	14
	Friend/s	46
	Family	4
	Other	6
Planning of trip	Travel Agent	8
	No planning	17
	Planned myself	63
	Guidebook	20
	Internet	29
	Other	8

*Rounded off to the nearest whole number

5.3.5 Planning of the trip

Backpackers are known as travellers that usually do not plan their trips. In this study respondents were asked how they planned their trips. Table 5 illustrates that of all the respondents, only 8 % made use of a travel agent to plan the trip for them, 17 % did not make any planning, 63 % of the respondents planned their own trip independently. Most did not use guide books to plan their trip and only 20 % did use them, 29 % made use of the internet to plan their trip and 8 % used other means to plan for their trip. It is apparent that backpackers are spontaneous individuals hence most of them did not plan for their own trips, questing for the element of surprise on the trip, as one of the interviewed backpackers remarked:

'I follow the stars, the universe leads me to each destination' (Backpacker 1, 2012)

'Things will come to you, I can't plan what is meant to be, destiny leads my adventures, like now I feel like going to Morocco' (Backpacker 1, 2012)

The data also illustrates who backpackers tend to avoid the use of travel agents. This might be because they are motivated by the idea of wanting to teach themselves how to take responsibility for their actions and being able to rely on themselves as a way of gaining knowledge about the challenges of world.

5.3.6 Modes of transport used within South Africa

Transport is an important feature in backpacker movements, due to their flexible time and mobility schedules. Respondents were asked which mode of transport they have used or intended to use in South Africa. Of all the respondents, 45 % indicated that they have used the Baz Bus, 47 % have used metered taxis, 42 % have used rented cars, 27 % have used Inter-city buses, 39 % have used mini bus taxis, 10 % have used bicycles and 26 % have indicated that they used other modes of transport that are not mentioned above. Hitch-hiking also came up as one the forms of transportation used.

Backpacker transport varies in many ways from structured transport systems or tours to independent modes of travelling. However, in this instance, the Baz Bus seems to be common among backpackers as it was one of the most commonly used mode of transport, although one could argue that using the Baz Bus is a conventional way of travelling, as compared to using a rented car which has a sense of independence and freedom to one's travel experience. Backpackers tend to follow well-trodden paths on typical backpacker routes (Hampton 1998). The Baz Bus accommodates the flexibility styles of backpackers, but it is still organized among popular destinations within South Africa or typical routes that include Cape Town-Port Elizabeth-Durban. It does not provide a sense of travelling off the unbeaten track to destinations such as Graaff-Reinet. The way that these routes are constructed gives one the sense that backpacker tourism is somehow commercialized, the tourism system seems to construct these routes in ways that result in backpackers being less in control about the places they visit.

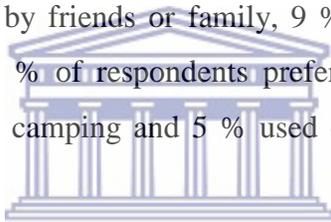
Table 6: Modes of Transport (N=202)

Modes of transport used/intend to use within South Africa	%
Baz Bus	45
Metered Taxi	47
Rented Car	42
Inter - City Bus	27
Mini Bus	39
Bicycle	10
Other	26

*Rounded off to the nearest whole number

5.3.7 Accommodation

Respondents were asked what type of accommodation they use or intend to use while staying in South Africa. Table 7 shows that 94 % of the respondents preferred using backpacker hostels, 26 % preferred being accommodated by friends or family, 9 % used a Bed and Breakfast, 15 % preferred using a guest house, 10 % of respondents preferred using rented apartments, 6 % preferred using hotels, 19 % were camping and 5 % used other types of accommodation that were not mentioned in the table.

**Table 7:** Type of Accommodation (N=202)

Type of accommodation used/intend	%
Backpacker Hotel	94
Friends Family	26
Bed & Breakfast	9
Guest House	15
Rented Apartment	10
Hotel	6
Camping	19
Other	5

*Rounded off to the nearest whole number

Backpackers are generally known as budget travellers and this explains why they would chose to stay in cheaper hostels, rather that expensive hotels. Most of the respondents seem to prefer sleeping in backpacker hostels rather than any other accommodation. Backpackers are likely to spend one or more nights at a backpacker hostel (Loker-Murphy, 1996). It is important to note the different meanings that backpackers assign to their hostel stays. One of the reasons that

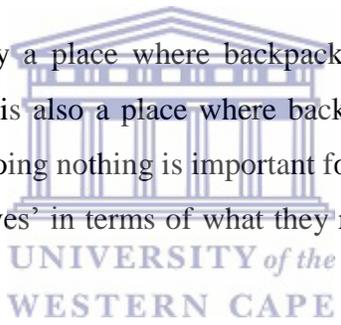
backpackers would prefer using hostels is that they are not only seen as a form of accommodation, but also as a place that provides an exciting environment and meeting other fellow travellers (Hetch & Martin, 2006). However, in this study, respondents were also asked to state their reasons for choosing that particular accommodation type. Table 7.1 demonstrates that 26 % of respondents said it was close to the City Centre, 35 % chose it because of easy accessibility, 79 % said it is cheap and only 23 % had other reasons.

Table 7.1: Reason for accommodation (N=202)

Reason for accommodation	%
Close to City Centre	26
Easy Access	35
Cheap	79
Other	23

*Rounded off to the nearest whole number

Hostel accommodation is not only a place where backpackers sleep, but also a space where backpackers have fun. The hostel is also a place where backpackers spend time doing nothing and just hanging out. Time spent doing nothing is important for backpackers as it is used for self-introspection and to ‘find themselves’ in terms of what they really want. This idea of the hostel also creates enclave spaces.



5.4 Reason for travelling to South Africa

Each traveller may have different reasons for travelling to South Africa. The respondents were asked to rate, on a Likert Scale of 1 (not at all important) to 5 (very important), their reasons for travelling to South Africa. Most respondents said that they travelled to South Africa ‘to see South Africa’s natural environment, 57 % rated it as very important. This was followed by 52% who chose the destination ‘to see South Africa’s diverse culture’ and also rated it as very important. Some 19 % backpackers chose South Africa in order for them ‘to experience good weather’ and these rated it as just important. Those who wanted to experience the music, dance and good food was 33 %. Those who wanted ‘To attain world knowledge and educate myself’ were only 47 % and were rated as very important. Those who wanted ‘to study new languages’, but saw this as not important at all were 9 %. The respondents who felt travelling to South Africa was ‘cheap and affordable’ were 9 %. Travelling for backpackers therefore has a purpose, no

matter what the reason is. It seems that each traveller has a different purpose to travel that may be different from the rest of the other travellers and is motivated by different reasons. Most travellers are attracted to travel to South Africa by its natural environment that may include the natural scenery, wildlife and beaches. Others were motivated by the desire to meet the local people and experience their diverse cultures.

Table 8: Reasons for travelling (N=202)

Reasons for travelling to South Africa		Not at all important	Not important	Neutral	Important	Very important
To see South Africa natural environment	Percentage	3	3	5	32	57
To see South Africa diverse culture	Percentage	4	4	12	29	52
To experience the good weather	Percentage	6	12	29	34	19
To experience the music, dance and good food	Percentage	3	10	20	34	33
To attain world knowledge/educate myself	Percentage	4	6	10	34	47
To study new languages	Percentage	31	25	25	10	9
It is cheap and affordable	Percentage	16	24	37	15	9

*Rounded off to the nearest whole number

5.5 Activities

Backpackers are searching for exciting experiences and often want to take part in socio-cultural experiences that they have never done before. Respondents were asked to choose the activities they participated in whilst in South Africa and Table 9 illustrates that most of the respondents, 85%, went to the beach. Clubbing and partying was experienced by 70 % as the second most popular of the activities. This is followed by visiting national parks 68 %, hiking 62 %, visiting natural sites 70 %, just taking walks in Africa 57 %, game viewing sites 55 %, visiting museums and historical sites 54%, visiting rural villages 46 %, going on a wine tours 45 %, going on a township tour 43 % of the respondents. The activities that were less in popularity included respondents being involved in voluntary work 36 %, going to festivals 29 %, shark diving 24 % and 15 % who indicated that they had participated in other activities.

It is surprising to see that most of the respondents were involved in more passive activities, such as going to the beach. Backpackers are generally known in Europe and Asia to engage in more adrenaline inducing activities, such as shark diving, which was one of the least popular activities.

These more or less passive activities may suggest that backpackers were motivated to seek more relaxed holidays. Considering the fact that some backpackers are fairly young people, who generally enjoy going out and being part of the night life, it is not surprising that so many said that they went partying and clubbing and the second most popular activity for them. They are particularly found at such places as Long Street in Cape Town or some of the hostels where they can indulge in alcohol drinking. Some took part in Booze Cruises and boast of being out at sea on drinking voyages. Not only are backpackers involved in fun activities, but they are also motivated to learn and educate themselves about the places that they visit. Over a half of the respondents visit museums and historical sites. Above all, most activities can qualify as unique experiences to them. There were some backpackers who were involved in more physical activities. Most of the respondents agreed that they were involved in hiking and walking. In the study by Kamilla SA Sport and Tourism Consultancy & City of Cape Town (2009) it is shown that exploring Table Mountain by hiking is one of the key activities of backpackers in Cape Town. Visiting national parks is also high in terms of popularity. Richards & Wilson (2004d) noted that observing wildlife and nature was far a more popular activity for backpackers than anything else, which indicates the tendency for many of them to go trekking in wilderness areas.

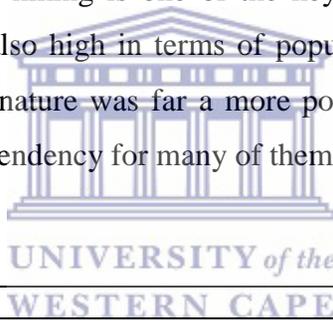


Table 9: Activities (N=202)

Activities	%
Clubbing & Partying	70
Museums & Historical sites	54
Visiting National Parks	68
Visiting Rural Villages	46
Visiting Natural Sites	70
Township Tour	43
Wine Tour	45
Game Viewing Sites	55
Beaches	85
Shark Diving	24
Walking	57
Festivals	30
Volunteer Work	36
Hiking	62
Other (Specify)	15

*Rounded off to the nearest whole number

5.6 Identity

This is an issue where we inquire about the representation of the backpacker and how they view themselves from the rest of the world and other travellers. In the study, backpackers were asked questions on how they define themselves, whether or not they viewed themselves as tourists, independent travellers, on working holiday, student travellers or as a mere backpacker. Table 10 indicates that 34 %, of the respondents viewed themselves as student travellers followed by 25 % who perceived themselves as mere backpackers. Of the total respondents, 20 % viewed themselves as independent travellers, 12 % as tourists, 6% as being on a working holiday and 3 % defined themselves as other.

Table 10: Defining the self (N=202)

Defining Self	%
Tourist	12
Independent traveller	20
On a working Holiday	6
Student traveller	34
Backpacker	25
Other (specify)	3

*Rounded off to the nearest whole number

Richards & Wilson (2004d) found that 64 % of the respondents he dealt with identified themselves with the term ‘backpacker’, while the rest saw themselves as either a ‘tourist’ or a ‘traveler’. Richards & Wilson’s analysis shows an overlap between the terms backpacker, traveler and tourist and the fact that the respondents saw themselves as having different travelling styles creates multiple and flexible identities. From the answers of the respondents, it seems most of them are students who are using backpacking styles to travel. Students seem to be a sizable number of backpackers who are one of the representative segments in backpacker tourism. The study presents a low number of respondents who defined themselves as ‘tourists’. Backpackers seem to have an ideology of being ‘anti-tourist’, and they always seem to want to maintain the distinction between being a backpacker and being a tourist.

Respondents were asked if they see themselves as different forms of tourists and if so they were also asked to explain how they see themselves as being different. Table 11 presents that of all the respondents, 66 % agreed and the rest, which is 34 %, did not agree to see themselves as

tourists, 30 % of the respondents said they do not see themselves as tourist, the reason they gave for this was that it was because ‘they take part in activities of the local people’. Only 15 % said they see themselves different because they were ‘staying for a longer period of time’. Some of the respondents who said that they ‘do not like tourist things,’ were 11 % of the total number and gave the reason that they were ‘students. Only 5 % remarked that they are volunteering or that ‘they were working’. The other respondents, 3%, mentioned that they are ‘South Africans’, 3 % and were ‘going off the beaten track: going to places where tourists do not go’. Only 2 % indicated that ‘I am a backpacker’. 2 % of the respondents said they ‘organized the trip themselves and nothing was really planned’, while 2 % called themselves ‘I’m a traveler’. Another 2 % said that they ‘don’t have money to spend on tourist activities’ and 2 % said that they were visiting friends, a family or a partner.

Table 11: Perception of the self (N=202)

	Label	Percentage
Do you see yourself different from a ' Tourist '?	Yes	66
How?	No	34
Volunteering		10
I do not like ' Touristy' things		11
I am a backpacker		2
Student		11
I am a traveler		2
Taking part in the real life of the local people		30
Do not have money to spend on ' touristy ' activities		2
Staying for a longer period of time		15
Work		5
I am South African		6
I organized the trip myself and nothing is usually planned		2
Visiting family, friends or boyfriend		2
Going off the beaten track: going to places where tourist don't go		3

*Rounded off to the nearest whole number

From these answers it seems that most of the respondents have an ‘anti-tourist’ attitude. Sorensen (2003) has also concluded that most backpackers maintain the disassociation from mainstream tourists. It seems that backpackers position themselves away from typical conventional tourism by preserving a division of a backpacker as ‘us’ and the tourist as ‘other’.

However, one can argue that this idea of the backpackers being anti-tourist is ideology-based and difficult to prove in real practice, since there are so many overlaps. This may be because they seem to follow the conventional ways of tourism at times and the way the tourism system is constructed makes it difficult for them to practice 'backpacking'. Welk (2004) found it difficult to draw the line between backpacking and other forms of tourism, since backpacking has become a sophisticated phenomenon.

5.7 Travel experience

Respondents were asked how the trip changed their lives and their way of thinking and if the respondents had answered yes they were asked to explain how. Table 12 shows that most of the respondents, 62 %, indicated that the trip changed their life and way of thinking and 38 % indicated that the trip did not change their life or way of thinking. Most of the respondents remarked that after the trip they felt different in many ways that developed their self-character and that they had become self-motivated and independent after the trip 29%. Some of the respondents indicated that when they went back to their home country after the trip, they will have an 'open mind about many things as the trip had exposed them to a new life experience' 27 %. Other respondents stated that the trip made them to 'appreciate their life and the things that they have back home' (13 %). Some 11 % of the respondents said the trip changed their views on how they see the world and how they see themselves, 8. % they had new impressions and thoughts, 7 % indicated that the trip made them feel less stressed and experienced a slower pace of life than before and were spiritually satisfied. Some of the respondents said they had 'learnt the difference between the developed and the developing countries and were forced to confront Western nation's hegemony', this was 6 % of the respondents.

Backpacker motivation to travel is very different. Most of them seem to want to gain a different kind of life experience and they always have attached some meaning assigned to their travel. Some are motivated by the self, as one of the backpackers interviewed remarked:

'I travel to find myself, who I am and what I like and to know where I'm going in life and I study life through travel' (Backpacker 2, 2012)

Another similarly said:

'Travelling is a medium for finding the self' (Backpacker 3, 2012)

'I travel therefore I am, you know you are the world yourself from personal experiences'
(Backpacker 3, 2012)

The distinction between different experiences at home and tourist experiences while backpacking are used to determine the idea of a self-changed person by backpackers. This might be the reason why they feel that backpacking is a life-changing experience. In this instance, it is clear that the backpacking experience is associated with the rite of passage. The rite of passage model reflects on the separation from time from the home community for a while and re-entry back to the home community with a new status.

Table 12: Travel experience (N=202)

	label	%
Has this trip changed your life and way of thinking?	Yes	62
	No	38
Personal development, self-motivated, independence		29
learning the difference between the developed and developing countries, forced to confront western nation hegemony		6
open mind or expose myself to new life experiences		27
Appreciating my life and the thing i have back at home		13
awareness: change of views on how i see the world and how see myself, new impressions and thoughts		11
Gained greater understanding of views on how i see the world and how see myself, new impressions and thoughts		8
Less stress and slower pace of life and spiritually satisfying		7

*Rounded off to the nearest whole number

5.8 Institutionalisation and non-institutionalisation of backpacker tourism in S.A

The notion of institutionalisation and non-institutionalisation of backpackers resurfaces again as the debate about whether backpackers are a unique form of tourism or blend experiences with mainstream tourism. In looking at the ways to distinguish backpacker tourism from mainstream tourism, one has to look at the differences in travel motivation of both the backpacker and mainstream traveller. However, one can still argue that backpackers are not only institutionalised by being part of mainstream tourism but are still institutionalised within themselves through their

styles. Backpacker trails or routes, transport systems and the idea of being confined in an enclave are all indicative of this.

5.8.1 Backpacker trails

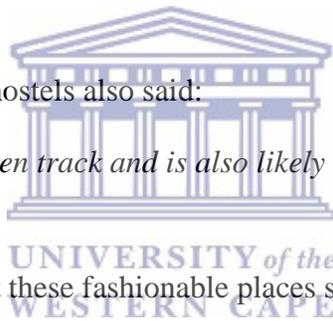
Backpacker trails involve the view that backpackers follow the same paths as other tourists who have visited before. The backpacker is motivated to go ‘off the beaten track’ in order to have authentic experiences. The ‘off beaten track’ experience involves travelling to primitive areas. One of the backpackers commented that:

‘I am an improved traveller who likes to discover new things and to go out of the beaten path, going to local remote areas.’ (Backpacker 1, 2012)

It seems that it is usually the second time that the backpacker tends to break away more from the typical routine of backpacking routes, by travelling to places like the Free State and Lesotho so as to avoid the commercial routes.

However, the owner of one of the hostels also said:

‘The backpacker can go to the beaten track and is also likely to go off the beaten track as well’ (Hostel owner, 2012)



The fact that a backpacker can visit these fashionable places such as Coffee Bay, Port St Johns or Chintsa, the so called trendy routes are created by word of mouth, this makes backpackers better able to advise each other about where to go and what to do. Evidently, one of the backpackers in the Baz Bus was heard conversing with another backpacker and said:

‘Have you been to Jeffery’s Bay? You should go there, you will find the coolest waves to surf’ (Backpacker 2, 2012)

The structure of the main forms of the transport system also creates a sense of institutionalisation. For instance, the Baz Bus, can only reach out to a few out the way areas on its fixed route from Cape Town to Port Elizabeth-Durban and Johannesburg. There is little degree of freedom that is created by these structured tours.

5.8.2 The enclave

Backpacker enclaves are described as conventional tourism spaces and as ‘safe havens’ where travellers can retreat to in order to increase their level of control (Hottola, 2005). To some extent

backpacker scenes, such as hostels and destinations, do create a feeling of institutionalisation. Some of the observed destinations, such as Chintsa where the area is massed with both mainstream tourists and backpackers and where the local community is completely separated from the tourist become interesting places or destination. They help to create elite ‘white’ spaces that seem to create some luxury backpacking and similarly comfortable scenes just as the ones back home. For instance, some of the sophisticated hostels provide internet services or comfortable clean rooms. One of the interviewed backpackers mentioned:

‘I am not in the tourism system – it compresses life, I don’t feel like a tourist, I don’t book any hostels. I camp or live in the local houses’ (Backpacker 1, 2012)

Other noted places include Long Street in Cape Town, which is filled with backpacker hostels, clubs, restaurants, internet cafes, coffee shops and more. Coffee Bay is also a ‘backpacker ghetto’, where all the hostels are clustered into one space, creating a ‘touristic’ atmosphere and physical spaces that makes the backpacker feel at home. Experiencing ‘otherness’ is the starting point for many tourists, where the ‘other’ is seen as an opportunity to question, confirm and judge the ‘self’ (Binder 2004:96). These spaces also reinforce the notion of the ‘other’, where local people view backpackers as a commodity and backpackers view the locals as the ‘Other people’. However, the main objective of the study was to segment the backpacker tourism market in South Africa in order to ascertain if any significant sub-groups exist. The next section focuses on a motivation-based analysis of the factor analysis as a statistical technique that is employed in this research to provide additional insight on backpackers. Moreover, cluster analysis is also a statistical technique that used to ascertain the groups.

5.9 Motivation-based market segmentation

5.9.1 Factor analysis

Factor analysis involves the identification of hidden structures within a set of variables (Smith, 1995). Factor analysis is basically designed to determine whether one group is significantly different from another, but similar within itself (Pallant, 2011). It is important to understand that factor analysis is a general term and consists of a variety of techniques which include factor analysis and principal components analysis (Smith, 1995). However, both techniques are related to each other and are used interchangeably by researchers (Pallant, 2011). In this study principal components analysis is employed.

5.9.2 Analysis of the motive statements

There were 17 motive statements/variables that were used through factor analysis and were answered according to a Likert scale of 1 - 5, shown in Table 13. All 17 motive statements had a minimum value of 1, and a maximum value of 5 with comparatively high standard deviations.

The motivation statements with the highest mean included ‘to look for a different experience’ (4.24), ‘to see how life in other countries is’ (4.24), ‘to seek active and adventurous things to do’ (4.11), ‘Interact with locals and become part of their lives’ (3.78), ‘to see how different Africa is from Western countries’ (3.75). The lowest mean rating was ‘to find a job’ (1.49). This suggests that backpackers are experience-seeking individuals and less interested in working holidays.

Table 13: Motive Statements/ Variables used in Factor Analysis (N=202)

Variable	Min.	Max.	Mean	Std. Dev.
To find out who I am and what I like	1	5	3.24	1.285
To get away from home/parents	1	5	2.58	1.348
To do things by myself, be on my own and refresh my mind	1	5	3.82	1.120
To distance myself from my job	1	5	2.62	1.401
To look for a different experience	1	5	4.24	1.012
To see how life in other countries is	1	5	4.24	1.081
To see how different Africa is from Western countries	1	5	3.75	1.304
Interact with locals and become part of their life	1	5	3.78	1.205
To give back to the community and give back to the poor	1	5	3.28	1.209
To hang out with friends	1	5	2.98	1.323
To seek active, adventurous and exciting things to do	1	5	4.11	.999
To have an easy time with no stress	1	5	3.68	1.244
To experience a slower pace of life	1	5	3.28	1.197
To improve my physical health and wellness	1	5	2.77	1.281
Take part in religious and spiritual activities	1	5	2.08	1.234
To study and learn something new	1	5	3.60	1.388
To find a job	1	5	1.49	1.072

5.9.3 Identified factors

Factor analysis was conducted by using the 17 motivation statements and extracted factors using the varimax rotated matrix as an extraction method. Each of the factors is named, based on the variables that have the highest loadings (refer to Appendix 2).

Table 14: Eigenvalues (N=202)

Component	Initial Eigenvalues		
	Total	% of Variance	Cumulative %
1	4.456	26.210	26.210
2	2.129	12.523	38.734
3	1.745	10.265	48.999
4	1.215	7.145	56.144
5	1.043	6.135	62.280

Eigenvalues were used to determine which factors are worth keeping for further analysis. As indicated in Table 14, only five factors were identified with eigenvalues that are greater than 1.0, and were thus retained.



Factor 1: Interaction with locals/ Self-development

Factor 1 is comprised of statements that are related to learning how to enhance knowledge of the self and also learning about the local people and their ways of life. The motives and the loadings include ‘To give back to the community and to give back to the poor’ (0.764), ‘Interaction with the locals and become part of their lives’ (0.711), ‘To study and learn something new’ (0.581), ‘To find out who I am and what I like’ (0.570) and ‘To do things by myself, be on my own and refresh my mind’ (0.507). These motives fit together because they evaluate the extent to which self-development and interacting with locals are important motives to travel to South Africa.

Factor 2: Exploring

Backpackers are primarily in search of new and exciting experiences. Factor 2 includes statements that are related to experience and exploring different things in a different country. The motive statements and loadings of Factor 2 include ‘To experience how life in other countries is’

(0.817), 'To look for a different experiences' (0.745) and 'To see how different Africa is from Western countries' (0.697).

Factor 3: Escapism and Relaxation

The statements in Factor 3 are related to the idea of escape and getting away to relax. This is motivated by the avoidance of life responsibilities from their home country. The motive statements and loadings on Factor 3 include 'To have an easy time with no stress' (0.811), 'To experience a slower pace of life' (0.811). Other motive statements and loading for this factor included 'To improve my physical health and wellness' (0.541) and 'To distance myself from my job' (0.501).

Factor 4: Job and Spiritual seekers

In Factor 4 the motive statements with the highest loading is 'To find a job' (0.794) and statements with the lowest loading is 'To take part in religious and spiritual activities' (0.612).

Factor 5: Socializing

In Factor 5 it is noted that backpackers always seek to do exciting, adventurous things and are also motivated to meet fellow backpackers and share life experiences. Factor 5 is comprised of the following motive statements and starting with ones higher loadings 'To hang out with friends' (0.848), 'To get away from home/parents' (0.605) and also 'To seek active, adventurous and exciting things to do' (0.512).

5.10 Cluster analysis

The next step is to sum up the factor scores. Factor scores are basically measures of similarity between similar groups of people and segments that can be defined by identifying individuals with similar factor scores through cluster analysis (Smith, 1995). Cluster analysis is a statistical technique used for classifying respondents into mutually exclusive groups (Frochot & Morrison 2001). A good cluster analysis should reveal high within-cluster homogeneity as well as high between-cluster heterogeneity.

5.10.1 Interpretation of cluster analysis

In this study the hierarchical cluster analysis procedure, Ward's Method, was employed for finding the homogeneous groups of respondents. There were 17 clustering variables that were all used to form the clusters. Four possible cluster solutions that were produced and one of these was selected as the most meaningful (Table 15). The 4-cluster solution that was chosen as the best solution and is used for further analysis in the study. It produced the most balanced cluster solution (Table 16).

Table 15: The 3-5 cluster solution

Cluster	No. of respondents: 3 Cluster solution	No. of respondents: 3 Cluster solution	No. of respondents: 5 Cluster solution
1	104	59	59
2	63	45	28
3	23	63	63
4		23	17
5			23
	N = 190	N = 190	N = 190

Table 16: The 4 cluster solution

Cluster	No. of respondents	% of respondents
1	59	31.1
2	45	23.7
3	63	33.2
4	23	12.1
	N = 190	100%

5.10.2 Identification of the clusters

The final step of cluster analysis is the interpretation of the clusters that is done by determining the cluster variable average values of all objects in a particular cluster (Mooi & Sarstedt, 2011). This exhibits whether the segments are conceptually distinguishable and that clusters that have significantly different means in variables are distinguishable. One way-ANOVA was used to assess how clusters are distinct. Simultaneously, the Tukey post-hoc test is used to decide where the difference lies. Based on the patterns of mean importance ratings illustrated in Table 17 all four clusters are named.

Table 17: Comparison of Mean Importance (N=202)

	Cluster 1	Cluster 2	Cluster 3	Cluster 4
Motivation Statements	Mean	Mean	Mean	Mean
To find out who I am and what I like	4.03	3.82	2.43	2.26
To get away from home/parents	2.31	3.22	2.75	1.74
To do things by myself, be on my own and refresh my mind	4.19	4.22	3.51	2.61
To distance myself from my job	2.03	3.56	2.83	1.65
To look for a different experience	4.36	4.69	4.46	2.43
To see how life in other countries is	4.63	4.60	4.30	2.43
To see how different Africa is from Western Countries	4.24	4.29	3.48	2.26
Interact with locals and become part of their life	4.32	4.18	3.33	2.70
To give back to the community and give back to the poor	4.08	3.82	2.52	2.30
To hang out with friends	3.00	3.56	2.73	2.48
To seek active, adventurous and exciting things to do	4.15	4.62	4.00	3.22
To have an easy time with no stress	3.03	4.53	4.11	2.35
To experience a slower pace of life	2.85	4.31	3.37	2.09
To improve my physical health and wellness	2.58	3.58	2.60	2.04
Take part in religious and spiritual activities	2.14	2.76	1.51	2.09
To study and learn something new	4.37	3.53	3.33	2.52
To find a job	1.22	1.69	1.33	2.22

Cluster 1: Self-developers/ Learners (N=59)

Cluster 1 has been labeled Self-Developers/ Learners because they rated high in ‘seeing how life in other countries is’ (4.63), ‘Study and learn something new’ (4.37), ‘to look for a different experience’ is also rated high in this cluster, also ‘Interacting with locals and become part of their lives’ (4.32) and ‘To see how different Africa is from Western countries’ (4.25). Backpackers in this segment are curious to learn about themselves and discovering themselves through travel and by meeting other local people or other fellow backpackers with whom they

interact. It seems they are more interested in learning about the culture of the country they are visiting and seeing how different it is to their own culture as a way of learning more about themselves. Additionally, backpackers engage with relationships between the self and host community in their search for meaning, which will eventually a way of giving the individual a sense of ‘opening up’ or being open minded (Matthews, 2008). This sense of being open minded is created by adapting and understanding the host community’s way of life in order to gain personal growth.

Cluster 2: Experience Seekers (N=45)

Cluster 2 can be identified as Experience Seekers because it reflects a higher importance in ‘Looking for a different experience’ (4.69), ‘To seek active, adventurous and exciting things to do’ (4.62), ‘To see how life in other countries is’ (4.60) the secondary motivations for this cluster also include ‘ To have an easy life with no stress’ (4.53). Generally speaking, backpackers have a hunger for new experiences for that reason backpackers in this segment are eager to gain a unique experience through travel and to experience things that they have not experienced anywhere else.

Backpackers are primarily in search for new and exciting experiences and to do as many activities as possible in order for them to tell a story about their unique trips. This agrees with Richards & Wilson (2004b) who have noted that backpackers participate in different activities than other travellers in the expectation that they will gain a sense of ‘once in a lifetime’ experience from their trips, necessitating them to take part in every available experiential activity.

Cluster 3: Escapers/Independence (N=63)

The third cluster has been categorized as Escapers/Independence because it had one of the highest ratings on ‘To have an easy time with no stress’ (4.11), ‘To do things by myself, be on my own and refresh my mind’ (3.51), ‘To experience a slower pace of life’ (3.37) and also ‘To seek active, adventurous and exciting things to do’ (4.00). Generally in tourism studies, escape is one of the dominant themes in travel motivation. The increase in globalisation and the dissatisfaction with the life back home has motivated people to travel to other countries, particularly Eastern European and African countries, in order to experience a feeling of relaxation and give themselves as a sense of freedom by escaping from boring daily life.

People tend to feel the need to escape from boring relationships, from many social expectations or responsibilities or inhibitions or their daily jobs (Ateljevic & Doorne, 2001). This segment reflects the higher importance that is placed on getting away from home and wanting to feel independent and free through travel.

Cluster 4: Adventurers/Social seekers (N=23)

Cluster 4 can be described as Adventures and Social seekers because it consists of the highest ratings in 'Seeking active, adventurous and exciting things to do' (3.22), 'To interact with locals and become part of their lives' (2.70). Other motivations that are also highly rated in this cluster include 'To do things by myself be on my own and refresh my mind' (2.61), 'To study and learn something new' (2.52) and also 'To hang out with friends' (2.48). Social interaction is therefore an important motivator for backpackers. Backpackers are known as individuals who are always interested in forming relationships, particularly in meeting local people and other backpackers in searching for authentic experiences. Backpackers are individuals who search for adventurous activities and often take part in extreme adrenalin activities.

5.11 Demographic comparison of clusters

A cross-tabulation was performed in order to determine any association or differences in the demographic characteristics amongst clusters (Table 18).

5.11.1 Nationality

The cross-tabulation performed between nationality and the clusters depicted that the Self-developers were highly represented by the Americans 52 %. The Experience seekers and Adventures/Social seekers were not highly associated with any of the nationalities and were therefore difficult to draw any significant conclusions on them. Escapers/Independence seekers were more likely to be Asians 66 %.

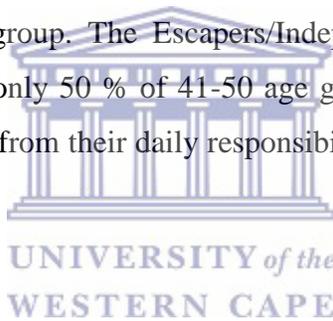
5.11.2 Gender

Overall, there were no significant differences across all four segments with regards to gender. The Self-developers/Learners within gender had only 26 % representing males and 36 % representing of females. It is clear that males were not eager to learn about themselves than

females. The experience seekers of the respondents had 24 % males and 22 % females. The Escapers/Independence of respondents had 34 % representing males and 32 % females. Both the Experience Seekers and Escapers/Independence did not show any differences within their gender groups. More males were represented in Adventure and Social seekers (16 %) compared to 10 % females in this cluster. It is again clear that males are more likely to participate in extreme activities than females.

5.11.3 Age

The under 20 age group was more dominant in the Self-developers/Learners at 64 % of the cluster. This may be associated with the fact they, being the youngest age group, are much more eager to learn about themselves and to know more about the world around them through travel than the other age groups. The Experience Seekers also represented a high number within the 21-30 age group, of 76 %, although the Escapers/Independence had 31 % as the highest representation of the 21-30 age group. The Escapers/Independence group were also highest within the 31-40, with 65 % and only 50 % of 41-50 age group. It becomes apparent that this group may be motivated to escape from their daily responsibilities such as work in order to relax and free their minds.



5.11.4 Education

The cross-tabulation performed between the level of education and the clusters showed that the Self-developers/Learners were dominated by individuals who have 'started university but not yet finished' with 67 %. The experience seekers were not really dominant in any of the four clusters. The cluster with the highest number of individuals who have obtained Diploma/Degree were the Escapers/Independent with 38 % and the highest in the Postgraduate level was 39 %.

Table 18: Comparison of clusters across demographic characteristics (N=202)

Label		Cluster 1: Self-Developers/Learners (N=59)	Cluster 2: Experience Seekers (N=45)	Cluster 3: Escapers /Independence (N=63)	Cluster 4: Adventurers/ Social seekers (N=23)
Nationality	Africa	0.0%	35%	41%	24%
	Asia	0.0%	11%	67%	23%
	Australia	25%	25%	50%	0%
	America	52%	27%	16%	5%
	Europe	30%	21%	36%	13%
Gender	Male	26%	24%	34%	16%
	Female	36%	22%	32%	10%
Age	Under 20	64%	14%	23%	0%
	21-30	30%	24%	31%	15%
	31-40	0%	29%	65%	6%
	41-50	0%	25%	50%	25%
	51-60	33%	33%	33%	0%
	60+	50%	50%	0%	0%
Education	No formal Education	0%	100%	0%	0%
	Started university but not yet completed	47%	17%	25%	12%
	High School	50%	22%	28%	0%
	Diploma/Degree	20%	32%	38%	11%
	Postgraduate	26%	13%	39%	22%

5.12 Comparison of clusters and activities

The comparison of clusters and activities would be able to determine which activity each cluster is interested in. As indicated in Table 19 Chi square was used to ascertain if there were any statistical differences. For example, if the P-value is greater than 5 %, the observed difference is seen as not statistically significant. It was noted that the P- value of ‘wine tours’ (0.04) and ‘volunteer work’ (0.00) was lower than 5 % and therefore the observed difference was statistically significant.

However, for cluster 1, over half the activities were rated as high, particularly in the activities such as ‘volunteer work’ with 54 %, ‘festivals’ with 42 %, ‘wine tours’ with 41 %, ‘museums

and historical sites' with 36 %. This means that the Self-developers/Learners are the type of individuals that are interested in gaining knowledge about the country they are visiting and at the same time they want to contribute to the welfare of the host community doing volunteer work. Cluster 2 is highly rated in 'walking' as an activity than any other clusters. This means that The Experience seekers are interested experiencing the life in the surroundings environment more intimately and to be more interactive with the local people rather than being confined in a tour bus. In cluster 3, the highest rated activities more than any other cluster, included 'visiting national parks' with 38 %, followed by 'game viewing sites' with 34 % and beaches with 32 %. This means that the Escapers/Independence group are individuals who seek passive activities that do not require much effort, such as relaxing at the beach. It seems that cluster 4 did not have any highly rated activities as compared to the other clusters.

Table 19: Clusters and activities comparison (N=202)

Activities	Cluster 1	Cluster 2	Cluster 3	Cluster 4	Chi-square P-value	Conclusion
	Yes	Yes	Yes	Yes		
Clubbing& Partying	35%	22%	31%	12%	3.161 0.37	Not Significant
Museums& Historical sites	36%	23.3%	28.2%	13%	3.479 0.33	Not Significant
Visiting National Parks	28%	21%	38%	13%	5.508 0.39	Not Significant
Visiting natural sites	40%	25%	24%	12%	7.092 0.70	Not Significant
Township tour	33%	25%	28%	14%	4.696 0.195	Not Significant
Wine tour	41%	24%	20%	16%	13.300 0.04	Significant
Game Viewing sites	30%	27%	34%	9%	1.690 0.64	Not Significant
Beaches	29%	26%	32%	13%	1.058 0.79	Not Significant
Shark diving	33%	24%	32%	11%	2.923 0.40	Not Significant
Walking	32%	34%	28%	6%	5.103 0.16	Not Significant
Festivals	42%	24%	27%	7%	5.191 0.16	Not Significant
Volunteer work	54%	24%	12%	10%	33.514 0.00	Significant
Hiking	34%	23%	34%	9%	3.646 0.30	Not Significant
Other	29%	21%	36%	14%	.329 0.95	Not Significant

5.13 Summary

As this study aimed to segment the backpacker tourism market in order to determine whether any sub-groups exist which has been achieved by ascertaining four segments which included Self-developers/Learners, Experience seekers, Escapers/Independence and Adventures/Social seekers. This was achieved by the distribution of 202 surveys in the Baz bus and at the different hostels in three provinces which are the Western Cape, Eastern Cape and Kwa-Zulu Natal. The surveys comprised of three parts which helped to achieve the research objectives. These parts included a focus on the demographic section, trip related information and the motivation statements section. The data for the surveys was captured using Microsoft Excel and later analysed using SPSS (Statistical Programme for Social Sciences). In terms of data analysis a clustering segmentation method was implemented that helped profile and identify the four segments. A cluster analysis was performed using all seventeen motive statements. As illustrated earlier that a three and five cluster solution was conducted but the four cluster solution was chosen as it produced a better solution. In interpreting the clusters the one way-ANOVA was used to determine the distinction of the clusters and to depict the mean importance ratings of the seventeen motive statements for each of the clusters. Additionally a cross tabulation was conducted which is a demographic comparison of clusters that is used to determine if there are any existing associations or difference in demographic characteristics among the identified clusters. The results of the cross tabulation presented no major association between the clusters and demographics. A cross tabulation was also done to compare the activities and clusters.

CHAPTER 6

CONCLUSION AND RECOMMENDATIONS

6.1 Introduction

In this chapter a summary of the key research findings is presented. It also provides a brief conclusion that outlines ways in which the identified segments can contribute positively to South Africa's backpacker tourism industry and, based on findings produced by the data, gives a number of recommendations that can possibly enhance the backpacker niche market in South Africa.

6.2 Key findings

6.2.1 Research in backpacker tourism in South Africa

South Africa exists in an extremely competitive global market of backpacker tourism with countries such as Australia and New Zealand viewed as highly advanced in this market. In assessing the available literature, it is clear that the South African backpacker tourism industry is still a growing niche market.

The research that has been done on South Africa backpacking seems to focus more on the development aspects and little has been done on backpacker motivation and segmentation. It is mostly exploratory. The existing academic publications on backpacker tourism in South Africa includes the work by Visser (2004) which focuses on the developmental impact of backpacker tourism in South Africa, highlighting why backpacker tourism has great potential for local development initiatives. Other publications by Visser and Barker (2004b) provide insights on the development and functioning of the South Africa budget tourism sector specific in the backpacker industry. Rogerson (2007) has centered his research more on developmental studies of the industry and analyses some of the challenges of developing backpacker tourism in South Africa. Other research that has focused on backpacker motivation was conducted by Niggel & Benson (2008). There is research that has been done by agencies, including the study by the DTI

(2007) and the Backpacking and Kamilla SA Sport and Tourism Consultancy & City of Cape Town (2009).

It is evident from the existing literature that there is a huge gap between South African research studies and international research on this topic. The international literature is vast in the sense that it is concerned with a much wider range of themes and concepts such as activities, identity formation, means of transport, experiences of backpackers and motivation of backpackers. It is also theory based research rather than descriptive studies as the South African research studies are.

6.2.2 Understanding backpacker demographics

- Part of this thesis is to provide an analysis of the demographic profiles of backpackers in South Africa:
- The findings of this research reveal the major sources of backpackers in South Africa who mostly originate from Europe and the United States of America.
- They seem to be low representative groups of local individuals who are supposed to be another source of the market. This could mean there is a lack of domestic backpackers marketing strategy to capture local people. It is clear that the domestic backpacker market is outweighed by the international backpacker market. The South African backpacker industry is highly dependent on the international market for sustainability of the industry.
- Female participation was slightly higher than that of the males. This means that there is potential growth for a female segment and that women are increasingly travelling as backpackers to South Africa.
- Since women are becoming an important factor in backpacker tourism, the industry has the potential to develop and provide improved products for this segment.
- The popular age group of backpackers was within the 21-30 age group. This indicates that backpackers who are travelling a lot to South Africa are predominantly young people. However there was low representation of the 40 and older group, it appears that the older group was not strongly represented in the study. These are clear categories of the industry to

be looked at. This confirms that backpacking is an important and growing niche market that is predominantly made up by young individuals.

- The minor representation of older backpacker indicates that the market of older backpackers does also exist and has potential for further growth.
- The results suggest that backpackers are well-educated individuals, although not all of them are interested in gaining knowledge through higher institutions of learning.

6.3.3 Trip-related information

- The most represented duration in the study was 1-6 months in South Africa. However, 1-6 months is a relatively long time and this indicates that most backpackers have lengthy holidays in South Africa and cannot be ignored as a sector. This provides new opportunities for the local hostels and other local services industries, including transport.
- Backpackers use different sources of information for their trips. However, the majority rely on friends and families for information sources about the place of destination, which was followed by the internet sources. This means that word of mouth is very relevant for destination marketing.
- Evidence exist that most of the respondents planned their own trips independently. This is because backpackers tend to avoid the use of travel agents or any formal bookings. Some do not plan their trips, but simply come because they avoid touristic traditions and travelling in conventional ways like having packaged tours. They do not plan their trips due to their wish to follow flexible movements.
- Overall, a great number of respondents made use of the Baz Bus, of which one can argue that the Baz Bus is a structured transport system aimed at backpackers.
- Seemingly, backpackers have different reasons for their accommodation preferences. Backpacker hostels are generally known to be cheaper forms of accommodation. Hostels are not only a form of accommodation, but also becoming places where they meet fellow travellers and local people. This makes the hostel accommodation a growing social place.

- The majority of respondents indicated that their main reason to travel to South Africa was to see South Africa's natural environment followed by the South Africa's diverse culture. This means the natural environment and local culture are an important industry that can have major influences on places or destination choice.
- In searching for new and exciting experiences, backpackers are involved in a wide range of activities. The of the most popular activities identified included going to the beach, clubbing and partying, visiting national parks, hiking and visiting natural sites.
- The changing identities of backpackers involve the construction of perceptions of the self, how backpackers as people see themselves from the rest of other travellers, especially those in their countries of origin. Backpackers see travel as a gateway method to form new identities. They seem to be obsessed with ideas of radical changes in their life-styles from back home and they use travel as a means to implement that radical change in their character formation. Surprisingly, some backpackers would rather not be labeled as 'backpackers', due to the commercialization of backpacker tourism and they rather perceive themselves as just travellers.
- Most respondents indicated that their trips changed their lives and ways of thinking. However, most respondents remarked that their trips would provide them with exhilarating experiences that would develop the self-character, and thereafter they feel self-motivated and independent to make individual life choices. Backpackers' experiences are also modeled as rite-of-passage transitional and transformational processes.

6.3.4 Motivation-based market segmentation

- Motivation was the appropriate framework for segmenting backpackers on the basis of their similarities and differences.
- In this thesis motivation was used as the theoretical basis because in this study travel motives are recognised as a means of segmenting the backpacker market.
- In this case segmentation has provided additional knowledge on the backpacker market in the South African context. This knowledge, however, has the potential to contribute to the promotion of new backpacker offerings and also provide better positioning of backpacker

segments within the tourism industry, particularly given the increasing international competition from countries such as Australia and New Zealand which seem to have well-established markets for the backpacker segments.

- However, four segments were discovered through cluster analysis, which was useful in profiling and identifying these segments.
- Identified Groups/Segments:
 - The Self-developers/Learners: concerned about knowing the self and motivated to learn about other people's ways of thinking.
 - The Experience Seeker: interested in taking part in exciting activities
 - The Escapers/Independence: motivated to get away from home wanting to feel a sense of freedom and independence through travel.
 - The Adventurers/Social Seekers: interested in taking part in extreme activities and motivated to form relationships and meeting locals.
- The participation in various activities was expected to vary from each cluster but only showed variance in wine tourism and volunteer work activities.
- At the same time, these segments do illustrate an increase in the heterogeneity of backpacker tourism and it is important that the heterogeneity must be intensely recognised by the tourism industry in South Africa in order meet the needs of backpackers.
- In terms of push factors, it is noted in the study that some of the key motivation that lead the traveller to making a decision to take upon a holiday include the desire to develop the self through travel experiences, to explore other destinations, to interact with the local people and also to escape from places of origin that seem to suffocate them, hence the search for freedom, independence and merely freeing the mind. However, it is important for the market researcher to note these push factors in order to cater for them all so that the needs of the traveller can be satisfied by the place of destination.

6.3.5 Institutionalisation of backpacker tourism

Backpackers are not only institutionalised by being part of mainstream tourism but they are also institutionalised within themselves through their styles. Their noted features that contribute to the institutionalisation of this industry include backpacker trails and the idea of the backpacker enclave. It seems that infrastructure and paths of backpackers maintain the notion of institutionalisation. For instance, backpackers following popular routes in organised transport or being confined in cosmopolitan backpacker spaces such as Long Street in Cape Town challenge this structural outlook of backpacking.

6.4 Segments/Typologies

The different identified segments would possibly provide the tourism marketer with a clear understanding about the types of backpackers we have in order to buy into their products. Typologies may also assist in providing a clearer target market. For example, the Adventures/Social Seekers type is likely to seek a vibrant atmosphere and this could possibly mean that some of them would choose hostels on Long Street as this is one of the areas where their needs of meeting new people, hang out with friends and, at the same time, have fun and new experiences. Hostels are also relevant to the Social Seeker segment because their main motive is to socialise and form relationships. Therefore, the hostel may play an important role in meeting the needs of the social seekers, where they can have the opportunity of meeting fellow travellers and locals that work in the hostels. However, simultaneously, the market would know that the case would be different for the Escapers/Independence type as they are motivated by the idea to seek a more tranquil and relaxed atmosphere. If that was the case, then a place such as Long Street would not be ideal to meet their needs. This could mean that they would most probably prefer hostels outside the City Bowl, where they would feel a sense of distance between them and the busy life of the City and at the same time receive a sense of freedom and independence from that space.

Tourist typologies are also associated with the institutionalised and non-institutionalised travellers. This is a situation where one can ask the question of whether backpacking is still a unique form of tourism or it is just another form of mass tourism. Can there really be a clear distinction between backpacker tourism and mass tourism? That remains a fundamental question.

6.5 Recommendations

- Future research on the South African backpacker industry should recognise the social order of backpacking such as the changing identities of backpackers, the activities that they participate in, the freedom that they seek, authentic or travel experiences that they desire, social interactions that they look for when visiting South Africa. All these social orders are important elements in shaping the backpacking industry as a whole.
- Development of more academic research on backpacker tourism in South Africa is needed to understand the different dynamics of the market.
- South Africa needs to develop an attractive destination appeal to all backpackers in the whole world. This means that it needs a place of destination image that is specific for backpackers the world over.
- Provide add-on trip products for each segment such as volunteer tourism or informative wine tours for the Self-developers/Learners or shark cage diving for the Adventure seekers.
- Increase domestic market sources by create awareness to South Africans about backpacker tourism, increase promotional efforts among South Africans and also strengthen and sustain the existing international market source.
- South Africa does have the potential of attracting the older group of backpackers for the reason that it does exist. Increase promotion to attract this group is needed.

6.6 Conclusion

One of the ways of augmenting the backpacking industry in South Africa is to recognise and understand what each segment is about, how the needs and wants of the segment could be satisfied by the industry and what each segment can provide for the tourism industry.

The South African backpacker market indicates that respondents differ significantly in terms of their travel motivation. However, the distinction can provide an opportunity for South Africa to develop targeted products. It is apparent that backpacker tourism is one of the interesting niche markets in tourism for the South African growing population to match international rankings as an attractive backpacking place or destination. It is evident, by the range and numbers of

facilities that are currently being offered particularly in the accommodation industry that there is still a long way to go. This also means that backpacker tourism is not totally ignored.

South Africa has to recognise the potential of these market segments as they might have a positive contribution towards the growth of the backpackers industry. The segments can enable South Africa to keep up with the current trends of improving backpacking marketing. At the same time, the identification of these four segments can provide all inclusive products that will meet the needs of the diverse backpacker market. The segments can be useful for South Africa to develop innovative products and have quality standards that meet the needs of the clients in this very competitive market.



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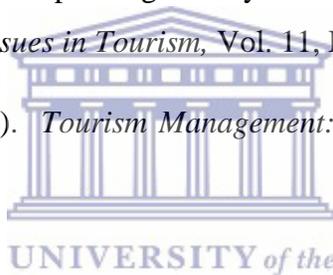
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LIST OF INTERVIEWS

Backpacker 1 (March 2012). Coffee Shack Hostel, Coffee Bay.

Backpacker 2 (March 2012). Coffee Shack, Coffee Bay.

Backpacker 3 (March 2012). Lungile Backpacker Hostel, Port Elizabeth.

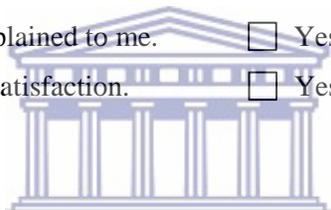
APPENDIX 1: QUESTIONNAIRE



Description of Research:

This study is part of an MA degree in Geography and Environmental Studies at the University of the Western Cape. This study sets out to explore the motivations, interests and activity patterns of backpackers in South Africa. All answers will be treated as confidential.

I agree to participate in this study.	<input type="checkbox"/> Yes	<input type="checkbox"/> No (Please tick)
I understand that my participation is voluntary.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
I have had the purpose of the study explained to me.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Questions have been answered to my satisfaction.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Signature		


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1. Have you visited South Africa before?

Yes No

2. Where did you obtain prior information about travelling in South Africa?

Internet Friends/family Brochures/pamphlet Travel
guidebook Newspaper/magazines Agent
 Other (specify) _____

3. What is the duration of your visit?

Less than a month 1-6 months
 1 year and more More than 6 months, but less than a year

4. Who are you travelling with?

- Alone Partner
 Friend/s Other: (specify) _____
 Family

5. How did you plan your trip?

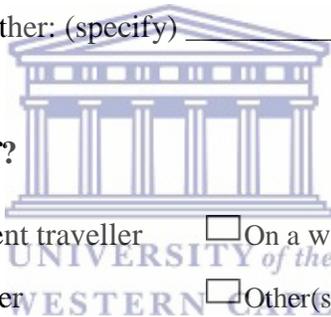
- Used a travel Agent Did not plan the trip at all
 Planned it myself Used a guidebook (which?) _____
 Used the Internet Other: (specify) _____

6. What is your main reason for visiting South Africa?

- Visiting Family Visiting friends Leisure
 Volunteer work To do paid work Study
 Internship Other: (specify) _____

7. How would you define yourself?

- Tourist Independent traveller On a working Holiday
 Student traveller Backpacker Other (specify) _____



8. Which activities have you participated in, or do you intend to participate in, while in South Africa?

- Clubbing & Partying Museums & Historical sites Visiting National Parks
 Visiting Rural Villages Visiting natural Township Tour
 Wine Tour Game viewing sites Beaches
 Shark diving Walking Festivals
 Volunteer work Hiking
 Other:(specify) _____

10. In your opinion did the activities that you have already participated in fulfil your desires/meet your expectations?

Yes No

If no, please explain why not?

.....

11. Which modes of transport have you used/ do you intend to use within South Africa?

Baz Bus Metered Taxi Rented car

Inter-city bus Mini-bus Bicycle

Other: (specify) _____

12. What type of accommodation are you using/do you intend to use?

Backpacker hostel Friends/Family Bed & Breakfast Guest house

Rented apartment Hotel

Camping Other: (specify) _____



13. Why did you choose this particular type of accommodation?

Close to city centre Easy access

Cheap Other: (specify) _____

14. Please rate the following reasons for travelling in South Africa according to their importance to you.

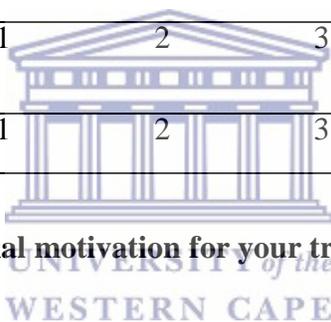
Reason:	Rating of each reason- 1: not at all important 2: Not important 3: neutral 4: important 5: very important				
To see South Africa's natural environment	1	2	3	4	5
To see South Africa's diverse cultures	1	2	3	4	5
To experience the good	1	2	3	4	5

weather					
To experience the music, dance and good food	1	2	3	4	5
To attain world knowledge/educate myself	1	2	3	4	5
To study new languages	1	2	3	4	5
It is cheap and affordable	1	2	3	4	5

15. Please rate the following statements according to their importance to you during this trip.

Motivation	Rating of each reason- 1: not at all important 2: Not important 3: neutral 4: important 5: very important				
To find out who I am and what I like.	1	2	3	4	5
To get away from parents/home	1	2	3	4	5
To do things by myself, be on my own and refresh my mind.	1	2	3	4	5
To distance myself from my job.	1	2	3	4	5
To look for a different experience.	1	2	3	4	5
To see how life in other countries is.	1	2	3	4	5
To see how different Africa is from Western countries.	1	2	3	4	5
To interact with the locals and become part of their life.	1	2	3	4	5
To 'give back' to the community, and contribute to the poor.	1	2	3	4	5

To hang out with friends in parties and clubs.	1	2	3	4	5
To seek active, adventurous and exciting things to do.	1	2	3	4	5
To experience activities I will never experience anywhere else.	1	2	3	4	5
To have an easy time with no stress.	1	2	3	4	5
To experience a slower pace of life.	1	2	3	4	5
To improve my physical health and wellness	1	2	3	4	5
To take part in religious and spiritual activities	1	2	3	4	5
To study and learn something new.	1	2	3	4	5
To find a paid job	1	2	3	4	5



16. Do you have any other personal motivation for your trip, not mentioned in Q14 above?

Yes No

If yes, please indicate.....

17. Has this trip changed your life and way of thinking?

Yes No

If yes, please explain how?

18. Do you see yourself different from a ‘tourist?’

Yes No

If yes, please explain how?

.....
.....

19. What was the best thing you experienced in South Africa?

.....
.....
.....



20. What was the worst thing you experienced in South Africa?

.....
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Personal information

21. Please state your gender

Male Female

22. Into which age group do you belong?

Under 20 21-30 31-40
 41-50 51-60 60+

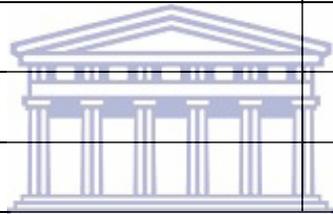
23. What is your country of origin?

24. What is your daily budget (in Rands per day) for this trip, excluding airfare to and from South Africa?

R per day

25. Please indicate what percentage of your daily budget is spent on the following.

Item	Expenditure (% of daily budget)
Accommodation	%
Food & Beverages	
Visiting tourist Attractions	
Activities/Entertainment	
Other: specify	



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26. What is the highest level of education achieved?

- | | |
|--|---|
| <input type="checkbox"/> No formal education | <input type="checkbox"/> Started university/college but not yet completed |
| <input type="checkbox"/> High School | <input type="checkbox"/> Diploma/ Degree |
| <input type="checkbox"/> Postgraduate | <input type="checkbox"/> Other: specify: _____ |

Thank you very much for participating in this survey

APPENDIX 2: ROTATED COMPONENT MATRIX

	Component				
	1	2	3	4	5
15giv	.764				
15loc	.711				
15stu	.581				
15fin	.570				
15ref	.507				
15lif		.817			
15loo		.745			
15afr	.424	.697			
15eas			.811		
15slo			.811		
15imp			.541	.467	
15dis		.414	.501		
15job				.794	
15rel	.433			.612	
15han					.848
15get					.605
15see	.439				.512