

Backpackers:
The Next Generation?

by

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Attestation of Authorship

“I hereby declare that this submission is my own work and that, to the best of my knowledge and belief, it contains no material previously published or written by another person (except where explicitly defined in the acknowledgements), nor material which to a substantial extent has been submitted for the award of any other degree or diploma of a university or other institution of higher learning.”

Anne Markward

Abstract

New Zealand has a well-established network of accommodations, transportation, and visitor activities developed specifically for backpackers. These tourists account for almost ten percent of the country's international visitor expenditure. To date, the majority of backpacker research has focussed on the traditional market segment of student and youth travellers, though a few quantitative studies have also researched the needs and preferences of older travellers using hostels and backpackers' accommodations. Though more than 50 percent of New Zealand's international visitors are over age 40, few currently stay at this type of accommodation.

Using New Zealand as a case study, this thesis explores, qualitatively, the perspectives of older backpackers: their self-perceptions, their travel motivations, their needs and expectations in accommodation. In addition, it examines the points of view of the owners of small, independent backpackers' accommodations to gain their perspectives on hosting a multi-generational clientele and on what the implications might be of expanding this market.

Key findings show that older travellers who use backpackers' accommodations technically meet all Pearce's (1990) original definitions of "backpacker" - they prefer budget accommodations, they are socially interactive, they travel independently and flexibly, they travel for longer holidays than do most, and they choose informal and participatory activities. However, these travellers reject the self-definition of "backpacker", an impasse that presents a lexical challenge to both scholars and tourism marketers. The final section addresses the impacts and implications of "backpacker" nomenclature on baby boomer travellers, academia, and the backpacker industry at large.

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Abbreviations

AU	Australia
BB	Baby boomer (in figures only)
BBH	Budget Backpackers Hostels, Ltd.
B, L, D	Breakfast, Lunch, Dinner (in tables only)
BP	Backpackers (in figures only)
DOC	Department of Conservation
FIT	Free independent traveller
MED	New Zealand Ministry of Economic Development
MOT	New Zealand Ministry of Tourism
NZ	New Zealand
NZTRI	New Zealand Tourism Research Institute, Auckland University of Technology (AUT)
SIT	Semi independent traveller
SME	Small and medium enterprise
STE	Small tourism enterprise
TRREC	Tourism Recreation Research & Education Centre, Lincoln University
UK	United Kingdom
US	United States
VFR	Visiting friends and relatives
YHA	Youth Hostel Association

1 Introduction

Since the mid-1990s, the tourism industry has become aware of the economic 'phenomenon' of backpacker tourism and the extent to which it contributes financially to both developed and developing countries (1995; Richards & Wilson, 2003; Scheyvens, 2002, 2006). In New Zealand, for example, backpackers contributed some \$642 million to the tourism economy in 2005, statistically similar per capita expenditures to other international tourists, though with a lower daily spend (Ministry of Tourism (MOT), 2005).

To date, most backpacker research has focussed on reviewing the experiences and choices in travel of the 18-29 year olds who constitute the bulk of the market. Pearce (2006) however, has called for the need to produce research with a wider scope, research that is both relevant and pragmatic. He suggests numerous new topics for consideration, including the relationship between backpacking and life span / life courses. Cohen (2003, p. 57) agrees, asking that future research move away from assuming that backpacking is a "homogenous phenomenon" and should instead review "its diverse manifestations, in terms of differences in age, gender, origins, and particular subcultures".

The growing presence of older backpackers within the market has been noted (Hecht & Martin, 2006; Scheyvens, 2006). "Older" is defined within the literature as backpackers over age 30. Several quantitative studies about hostels and backpackers' accommodations have recorded the preferences of older travellers (Cave, Thyne, & Ryan, 2007; Hecht & Martin, 2006; Thyne, Davies, & Nash, 2004). This thesis seeks to amplify the existing literature through a qualitative study of older backpackers' self-perceptions, motivations, needs and expectations during their travels in the well-developed backpacker destination of New Zealand.

Additional backpacker research in this country has focused primarily on the growth of the backpacking industry and its related suppliers (Ateljevic & Doorne, 2000b; Doorne, 1994; Vance, 2004). Newlands (2004) examined the

quantitative responses of backpackers in both large and small backpackers' facilities across the country. The New Zealand Tourism Research Institute (NZTRI) has undertaken ongoing studies reviewing the usage and perceptions of the Youth Hostel Association (YHA) by both members and non-members (Hyde, Buch, Tinh, Markward, & Milne, 2008; NZTRI, 2005; NZTRI, 2007). However, research that focuses solely on small, privately owned, backpackers' accommodations and their guests is lacking. Most of these businesses fall within New Zealand's definition of small tourism enterprises (STEs) with five or less full-time employees (Ministry of Economic Development (MED), 2007). For instance, BBH Ltd. (BBH: Budget Backpackers Hostels NZ), the largest private sector network, has over 370 member properties whose operations average less than 30 beds each. Page (Page, Forer, & Lawton, 1999) suggests that there is a paucity of research on STEs in this country. This thesis seeks to add to that limited body of knowledge by contributing some insights into small backpackers' accommodations' facilities, their services, and the people who use them.

Researcher context

Several scholars are calling for "greater levels of transparency in tourism research, with researchers being more open about their personal biography [*sic*] and their experiences in the field, and how these two interact and evolve over time" (Phillimore, 2004, p. 186). This is due to the notion that qualitative research is intrinsically and extrinsically influenced by the researcher(s) involved with data collection and analysis. Hall (2004, p. 153) suggests that academic research, including theses, should include a "value statement" declaring how one's personal experiences may have influenced the choice of topic, research collection and analysis.

My choice of thesis topic was affected by who I am and what I have experienced to date in my own life. I travelled as a hitch-hiker and hosteller in New Zealand and Australasia in the early 1980s, before "backpacking" was a much-used term. Hostels at that time were mostly cold and unwelcoming, with gender-segregated

dorms, lists of chores, and curfews. In re-reading journals from those years, I was obviously not warmed by either the hospitality or facilities on offer. After two years of adventures as a long-term budget traveller, I returned to the United States. I worked in tourism marketing for 24 years, creating and directing marketing for businesses ranging in annual sales from \$US 500 (in Ghana, Bolivia, and Belize) to \$US 150 million (for corporations in US national parks). I am particularly interested in helping small and medium sized entrepreneurs achieve sustainability. I came to New Zealand recently to study as a graduate student with an eye to migrating to and working fulltime in this country.

Upon returning to New Zealand, I stumbled upon a backpackers' accommodation one night when a town's motels were all full. I vaguely knew the term, but had no connection with it: I was no longer a young kid with a backpack, but rather a mature, independent traveller. I discovered that many backpackers' accommodations now offer private rooms (many with ensuites) in small homes and historic villas. They're friendly, they're in great locations, and they're extremely affordable. So why, I had to wonder, aren't many older travellers using them? I was intrigued, and gradually formulated the core research questions that this thesis seeks to address.

Research questions

Using New Zealand as a case study, this thesis aims to explore, qualitatively, the preferences and perceptions of older travellers who are currently using backpackers' accommodations, specifically focusing on the following research questions:

- What are their demo- and psychographics?
- What are their perceptions of self?
- What are their motivations for choosing these accommodations?
- What are their reactions to the term "backpacker" and its related lexicon of words?

- What are their specific needs and preferences in backpacker accommodations?
- What are their travel-related research and booking patterns?

And, subsequently,

- How is the industry responding to older travellers, vis à vis both facilities and marketing?

Defining “travel roles” and “touristic experiences”

To situate the research, academic and industry definitions of tourists and the ever-expanding combinations of travel styles and tourism products must first be explored. As will be discussed, nomenclature itself often disrupts communication both within and between academia and industry experts.

Academic definitions

Who is a tourist? Who is a backpacker? These two apparently simple questions have been discussed and debated for years by academics. Cohen, stating in 1974 that definitions for tourism created by international travel statistic models were too broad for sociological purposes, instead declared the “tourist” to be within the *genus proximus* (wider category) of “traveller”. He stated that the tourist is “a voluntary, temporary traveller, travelling in the expectation of pleasure from the novelty and change experienced on a relatively long and non-recurrent roundtrip” (Cohen, 2004c, p. 23). He sub-classified tourists into four travel roles: *organized mass tourists*, *individual mass tourists*, *explorers*, and *drifters*, positioning them along a continuum of risk aversion. *Organized mass tourists* travel in groups on pre-planned and pre-purchased trips with little or no input to daily decisions. *Individual mass tourists* pre-purchase elements of their trip (e.g., airfare, accommodations) but have flexibility in daily itinerary choices and travel without a group. *An explorer* tries to avoid the mass tourist routes but “nevertheless looks for comfortable accommodations and reliable means of transportation. ... He tries to associate with the people he visits...but still does

not wholly immerse himself in the host society” (Cohen, 2004b, p. 43). *Drifters* travel outside tourism’s infrastructure, eschewing comforts of institutionalized accommodation or transport for life with their hosts’ communities. As will be discussed further in the literature review, Cohen (1973) later sub-classified drifters into a similar continuum of risk, including at one end the organised *mass-drifters* and, at the other least institutionalised, *adventurers*.

In 1979, Cohen sought to reconcile the scholastic debate opened by Boorstin and MacCannell about tourists’ travel motivations and experiences. Boorstin had argued in 1964 that tourists seek only the “trivial, superficial pursuit of vicarious, contrived experiences” (cited in Cohen, 2004a, p. 67). Conversely, MacCannell, writing in 1976, believed that all tourists engage in “an earnest quest for the authentic, the pilgrimage of modern man” (MacCannell, 1998). While recognising the validity and importance of these debates, Cohen (2004a, p. 68) stated that in his view, “neither of the opposing conceptions is universally valid. ... Different kinds of people may desire different modes of touristic experiences; hence, “the tourist” does not exist as type”. Cohen (2004a, pp. 69-70) instead proposed five levels of touristic experiences, ranging from the entirely *recreational* and *diversionary* to *experiential*, *experimental* and even *existential*. Uriely (2005, p. 200) comments that this shift began to address the complexity of travel from “homogenizing portrayals of the tourist as a general type to pluralizing depictions that capture the multiplicity of experience”.

As travellers became more sophisticated, seeking ever broader destinations and modes of travel, academics reflected on “*post-Fordist*” consumption – individuated tourism (Urry, 2005, p. 14). New products and services emerged to meet an increasingly highly segmented, consumer-driven “markets of one” (Weaver & Oppermann, 2000). Travel now offers a cornucopia of experiences and learning for those tourists on their “quest for the authentic” (MacCannell, 1998), as well as for those who have no such quest. As Munt (1994) noted, “an A to Z of tourisms has evolved”, often combining tourism with other activities or intellectual pursuits packaged by specialist tour operators or agencies.

Backpackers are one part of this market cornucopia. Pearce's (1990) original definition of backpackers included a preference for budget accommodation and emphases on meeting other travellers, flexible itineraries, longer rather than shorter holidays and informal and participatory holidays. Most studies of backpackers have indicated that more than 80% of backpackers are less than 30 years of age (Richards & Wilson, 2004a).

Industry definitions

The travel and tourism industry has multiple offerings for travellers along Cohen's entire continuum of risk. His *organized mass tourists*, called *packaged* or *group travellers* by the industry, can participate in holidays ranging from "traditional" bus tours viewing a region's scenic highlights to innovative study tours, adventure tours, or cruises. Cohen's *individual mass tourists* cross-mix with his *explorers* to combine travel plans with preferred elements of organized and independent itineraries, such as the pilgrims who enjoy leisure resort tourism on their religious quests (Mustonen, 2005), or the volunteers who combine two weeks of hard labour with a few days of complete luxury (C. P. Collier, 2007).

The multiplicity and independence of travel experiences and roles that contemporary tourists can choose has created its own industry term, *Free Independent Travellers* (FITs). For the North American and European travel industry of the 1980s, FIT referred to individuals travelling internationally who pre-purchased full packages including air, accommodation, and rental car but who travelled independently (e.g., not on a motorcoach) (personal communications with A. Schmidt, American Ring Travel, October 2007). More recently in New Zealand, FIT has been defined as those travellers who may pre-purchase only airfare to their destination through a professional retailer, but nothing else (A. Collier, 2006). Hyde and Lawson (2003) expand this definition to consider all people as FITs who independently book air plus destination accommodations or activities online. Conversely, NZ Ministry of Tourism has adopted the less-known term *Semi Independent Travellers* (SITs) to denote those

who book some, though not all, accommodations or transportation in advance, whether online or through an agent.

Despite the differences defining these travellers, they typify Poon's (1993, p. 114) "*new tourists* ... consumers who are flexible, independent, and experienced travellers, whose values and lifestyles are different from the mass tourists".

"New tourists" are the primary marketing interest of Tourism NZ: a market it terms *Interactive Travellers*. Hallmarks of these individuals are that they seek out new experiences, consume a wide range of products and services, plan and book their holidays directly with the suppliers, are sociable and like to learn (Ministry of Tourism (MOT), 2007).

Backpackers are one subset of the *genus proximus* of FITs (Hamilton, 1988; Hyde & Lawson, 2003). They are often travellers with their own itineraries, who drive themselves or use public transport, stay in a variety of accommodations, have few pre-planned or pre-purchased trip features. They visit for longer but with lower daily expenditures, and "tend to visit many different parts of the country off the main tourist track" (Hamilton, 1988, p. 307). Newlands (2004) confirms this, stating that many of his backpacker respondents used a combination of the Youth Hostel Association (YHA) and /or backpackers' accommodations, stayed with friends and relatives, and camped. Less than 10% of his respondents also used self-catering motels, guest houses, and bed and breakfasts.

Backpackers are broadly defined by the Ministry of Tourism as "travellers who spend at least 30 percent of their visit to New Zealand staying in backpacker /hostel type accommodations" (MOT, 2005). While academics refer to older backpackers as those over 30 years of age, the Ministry considers backpackers as older above age 35, a distinction that makes some direct statistical comparisons more difficult.

The limitations of nomenclature

Are backpackers *drifters* or *wanderers*? *Adventurers* or *explorers*? Are independent travellers *FITs* or *SITs*, and are they all *Interactive Travellers*? When are FITs

wandering? When are they exploring? The word "backpacker" is a good example of the limitations of a term. Created by the tourism industry and legitimised by academics, "backpacker" and its derivations – "backpacker," "backpacking," and "backpackers" – can be nouns, verbs, or adjectives. One can be a backpacker, can backpack, can choose backpacking as a form of travel, can stay at a backpackers or stay at a backpackers' accommodation. One never need own a backpack to backpack.

The nomenclature is repetitive and dull, precise in an all too limiting way. "Backpacker" was created originally as "a description less derogatory than 'drifter' and more succinct than 'budget traveller'" (Ateljevic & Doorne, 2000b, p. 131). However, O'Reilly (2006) asserts that the word "backpacker" succeeds only when it is accepted as a form of self-definition. But what if those choosing this form of travel do not accept it?

In addition to the focused research questions this thesis seeks to address, theoretical topics arise. From an academic point of view,

- By identifying certain people or accommodations as "backpackers", is it restricting rather than enhancing the dialogue about this form of travel and those who choose to engage with it?
- Have the complexities of these travellers' motivations and travel styles – complexities expressed, at times, within the same holiday – moved the debate about backpackers and backpacking beyond simple theoretical constructs?

From the industry's point of view,

- Is industry excluding those who would choose this travel style but who reject the perceived identity that is connected with backpacking?
- Are backpackers' accommodations unnecessarily maligning themselves to potential clients who are not currently on the backpackers' circuit?

- Could backpackers' accommodations strengthen both their occupancies and revenues by appealing to older travellers?

The economics of tourism

How does tourism affect New Zealand economically? What roles do both baby boomers and backpackers play in this economy? The following section situates New Zealand within world tourism, and then reviews the relative importance of baby boomers, backpackers, and the backpacking industry to the national economy. Concerns regarding the changing world economy and their potential effects on this country are also briefly introduced.

New Zealand's tourism economy

New Zealand, though considered one of the world's top emerging tourism destinations, is a relatively small tourism player on the global stage. Of the 898 million worldwide international arrivals in 2007, this country accounted for 2.4 million international visitors, or just 0.28% of that total (MOT, 2008b). Global tourism has averaged 6.5% annual growth between 1950-2007, and is projected to continue at 4.1% growth per year through 2020 (UNWTO, 2008). In comparison, New Zealand averaged an annual growth of 3.9% in tourism from 1990 through 2007 (MOT, 2008b). Strategic plans project that it will continue to increase by 4% through 2013 (MOT, 2007d).

However, global economic realities suggest a more challenging future. Inbound tourism to New Zealand has slowed significantly since 2005, with international arrivals increasing an average of just 2.2% in 2005 and 2006; in 2007, arrivals dipped to 1.9% (MOT, 2008a). The Ministry suggest concern over lower income growth in its primary source markets – Australia, the UK, the US, Japan, China, South Korea and Germany (MOT, 2007c, p. 4). According to the European Central Bank, GDP for 2008 and 2009 within the European Union is estimated only between 1.3% and 2.3%, potentially less than half what it was in 2007 (ECB, 2008). UNWTO note concerns with the deteriorating world economic outlook for 2008 and beyond, observing that tourism spending is discretionary and that “a

tightening of the economic situation will often result in a decrease or trading down of tourism spending” (UNWTO, 2007).

In New Zealand, where the NZ dollar in March 2008 averaged 23% higher than its historical positions against the US and Australian dollars, tourism providers are concerned. While exchange rates are found to have little effect on overall visitor numbers, they have a “profound effect” on visitor expenditures, decreasing by around 0.8% for every 1% increase in the value of the NZ dollar (NZIER, 2006). Therefore, though international arrivals were up more than 2% in 2006, international spend increased only 0.2% in that period, reflecting an actual decrease of more than 1.5% spend per trip (NZIER, 2006).

Some in the tourism industry worry that arrivals and expenditures might continue to shrink. Against that backdrop, this thesis looks at the economic contributions of two specific segments of NZ’s international tourism market: the youth/student travellers typically referred to as “backpackers”, and baby boomers. In the face of tightening world economies and rising currency valuations, will New Zealand continue to appeal to younger budget travellers? Similarly, will baby boomers, many of whom are facing rising costs in both living and travel, choose more economical destinations or modes of travel?

Backpackers

Youth and student tourism, defined as travellers aged 15-26, accounted for 150 million international arrivals in 2004, or 20% of the global tourism market. From 2000-2004, this market grew at an average rate of 3-5% per year. The trend is forecast to continue because of the financial strengthening of emerging markets with youthful age profiles, though demographic trends in traditional source markets (Europe, the US, Japan) are declining (Richards, 2005, pp. 95-97).

Approximately one third of young travellers worldwide perceive of themselves as “backpackers” (Richards, 2005, p. 101). The average trip length for this age group was 63.5 days, though travellers to Australasia spent an average of 128 days.

In New Zealand in 2005, backpackers comprised 10.6% of total international visitors and 9.9% of total international expenditure, spending \$642 million in 2005. They stayed an average of 30.5 days and spent \$NZ 2766 per person. One third stayed for more than a full month. In comparison, non-backpackers averaged 19.3 days in country in 2005, and spent \$NZ 2993 per person (MOT, 2006). More than 86% of backpackers were on their first visit to New Zealand (TNT Magazine & NZBackpack.com, 2003, p. 11).

In this country, 77% of international backpackers were between 18-35 years of age, and 23% were older (MOT, 2006). Older backpackers therefore contributed approximately \$147 million to the economy in 2005. Though the Ministry defines "older" over 36 years of age, this thesis concentrates on backpackers aged 40 and over to situate them within the literature on baby boomers' travel motivations and lifestyle segmentation. However, the qualitative data collected in this thesis from accommodation guests and hosts alike suggest that the attitudes and preferences of the baby boomers interviewed may apply to a broader age range. As one younger traveller commented, "There are really only two age groups here. The very young (aged 18-25) and everyone else".

Baby boomers

Baby boomers represent a generation of individuals born between 1944 and 1964 who currently range in age from their early 40s to mid 60s (Green, 2006; Patterson, 2002; W. Strauss & Howe, 1991). Cohort segmentation – though widely embraced by marketers since the late 1960s, is now gaining acceptance by academics (Patterson, 2002, 2006; Pennington-Gray, Fridgen, & Synes, 2003; Schewe & Noble, 2000). Baby boomers are one cohort of lifecycle studies in which each age group is shaped by its "age location" within major life and historic events (W. Strauss & Howe, 1991). The term "baby boomers" specifically references people born in the United States, Canada, Australia and New Zealand (Cleaver, Green, & Muller, 2000; Cleaver & Muller, 2002), but other markets important for New Zealand also refer to populations of this age cohort as boomers.

They are an economically significant segment of the travelling population. In 2001, Americans aged 50 or older controlled 67% of that country's wealth. In the UK, the figure was 80% for the same age group. By 2010, boomers will fill the important 45-to-64-year-old age bracket. People between 45 and 54 have the highest incomes of any 10-year age segment, and those between 55 and 64 have the largest amount of assets and are the highest percentage of homeowners (Stroud, 2005). All of the countries reviewed by Patterson (2006) – the US, UK, Germany, Israel, Japan, Korea, Australia and Canada – note that older adults are the fastest growing segment of their tourist economies. In the US, although people aged 55 and older comprise only 20% of the population, they buy almost one half of all long haul travel.

Baby boomers are better educated, healthier, more self confident, and more active than any generation to date (Lehto, O'Leary, & Lee, 2001; Mochis, 1996; Muller & Cleaver, 2000). As a whole, they have travelled for business and leisure during their professional lives, and intend to continue travelling as they age. They will travel further afield, and expect more as consumers (Martin, 2003; Patterson, 2006). Though the industry often points to the youth and student market with interest, citing that 1 in 5 travellers is young, the reality is that 2.5 in 5 travellers are aged 40 and older and this market will continue to expand.

This holds true for New Zealand, where 22.3% of arrivals were aged 15-29 years but 51.7% were aged 40 and above in 2007 (MOT, 2007e). Baby boomers are many of New Zealand's FITs and Interactive Travellers and, this thesis contends, may be many of its future backpackers as well.

New Zealand's backpacking industry

New Zealand has been popular with backpackers since the early 1980s. The country has created a high level of services and facilities for backpackers, including networks of accommodations and transport carriers. In 2006, the government reported that there were at least 443 backpacker establishments with some 24,200 beds, an increase of more than 40% since 2001. Many of the

smallest establishments, however, do not report to government as they fall below the threshold of \$30,000 GST annually and are not legally required to contribute data. Therefore these numbers may reflect only about 60% of the sector, representing predominantly larger backpackers' accommodations (MOT, 2007a). One corporation, Base Backpackers, owns 9% of this reported bed base. (Ironbridge Capital, 2006). The not for profit YHA operates an additional 15% of bed base (YHA New Zealand, 2006). That said, the majority of backpackers' accommodations are independently owned and operated; 370 separate facilities are members of BBH Ltd., a privately held marketing association (personal communication with Eric Foley, director, BBH Ltd., October 2007).

Growth in accommodations has been expedited by widely available transportation. In addition to affordable domestic airlines, rail, and public bus systems, New Zealand has a highly developed, privately owned, backpacker transport network with "jump on, jump off" services catering to the schedules and needs of backpackers. Bus passes can include accommodations and even some activities, as well as food and drink at selected hostels. Several scholars have noted that by combining these services the backpacker industry has created products that make these "independent" travellers similar to package tourists (Ateljevic & Doorne, 2000b; Doorne, 1993; Garnham, 1993; Vance, 2004).

Thus, contemporary backpacking in New Zealand, in many respects, reflects Cohen's *mass drifter* (mainstream backpackers). His *adventurer* (long term travellers who embrace the ideology of drifting) is also evident. These different travel roles - or different market segments, in industry parlance - have created levels of polarisation within the industry itself (Ateljevic & Doorne, 2000b; Moran, 2000; Newlands, 2004).

Younger, less experienced travellers who are in New Zealand for holidays of one to three months tend to use the private transport and large backpacker hostel systems - travelling as semi-packaged mass tourists (*mass drifters*). These mainstream backpackers focus more on meeting other travellers and forming

friendships with them, and in participating in high adrenalin, adventure-oriented activities, than in interacting with local cultures.

Conversely, the market segment similar to the Cohen's *adventurer* was identified by Ateljevic and Doorne (2000b) as populated by "traditional, long-term, budget travelers". These "real travelers" are often in New Zealand as part of a round the world, year (or more) long itinerary. This market segment typically travels to more out of the way destinations and most commonly uses public transportation, hitch-hikes, cycles or has a private vehicle. They are often on work-holiday visas. These older, longer range travellers see travel as transition, a form of escape from their everyday lives, and as a process of transformation and personal growth. Cultural immersion, social relations and getting "back to nature" are all important (Ateljevic & Doorne, 2000b, p. 133).

This thesis explores the possibility of a third market segment – New Zealand's *Interactive Travellers* who choose to use backpackers' accommodations during their holidays. More akin to Cohen's *explorer* than his *adventurer*, these individuals are looking for comfortable accommodations, reliable transportation, and social interactions with their host communities, but not full cultural immersion. They are on true holidays – temporary respites from their everyday lives. Most expect to return within weeks or months to their homes and careers. Notably, they are also *post-Fordist consumers* fully engaged in the complexity of travel, creating individuated itineraries and holidays that are uniquely their own by combining preferred touristic experiences. They are *FITs* who prefer budget accommodations to help stretch the affordability (and length) of their holidays; they choose backpackers' accommodations in particular because they enjoy the social interactions with other guests and their hosts. The Ministry of Tourism would define them as *backpackers*. But, as this thesis explores, the more important question is, how will this next generation of backpackers choose to define themselves?

In New Zealand, the word "backpacker" refers to those people who use the budget facilities called "backpackers". This can lead to unnecessary confusion.

Though there is a paucity of alternative terms, this thesis attempts to clearly distinguish between the travellers as “backpackers” and the facilities they use as “backpackers’ accommodation(s)”. However, reference is also made to “older travellers” – individuals who are technically backpackers by their choice of accommodations and yet who reject the self-identity of backpacking. To date, there is no better nomenclature for these somewhat adventurous, offbeat voyagers.

Organisation of thesis

Chapter two, the literature review, will examine three separate areas of research: (1) backpacking literature, focusing on travellers’ self identification, values and motivations; (2) the influences of age and motivations on travel choices, particularly focusing on placing older backpackers within the baby boomer cohort; (3) the importance of backpackers / FITs / interactive travellers to New Zealand’s STEs.

Chapter three presents the research methodology used to explore the identities and perceptions of older backpackers as well as the concomitant industry reaction to this travelling population. The dominant data is collected from 24 semi-structured, qualitative interviews with both older travellers and the owners of backpackers’ accommodations. The resulting findings are then probed further through an exploratory survey into demographics and perceptions of non-backpacking baby boomer tourists travelling in New Zealand.

Chapter four introduces the demo- and psychographic profiles of the older travellers interviewed, and explores their perceptions of self, their travel motivations and choices. This qualitative data is explored thematically; similarities and differences between older and younger backpackers are examined. Responses from the limited survey are utilised to suggest areas of potential differences between older backpackers and other tourists of similar demographics.

Chapter five presents and discusses the preferences and needs of older backpackers, broadening the perspectives offered by published quantitative studies. Survey responses are used again to pinpoint areas of connection and divergence between those baby boomers who backpack and those who do not. In addition, this chapter delves into industry reactions to older backpackers, discussing both facilities' changes and marketing responses.

The concluding chapter presents a summary of the combined findings, connecting the research to the different studies and theories presented in the literature review. The nomenclature of "backpacker" and its related lexicon of terms are again considered in light of its impact on both academia and industry.

2 Literature Review

Backpacker literature

The backpacker as a segment of the travel and tourism industry was little studied until the 1990s, when it became a recognised marketing – and therefore, economically quantifiable – sector (Richards & Wilson, 2004a). The earliest writers about drifter tourism, Cohen (1973) and Vogt (1976), clearly identified several subjects that have become the focus of theoretical research. In turn, these subjects will serve as the structure for the backpacker literature review:

- **creating and refining the definitions** (P. L. Pearce, 1990; Richards & Wilson, 2004a; Riley, 1988; Vogt, 1976);
- **examining motivations behind this travel choice** (Loker, 1993; Loker-Murphy, 1996; Murphy, 2001; Riley, 1988; Ross, 1992);
- **backpackers' gathering places and the growing institutionalisation of facilities** (Riley, 1988; Spreitzhofer, 1998; Vogt, 1976; Doorne, 1993, 1994; Spreitzhofer, 1998);
- **commodification of experiences** (Binder, 2004; Elsrud, 2001); and
- **social interactions amongst travellers** (Murphy, 2001; Riley, 1988; Ryan & Mohsin, 2001);

More recently, mostly quantitative **age-related research** has been undertaken specifically studying implications about the preferences and needs of older backpackers (Cave, Thyne, & Ryan, 2007; Hecht & Martin, 2006; Thyne, Davies, & Nash, 2004).

Collectively, these subjects have offered guidance in creating the semi-structured questions that underpin this current research. The thesis probes older backpackers' responses to questions about self-identity, travel motivations, levels of social interaction, and preferred activities, as well as their lodging preferences and needs.

Creating and refining the definitions

Cohen (2004b) first wrote of a new class of traveller that began to emerge in the 1960s and 1970s, young people travelling *en masse* due to cheap international airfares. He formulated this analysis in 1972, differentiating between “typical” tourists – mass tourists seeking standardised facilities and attractions – and individualistic and non-institutionalised tourists whom he describes as *explorers* and *drifters*. While explorers stray from the regular tourist paths, they still prefer their comfortable accommodations and reliable transportation, and interact to a limited extent with their host communities. Drifters, conversely, “seek the excitement of complete strangeness and direct contact with new and different people. ...[The drifter] immerses himself in the life of the host society. The drifter is, then, the true rebel of the tourist establishment and the complete opposite of the mass tourist” (Cohen, 2004b, pp. 44-45).

The prototype drifter was based on a German whom Cohen met in 1968. The man had travelled alone from the Atlantic coast of Brazil, via the Amazon, to the high sierra of Peru: a truly resourceful, self-reliant, thrifty individual. As Cohen (2003, p. 45) notes later, “The ‘original drifter’ may have been an ideal to which many youths were attracted, but only a very few succeeded”.

Cohen (1973) referred to the antecedents of these earliest drifters as the well-educated Victorian youths travelling on their Grand Tours for adventure and education, German youth out touring nature *en masse* in the early twentieth century, and those travelling on working holiday. Adler (1985) and McCullough (1992) extend these early roots to include religious pilgrims, artisan journeymen serving apprenticeships across Europe, and common tradesmen who “tramped” between towns in a seasonal hunt for work. Adler (1985, p. 338) indicates that, originally, “readiness to tramp was long regarded as a sign of readiness to work”. But she notes that term later was degraded to “denote social marginality and vagrancy” (1985, p. 341).

Cohen (1973, p. 100) fairly quickly modified his definition of drifter from the original one he had suggested in 1972, breaking the prototype into four sub-categories, from the full-time *adventurer* (his original, individual drifter) and *itinerant hippie* (a “travelling dropout, on his way to some drug-sanctuary”), to the part-time *mass-drifter* (a college-aged person out to see the world, but who patronises the drifter-tourist establishments in lodging, transport, and food) and *fellow-traveller* (short-term hippies, modelling behaviour on their harder core counterparts before returning to “real life”). Vogt and Riley, however, each soften Cohen’s term “drifter”. Vogt adopts *wanderer*, a “more romantic, less derogatory term” to refer to “Western middle-class youth engaged in recreation travel” (1976, p. 27); Riley (1988, pp. 316-317) uses *budget traveler* as “this is the term most frequently used by the travelers themselves”.

By the beginning of the next decade, a new term emerged in academic literature: backpacker. Pearce first introduced the term *backpacker* in 1990, noting its already widespread use within the Australian budget travel industry. He (1990, p. 1) asserted, “backpacking is best defined socially rather than in economic or demographic terms. Being a backpacker is an approach to travel and holiday taking rather than a categorisation based on dollars spent or one’s age”. Pearce believes that backpackers are primarily defined by:

- a preference for budget accommodations,
- social interactions with other travellers,
- independence and flexibility in their plans,
- preference for longer rather than brief holidays, and
- emphasis on holidays that are informal and participatory.

Richards and Wilson extensively studied the market’s self-definition in 2002 and found that over half the sample (particularly older, more experienced participants) call themselves “travellers”, while almost one third use the term “backpacker” and less than 20% (particularly the under age 20 group) consider themselves “tourists”.

How do backpackers of the baby boom cohort perceive of themselves? What terms do they use for self-identification, and what reasons do they cite for their accommodation choices? These become central findings of this research.

Backpackers' travel motivations

Cohen (1973, p. 92) contended that "the drifter's escapism is hedonistic and often anarchistic", while Vogt (1976) again softened this perspective by claiming that wanderers travel to maintain contacts with friends and family, to gain personal social recognition and prestige, and to quest after learning and personal growth. Riley, offering a perspective almost 15 years later than Cohen's initial observations, rejects his early findings by asserting that her travelling peers "do *not* drift aimlessly, ... do *not* beg, and are *no* more hedonistic or anarchistic than members of the larger western culture" (1988, p. 318, original emphasis). Rather, she suggests that these travellers are primarily middle class, well educated, and often professionally employed who, because they have chosen to travel for a longer time, are by necessity living on a budget. Riley (1988) and Vogt (1976) both state that these travellers are often at one of life's junctures and wish to travel before studies, career, marriage or family sidetrack them. Desforges (2000) concurs, noting that for his research subjects, travel offers a bridge between their past identities and their future selves.

Cohen (1973, p. 94), writing against a backdrop of extreme youth disillusionment with the American war in Vietnam and the emergence of hippie-counter cultures, hypothesised that "drifting is both a symptom and an expression of broader alienative forces current among contemporary youth". He later softens his own position, suggesting in 2003 that, for contemporary backpackers, though still critical of their own societies, "the overall degree of their alienation has apparently diminished with time" (Cohen, 2003, p. 51). A more recent large scale study supports this shift, contending that "motivations stated by the respondents tend to emphasise a search for difference in other cultures, rather than alienation from their own" (Richards & Wilson, 2004a, p. 28). However, Westerhausen (2002) disagrees, finding that growing numbers of

young people he interviewed are travelling in reaction to alienation to their modern societies. Maoz suggests that it may be age- and experience-related; within her own studies of Israeli backpackers the degree of alienation from society was more influenced by personal life stages, with older travellers being more alienated than younger (Maoz, 2004, 2006).

Uriely, Yonay and Simchai (2002) analyse backpackers' motivations further, contending that there is a difference between form- and type-related attributes in travel, and that backpacking's form-related attributes – length of excursion, flexibility of itinerary, tendency towards low spending – predominate over its type-related attributes – the psychological attitudes toward native country, motivations for travel, and meanings they assign to their experiences. They suggest that backpacking should be considered a form, rather than a type, of tourism.

This thesis continues these discussions, probing for levels of alienation voiced by respondents. Why are they backpacking, and indeed, why are they travelling at all? What are they seeking, and what meanings do they assign to their travels in New Zealand?

Gathering places: The growth of mainstream backpacking

Vogt (1976) spoke of the need for *gathering places*, places in which travellers can physically and psychologically recuperate from wandering by being amongst people with similar values and interests. Cohen (1973) and Vogt (1976) early recognised that these havens created the very institutionalisation of services and facilities that drifter tourism initially rejected. By the late 1980s, backpacker establishments were filling the market with beds. In Cairns, the first independent backpacker lodging opened in 1983, and 42 existed by 1988 (McCulloch, 1991; Slaughter, 2004). In Wellington, the market grew from 150 beds to 500 between 1988 and 1991 (Doorne, 1994). The industry began feeling the economic impact of backpackers. Pearce's 1990 acknowledgement of backpacking as a social – and economic – travel phenomenon began moving the

focus of research from theoretical to practical research applications: reviews of the social and economic impacts and interests of a now-acknowledged market segment.

Cohen would not have been surprised. “The *Vermassung* of drifting and its gradual penetration by economic interests could not but change the original non-routinized character of the drifting” (1973, p. 95). Westerhausen and Macbeth (2003, p. 72) note that the “existence of flourishing backpacker centres frequently invites a “hostile takeover” of local tourism structures by outside operators and competing tourism sectors. The exponential growth of the backpacking industry, particularly impacted by larger-scale accommodations, has created mass infrastructure that is difficult to escape (Garnham, 1993; Slaughter, 2004; Speed & Harrison, 2004). The larger, “full service” facilities even encourage “eating, drinking and socialising amongst these backpacker groups [to] occur on site at the hostel and little or no contact with the local environment is experienced” (Dorne, 1993, p. 534). As detailed by Moran (2000) and Vance (2004), private transportation networks linking well-developed backpacker destinations contribute to fomenting this self-contained travellers’ bubble. Far from being independent travellers on open-ended trips, many backpackers indeed do travel within separate but parallel itineraries to other organised mass tourists.

The current research emphasises a very different, much smaller-scale, accommodation, yet the research participants had been exposed to other backpackers’ facilities and related infrastructure, particularly the transportation systems. What were their perceptions and preferences of different sized facilities, and why?

Commodification of risk

Even risk and adventure have been commodified by mainstream backpacker travel providers. Cohen’s (1973) drifter and Vogt’s (1976, p. 27) wanderer seek “novelty, spontaneity, risk, independence, and a multitude of options”.

Contemporary backpackers do as well, but their ideology is “at considerable variance” with their actual practices (Cohen, 2003, p. 99). Elsrud (2001) writes of backpackers’ narrative of risk and adventure – the ways in which travellers frame their own experiences – without addressing actual physical risks or (mis)adventures. Several scholars have found that travelling allows distinctive experiences from the daily normalcy left behind, which is certainly one of the goals (Binder, 2004; Elsrud, 2001; Welk, 2004). But “backpackers’ experiences are in most cases not risky in the sense of being life threatening. Everyday travelling provides enough material for distinction back home” (Binder, 2004, p. 107). Cohen (2003, p. 100) writes that backpacker-oriented tour companies create illusions of risk and adventure, and comments that there exists “an ironic parallel between backpacker tourism and conventional tourism: both thrive on fantasy, supported and exploited by different sectors of the tourist industry”. Nonetheless, backpacking – particularly in New Zealand – is known for thrill-seeking, adrenalin-pumping opportunities, presenting the industry with challenges in organising “safe” risk because, as Richards and Wilson (2004b, p. 259) note, “unless there’s a perception of risk, the experience will not be interesting enough”.

These findings discuss experiences that baby boomer backpackers are seeking. Do they participate in the commodified risks for which New Zealand, as a destination, has become well known? What level of risk and adventure are they seeking?

Backpackers’ social interactions

Studies of backpackers’ social interactions substantiate what Cohen (1973) and Vogt (1976) initially surmised: that drifters and wanderers, budget travellers and backpackers, tend to form acquaintances and even intimacies quite quickly and, just as quickly, to move on with few regrets. Both early scholars write also of the importance of other budget travellers’ comments and recommendations in destinations and activities, and these are again borne out by subsequent, more extensive studies (Binder, 2004; Murphy, 2001; Riley, 1988). Riley (1988)

elaborates on these communications, stressing that one goal is to create personal status through stories about life on the road and knowledge of the best bargains and values. Murphy (2001) finds that the desire for social interaction with travelling peers is second only to the desire for budget accommodations as a motivator for backpackers (2001). Later studies also confirm Riley's (1988) findings that backpackers have interests similar to other travellers but are more limited in daily expenditures because of total trip duration (Loker-Murphy, 1996; Ross, 1992; Ryan & Mohsin, 2001). To date, research has consistently reinforced that backpackers' interactions with each other are of more importance than their interactions with their hosts and host communities (Doorne, 1993; Elsrud, 2001; Murphy, 2001; Spreitzhofer, 1998). Binder (2004, p. 97) goes so far as to say, "While social scientists are looking for a morally deep involvement with the host cultures, backpackers see their brief contacts with other backpackers, taxi drivers, hostel owners or people sitting next to them on buses as sufficient 'Otherness' in contrast to the experiences they usually have at home".

Cohen's *mass drifter* now dominates the mainstream backpacking industry, overpowering, through sheer numbers, his *adventurer*. This has created a polarisation within the industry. According to Ateljevic and Doorne (2000b), long-term, budget travellers believe their travel ideologies and purposes differ significantly from mainstream backpackers, and deride the mass tourists for their pre-planned, pre-packaged tours. They perceive that mainstream backpackers' goals are to party and have fun rather than understand and interact on any significant level with their host country and communities. This has created a new wave of "anti-backpackers", travellers who claim that the worst travellers they meet are backpackers.

Are older travellers different? What levels of social interaction do older backpackers seek, and with whom? How important are interactions with fellow travellers versus with their hosts or host communities? How does the quest for social interaction influence travel behaviours of older backpackers?

Age-related backpacking research

While backpackers are generally assumed to be young, there have been no studies that indicate that age is a restricting factor. Pearce's (1990) social definition specifically precludes age as a criterion; additional studies indicate that nationality is more of a natural definitional boundary amongst backpackers than is age (Loker-Murphy & Pearce, 1995; Ross, 1992, 1997; Ryan & Mohsin, 2001).

Several scholars contend that a new variety of backpackers is emerging, people who prefer budget travel but who are now constrained by relatively short holidays (Scheyvens, 2006; Thyne et al., 2004). Scheyvens' (2006, p. 78) research indicates that backpackers using Samoa's inexpensive *fales* (thatched beach huts) are "people of all ages who are seeking a reasonably priced, adventuresome and 'less tourist' holiday option during their two or three week vacation". A study of Canadian hostels posits that "the older, more affluent contemporary backpacker may ensure both growth and revitalization for those hostels willing to accommodate the changing needs of this new class of customers" (Hecht & Martin, 2006, p. 70).

One organisation doing so appears to be the YHA. Four separate studies focussing on demographics, lifestyle segmentation, needs and preferences of backpackers have isolated findings particular to their older guests (Cave et al., 2007; Hyde et al., 2008; Nash, Thyne, & Davies, 2006; Thyne et al., 2004). YHA has a relatively high percentage of older guests, perhaps because of life memberships acquired at younger ages. In New Zealand, for instance, Hyde et al. (2008) found that almost half of YHA members staying as guests at the hostels were more than 36 years of age. A study of the Scotland YHA argues that "instead of segmenting this market on their demographics, it is more useful to focus on lifestyle segmentation" (Thyne et al., 2004, p. 98). Hecht and Martin (2006) agree, stating that backpacking is less about chronological age and more about travel style choices. Uriely et al. (2002, p. 536), having determined that backpacking is a form of tourism, suggest that the inherent heterogeneity of

backpackers be further investigated from a marketing point of view to offer different backpackers with a range of tourism products and services.

Influences of age, motivations, lifestyle on travel behaviours

Are older travellers different than their younger counterparts? In order to frame research that might provide insights to older backpackers' perspectives, literature was reviewed that discussed ageing from several different aspects: physical versus cognitive age, specific examinations of why older people travel and how their motivations might change over their life courses, and how their lifestyle choices – and economic realities – might affect their travel behaviours.

Physical versus cognitive age

Findings in the backpacker literature that age is largely irrelevant reflect a realisation in social studies that physical age, though easy to research and record, is a relatively weak indicator of people's travel interests and behaviours (Mochis, 1993, 1994; Peterson, 2007; Schewe, 1990). Mochis (1993, p. 44) explains that "because people age differently, and aging is inherently multidimensional, a wide variability in attitudes, behaviours, and abilities exists ... even among people of the same age". But researchers vary in the age bracketing they apply; age categories used to define older travellers range from age 50 plus, or 55 plus, or 60 plus, or 65 plus, depending on the study (Patterson, 2002; Stroud, 2005). Patterson (2002, p. 12) notes "a lack of consistency in defining the age cohort and the specific name to describe older people's tourist behaviour at different stages of the lifecycle".

In addition, as the population is constantly ageing, attempting to "bracket" or classify people within age ranges is, in effect, like shooting a moving target. When Bartos (1983) mentioned 55 year olds, he was referring to people born in 1928. However, for a study of senior lodging preferences in 1994 (Lieux, Weaver, & McCleary, 1994), the 55 year olds were born in 1939. Strauss and Howe (1991) define people born between 1925 and 1945 as *the silent generation*, a cohort

characterised as cautious, indifferent, lacking in imagination and adventure, frugal and price conscious.

The silent generation are the parents of today's *baby boomers*, a generational cohort born between 1946 and 1964 of considerably different psychographic makeup than their elders. Today, people in their mid 50s were born in an era of optimism and growth. Boomers are characterised by a "quest for self", a strong commitment to individual conscience over duty to community (Pennington-Gray et al., 2003, p. 344). While many scholars have noted that people in the age bracket of 50 years and older group are becoming more healthy, more active, more financially independent, few have used these age cohorts to explain the generational differences (Patterson, 2006).

However, a few researchers have recognised this anomaly, and have been writing of the coming of an "ageless" market or "age neutral" market (Dychtwald, 2005; Schiffman & Sherman, 1991). Dychtwald (1999) suggests that adults of all ages agree that people are not perceived to be old today until age 75. Perhaps the largest scale, and most contemporary, travel study comparing income and assets to the effects of age, researched between 2000-2002 of 33,576 US respondents, states that "the younger Seniors (those aged 55-74) have the same pattern of vacationing as those 35-54 years of age" (Peterson, 2007, p. 40). However, Alreck (2000, p. 904) disputes these findings, citing an age roles study she first conducted in 1980, and repeated in 1997, that finds no appreciable difference in age role norms between 1980 and 1997.

Significantly, many scholars agree that cognitive age – how old one *feels* – is a better indicator of life-satisfaction and attitudes (Barak & Schiffman, 1991; Mochis, 1996, 2003; Schiffman & Sherman, 1991). Peoples' perceptions of their age influence their behaviour. Mathur, Sherman and Schiffman (1998, p. 272), referring to the cognitively young as the "new age elderly", note that "the difference between chronological age and cognitive age for new-age elderly was almost 12 years compared to those [of the traditional elderly]". Cleaver and Muller (2002) found that the difference was 10.2 years and that this increased as

people age. Additionally, “one might argue that traveling is associated with challenge and adventure and, therefore, may have a stronger appeal to those who feel younger than their chronological age” (Shim, Gehrt, & Siek, 2005, p. 78).

This research examines older backpackers’ perceived age. What are their activity levels, and are they comfortable with interacting socially with multiple generations?

Travel motivations

Travel motivation was posited most simply as “Why do people travel?” by Lundberg in 1974 (cited in Dann, 1981). It is seen as “the set of needs and attitudes that predispose a potential tourist to act in a specific goal-directed way” (Pizam 1979, cited in Patterson, 2006, p. 26). Iso Ahola (1982, p. 256) theorises that “satisfaction that individuals expect to derive from involvement in a leisure activity is linked to two motivational forces: approach (seeking) and avoidance (escape)”. Dominant travel motivations have been identified by many as novelty, self-development (including cultural experiences), relationship building, and escape (Dann, 1981; Iso-Ahola, 1982, 1989; P. L. Pearce, 1993). In particular, travel motivations of older travellers have been studied (Horneman, Carter, Wei, & Ruys, 2002; You, O’Leary, & Morrison, 2002). Significantly, Mannell and Iso-Ahola (1987) recognised the possibility that older people would begin travelling in order to seek new experiences, not merely to escape their own everyday lives.

Pearce introduced the concept of the *Travel Career Ladder* as a theory of motivation in 1988 and revised it in 2005 to “de-emphasize the hierarchical elements ... and propose a *Travel Career Pattern* (TCP) in which it is the dynamic, multilevel motivational structure that is seen as critical in understanding travel motivation” (P. L. Pearce & Lee, 2005, p. 227). The TCP reflects Maslow’s hierarchy of needs, and proposes that people become more sophisticated in their travel motivations as they become more experienced travellers. The desire for

cultural experiences, for instance, grows stronger as people accumulate more experience. More experienced travellers expressed interest in self-development through nature and host-site involvement, whereas less experienced travellers stressed stimulation, romance, security, nostalgia, and self-actualisation. However, Pearce concedes that those four dominant travel motivations – novelty, relationship, self-development and escape/relax – remain constant throughout peoples' travel careers.

An additional study suggests that "as more people move up Maslow's hierarchy of needs, inconspicuous consumption will steadily replace the predominantly status-driven consumption of the post-war years" (Yeoman, Munro, & McMahan-Beattie, 2007, p. 183). The writers posit that, in the coming "experience economy", well-educated, well-travelled people will be more concerned with experience than with material possessions (p. 187). Muller (1997, p. 306) agrees, stating that, to many boomers, "economic success and prosperity may well appear hollow. They will increasingly realize that self-fulfilment and a satisfying, meaningful life can be achieved with other, more easily attainable, more pleasurable, less materialistic agendas".

Less idealistically, there is an additional, significant determinant of travel interests and preferences. Shim et al. (2005) state that income is directly relevant to travel intentions, but not attitudes. Similarly, Peterson's (2007) large study finds that "age-group differences are not the biggest story in demographic influences on vacation. They are eclipsed by the effects of economic variables such as income and assets".

Many of the issues addressed in this body of literature are also present in backpacker literature – e.g., the impact of experience on self definitions and types of experiences sought. This thesis reflects those cross-over areas by examining the dominant travel motivators for older backpackers. Are they more "sophisticated" and experienced travellers than their younger counterparts? How do they manifest their consumption choices? What role do economics play in their decisions?

Lifestyle segmentation

Tourism has been firmly situated within lifestyle segmentation studies of consumer behaviour. Gonzales and Bello (2002, p. 67) have determined that “there is a significant relationship between individuals’ lifestyles ... and their behaviour as consumers of tourism on leisure journeys”. These authors contend that there are two principle methodologies used: segmentation based on individuals’ way of life and outlook (attitude, opinions and interests [AOI]), or segmentation vis à vis examination of the product individuals use – their “consumption style”.

Several researchers have segmented tourists into different lifestyle groups defined by their attitudes, interests and opinions to determine their preferred travel motivations, experiences, activities, and travel styles (Cleaver & Muller, 2002; Patterson, 2002; Shoemaker, 1989, 2000; Thyne et al., 2004). Most of them use slightly different nomenclature and AIO characteristics, however, that make comparable analyses amongst the research difficult. But one study reviewed the demographics and psychographics compiled by national research bases of Boomers across four countries: the United States (76 million people), Canada (8 million), Australia (5 million) and New Zealand (1 million) and discovered that there is much segment similarity across countries, and much segment disparity within countries. Particular subsets of Boomers are attracted to particular travel styles and experiences, characterised by similar education, socioeconomics, and motivations (Cleaver et al., 2000, p. 276).

This thesis suggests that older backpackers also fit the parameters of a particular baby boomer lifestyle segment that can be broadly applied across many source countries for New Zealand. They are well educated and relatively well off financially. They are travelling for the sake of discovery – to meet new people and learn new things, and to satisfy their curiosity. They reject the conventional idea of retirement and perceive of themselves as younger than their chronological ages. As Silvers (1997, p. 303) comments, “today, almost half a

person's adult life will be spent over the age of 50. ... Today, 50 is truly a mid-point, not an end point".

Small tourism businesses in New Zealand

The third research perspective offered in this thesis reflects the points of view of small tourism business owners within New Zealand. To give context to the qualitative interviews and the related findings, the literature was reviewed to "set the stage" with statistics and studies that would offer a picture of contemporary reality for the owner operators of backpackers' accommodations.

A few studies have addressed the importance of smaller backpacker accommodations, particularly in developing countries, and their often significant contributions to local economies and communities (Hampton, 1998; Scheyvens, 2002; Visser, 2004). Others have researched how small backpackers' accommodations have benefited rural, less visited communities in Australia and New Zealand (Ateljevic & Doorne, 2000a; Westerhausen & Macbeth, 2003).

In New Zealand, for example, backpackers' accommodation sector yields are 6.7%, considerably higher than yields for hotels (4.0%), motels (5.3%), or campervan parks (3.7%) (Tourism Recreation Research and Education Centre (TRREC), 2007, p. 8). Backpacker tourists offer the least spending yield (coach tourists offer the most), but offer the most residual income for accommodations' owners and other backpackers' suppliers (TRREC, 2007b, p. 25).

In New Zealand, small and medium sized enterprises (SMEs), defined as having fewer than 19 employees, comprise 96% of all businesses (Ministry of Economic Development (MED), 2007, p. 5). Tourism enterprises are one part of this economy. Within businesses in the accommodation, café and restaurant sectors, 62% have five or fewer full time employees (MED, 2007, p. 17). Many are family owned and operated. This profile fits most members of BBH, the country's largest affiliation of independently owned backpackers' accommodations. They typify the country's small tourism enterprises (STEs) in structure and employees.

(STEs) play a critical role in tourism development (Page et al., 1999), potentially offering the first (and only) contact tourists might have with local businesses in any given region (Thomas & Thomas, 2006). Hawkins notes that STEs offer the entry point for visitor spending in the local area (Hawkins, 2004). They have been flourishing since the mid 1990s as a result of the burgeoning interest in and demand for differentiated tourism products (Poon, 1993; Thomas, 1998). Small firms play an important role in new product innovation and specialisation (Carter, 1996). Ateljevic and Doorne (2000a, p. 379) argue that by limiting the scope of STEs, some owners make a conscious choice to “strike a balance between economic performance and the sustainability of sociocultural and environmental values”.

Family businesses can be broadly categorised in one of two ways: as family centred businesses or business centred families (Singer & Donohu, 1992). In New Zealand, lifestyle appears important to many of these entrepreneurs. Page, Forer, and Lawton (1999) find that owners and operators of STEs are attracted to the business by a combination of factors: lifestyle, enjoyment of the work, wanting to be their own bosses. In addition, a few saw it as a way of easing into retirement (Page et al., 1999). Dewhurst and Horobin (1998, p. 30) note that these entrepreneurs may define success not as much by economic gain as by “the ability to perpetuate their chosen lifestyle”. Ateljevic and Doorne (2000a) support that finding, encouraged that it moves the debate beyond the usual development and business growth as unique success indicators into an acceptance of social and cultural values as co-equal indicators of success. Shaw and Williams (2004) further refine the discussion by suggesting that individuals may be located on a continuum between materialistic and non-materialistic goals. However, a 2007 study indicates that owners are still most motivated by wishing to develop a profitable business, be challenged by the work, and be their own bosses; in that study, lifestyle ranks only sixth in importance (TRREC, 2007a, p. 14).

Seasonality, defined by Butler (2001, p. 5) as a “temporal imbalance in the phenomenon of tourism”, is certainly affects New Zealand’s STEs, particularly in regards to their lifestyles. For most of the country, “high season” falls between December and late March, “shoulder seasons” extend into the spring and fall, and “low season” dominates the balance of the year. While seasonality causes considerable concerns for suppliers attempting to maintain consistency in revenues and staffing levels, Butler discusses the positive aspects of seasonality as well, theorising that less busy seasons allow communities and service providers to have time for recuperation and restoration. Ateljevic and Doorne (2000a) concur, writing that seasonality offers a welcome break for small operators in New Zealand.

Additional research has underlined further commonalities amongst STEs in this country. Two separate studies determined that a majority of tourism operators were relatively recent arrivals in the region (Ateljevic & Doorne, 2000a, 2004). One study found that 70% of operators had no previous experience in tourism (Page et al., 1999). Entry into STEs has relatively low barriers in terms of capital, skills and experience. This in turn encourages high levels of start-ups and relatively slim profit margins required for survival (Shaw & Williams, 2004).

According to Cressy and Cowling (1996), small businesses often share key features:

- the owners have a significant portion of their own wealth invested in the business; and
- the business may rely heavily on the owners/operators, creating a potentially imbalanced [flat] management structure that may lack financial, human resource, management or marketing skills.

There tends to be little division of labour within STEs; owners are managers, front line personnel, and maintenance workers. In addition, because they provide much of the financing themselves, there is often limited requirement to produce or implement a formal business plan (Shaw & Williams, 2004). A 1994

study indicated that only 53% of New Zealand's STEs had conducted a feasibility study prior to start up (Deloitte Touche Tomatsu). Page (1999) found that only 11% of STEs in his study had a formal business plan, and that 25% had none at all. But by 2007 there was perhaps some market improvement: 72% of STEs reported having a business plan for up to 12 months ahead (TRREC, 2007a, p. 16).

Small firms in New Zealand were found to be risk-averse, and may be content with relatively low financial returns (Shaw & Williams, 2004). A recent study indicates that business operators do not effectively factor costs into their pricing decisions, but rather that they priced to the level of their competitors. Those who did not incorporate these costs had lower financial yield than those that did (TRREC, 2007b).

However, the same financial yield research found that, though business owners were motivated by both lifestyle and business factors, there was no discernible compromise of financial yield for these STEs over purely business-oriented firms. "This should help dispel the myth that 'lifestyle' businesses are financially unsuccessful, and is a very important finding for tourism, given its reliance on committed and high quality small and medium sized businesses" (TRREC, 2007b, p. 12).

Though there is a high level of interest in marketing, there is a low awareness of what marketing is beyond promotion. Most respondents felt competent answering questions about their market mixes, but only 59% had done some form of actual market research such as asking where people were from, or how they'd heard about that particular STE (Deloitte Touche Tomatsu, 1994).

Most STEs are constrained by limited business and marketing expertise, and that day-to-day business operations take precedence over longer term strategising. Page (1999, p. 438) contends that this results in marketing that is "poorly used in many cases through over-generalised and inappropriate methods and techniques".

Storey (1994) suggests that small firms generally spend less on research and development but are more responsive to emerging market demands and niches. STEs have a strong commitment to and focus on customer service and client satisfaction. Customer satisfaction is, in fact, a more important indicator of perceived success than profitability (TRREC, 2007b, p. 13).

How do the owners of BBH backpackers' accommodations fit into this body of literature? What are the commonalities they share with other STEs in New Zealand? How does lifestyle choices influence their decisions about facility expansion and marketing?

This literature review has uncovered a potential intersection of interest: that of baby boomers who are socially aware, experientially driven, and less consumption-oriented with that of affordable accommodations that offer social, unique experiences. It is possible that STE owners recognise this growing opportunity, but potentially lack the sophistication to market and price themselves appropriately to achieve greatest returns from this emerging market segment.

3 Methodology

The purpose of this study is to gain a deeper understanding of the older guests currently using New Zealand's small backpackers' accommodations, as well as to explore theories regarding why more older travellers are not using these facilities. The research questions explore how the travellers perceive of themselves; what are their reactions to the term "backpacker" and its related terminology; what are their motivations for choosing these accommodations; and what are their needs and preferences (and why). In addition, the thesis seeks to review how the industry is responding to older backpackers with both facilities and marketing.

Prior research by Cave et al. (2007) that addressed, in part, older travellers' needs and levels of satisfaction with backpackers' accommodations and hostels was quantitative by design. It was *etic* in nature, which Pearce and Lee (2005, p. 3) comment is "where the researcher, as an observer and outsider, classifies and describes the tourist's behaviour". It could not, due to its very structure, provide in-depth, *thick descriptions* of travellers' choices and preferences. *Thick descriptions* are described by Geertz (1973) as explanations of not only behaviour, but of context as well. Alternatively, Pearce and Lee (2005, p. 3) note that *emic* research involves "finding out from [the tourists] how they see the world, how they look at the setting, the other people in it and the value of their experience". Morse and Richards (2002, p. 28) support that view, commenting that, "if the purpose is to learn from the participants in a setting or process the way they experience it, the meanings they put on it, and how they interpret what they experience, you need methods that will allow you to discover and do justice to their perceptions and the complexity of their interpretations". A qualitative approach was therefore decided upon to explore and understand these travellers' decision-making processes.

Qualitative interviews

Twenty-four separate qualitative interviews were conducted with travellers and backpackers' accommodation hosts to record multiple points of view. Sixteen were with travellers between 41 and 63 years of age who had or who were currently using backpackers' accommodations. Eight additional interviews were held with the accommodations' owners or operators at the same locations as the traveller interviews. Interviews ranged from 40 to 90 minutes in length, yielding 23 hours of transcribed material for review and analysis.

From the original backpacker research (Riley, 1988; Vogt, 1976) to more recent additions (Binder, 2004; Maoz, 2007; Scheyvens, 2006), research has been conducted primarily in the field. The research for this study was as well, with the researcher interacting directly with the subjects as a fellow traveller, while also indicating that she was conducting research. As Desforges (2000, p. 933) comments, this allowed for a "shared knowledge of travel in general which could be drawn upon during the interview. It also provided a level of trust and familiarity between the interviewer and interviewee".

It has been noted that the interviewer is critical in ensuring the success of qualitative research (Gillham, 2005; Jordan & Gibson, 2004). One large study in Australia hired an interviewer of a "similar age and background" to other backpackers to do the interviews, stating that this person could most comfortably engage in discussions with her peers (Murphy, 2001). For this thesis, the researcher fit well into that role – in her late forties, she is a baby boomer of the same generational cohort that she is researching. Further, with a hotel background, she was able to relate to the opportunities and challenges experienced by accommodation owners and managers. Though not intentional, only people of European extraction (North Americans, Europeans, New Zealanders) were interviewed. They parallel, as Jamal and Hollinshead (2001) suggest, the researcher's own "lifespaces and cultural understandings".

All interviews were conducted at lodgings where the researcher also stayed, except for two interviews held with New Zealanders who had used

backpackers' accommodations but who were not currently travelling. The site selection, defined as "a bounded context in which one is studying events, processes and outcomes" (Miles & Huberman, 1984, p. 28) allowed for the high probability of interactions with the people needed for interviews. This achieved several purposes outlined by Decrop (1999): first, it was easy to approach the owners/managers to build rapport with them so that they actively supported this project, in other words, to *negotiate entry* into the research setting. Second, it was viable to schedule meetings around the activities of interviewees, thus accommodating their needs and more easily build the necessary relationship groundwork with them. As Gray (2004) and Morse (1991) suggest, this also allowed for hours of observation about the pace and atmosphere of each accommodation to be undertaken, as well as noting ongoing interactions of guests and the host /guest relationships. One hundred percent of owners and older guests approached agreed to participate and, indeed, several people who were not demographically appropriate (younger than age 40) also wanted to participate and be "heard".

The credibility (internal validity), dependability (reliability), and confirmability (objectivity) of this study (Denzin, 1978) was enhanced by collecting the data from multiple sites; by ensuring that the data was during both high and shoulder seasons; and by collecting data from multiple points of view, in this case, those of older guests and the accommodations' owners.

The dependability of site data collection was strengthened by choosing locations on the North Island to reflect city (Auckland), town (Paihia), and rural (Northland and Coromandel Peninsula) settings. Specific accommodations were selected by two methods: for each new geographic location, facilities were chosen based on the user-assigned ratings in the BBH guidebook, with the reasoning that older backpackers also would choose lodgings ranked fairly highly on cleanliness and friendliness. *Snowball sampling* and *purposive sampling* were then used to expand the initial facility selection. *Snowball sampling* was described by Gray (2004, p. 88) as using an initial small number of subjects to

identify others. The first backpackers' accommodation owners and guests were asked for recommendations of additional BBH locations that might offer particularly strong data collection opportunities. The research also relied on *purposive sampling*, that is, selecting participants for their awareness of the central questions being addressed (Creswell & Plano Clark, 2007). This is in keeping with Morse and Richards' (2002, p. 173) observation that research should "include participants who are knowledgeable about the information required, willing to reflect on the phenomenon of interest, have the time, and are willing to participate".

Interviews were purposely spread over several months to obtain data from both the shoulder season (October, November) and high season (January, February), trying to determine what, if any differences there might be in responses from either hosts or guests. No difference was perceived in guest responses, although hosts, understandably, had less time to converse in the high season. Host data collected from the different interview dates, however, were consistent.

According to Decrop (1999), good data should have density; each interview should confirm or build on others given. Further, data should not be over collected, but rather well managed. Accordingly, the number of interviews was limited, so that detailed views of each participant could emerge. Strauss (1990) defines saturation as obtained when no new or further information is elicited from data collection. Consistency in interview responses from both the older travellers and backpackers' accommodation owners indicated that saturation was reached in this qualitative study.

By conducting semi-structured, in-depth interviews, the basic information collected was deliberately controlled to keep it relevant to this study's goals and boundaries (Decrop, 1999; Gray, 2004) while allowing an open discussion to ensue that encouraged asides, additions, and after-thoughts about each person's experiences and reflections. The basic question outlines for both travellers and owners are located in Appendices A and B. Rubin and Rubin (1995, p. 17) referred to qualitative interviewing as "the art of hearing data", requiring

“intense listening, a respect and curiosity about what people say and a systematic effort to really hear and understand what people tell you”. In many respects, that was the approach these interviews followed. In order to encourage the open flow of conversation and thought, all interviews were digitally recorded. This allowed the researcher to focus completely on hearing the data, as well as ensuring their accurate transcription and analysis. In addition, field notes were taken daily about the accommodation, types and interactions of backpackers, the “feel” of the accommodation’s public and private areas, and other brief conversations had in passing with travellers of all ages.

Analysis of the interviews was done initially by *latent content analysis*, as expounded by Tashakkorie and Teddlie (1998), to summarise overall impressions from the interviews, the responses to the questions and themes. Broad themes and key words emerged, influenced by the interviews’ semi-structured, indicative questions. Themes included: motivations for and preferences in using backpacker accommodations, perceptions of themselves as travellers or backpackers, information sources and holiday structures. Comments were then grouped based on these different themes, and sub-themes of each began to emerge based on the similarity principle. The data was coded along these broad themes, then further sub-themed to search for more precise languaging. The data were then re-organised into findings that reflect and amplify earlier discussions of backpackers. Interviews with backpacker owners were used to supplement the primary interviews with the older travellers; these additional perspectives allowed a longer view that confirmed or contested the travellers’ own perceptions.

The qualitative results obtained by the current research were consistent in two respects: firstly, they confirmed the personal motives and observations of individuals using backpackers’ accommodations. Secondly, and as importantly, they appeared to support the theory that perceptions of negative stereotyping surrounding these accommodations might deter other older travellers from

experimenting with them. To support or contest the validity of the latter supposition and “to obtain different but complementary data on the same topic” (Morse, 1991, p. 122), an additional research step was required. Current users and hosts obviously could not definitively address this theory about negative stereotyping as they were already using, and were strong proponents of, these accommodations. An obvious question emerged. How do *non*-backpackers of similar demographics view backpackers?

Exploratory survey

Patterson (2006) and Stroud (2005) both contend that one of the most difficult things to research in consumer behaviour is why people do *not* choose to purchase a product or service. It is expensive and time consuming to target non-users, and few surveys – particularly in tourism – do so. In the extensive literature review for this thesis, no reference was found that targeted *non*-users of these accommodations.

Citing Morgan (1998), Creswell and Plano Clark (2007) recommend *exploratory sequential design* when the researcher wishes to generalise results to different groups or to measure the prevalence of a phenomenon. *Exploratory sequential design* uses questions specifically derived from the qualitative phase to direct the research questions in the next phase. Strengths of this design include its ease in implementing and reporting, and that the additional data can strengthen the initial qualitative findings. Weaknesses of this design include needing to appropriately determine which are the most relevant qualitative data to research further, and deciding how to collect the new data in a way that will not adversely impact the original research (Creswell & Plano Clark, 2007).

In this case, the first phase had collected in-depth, thick data that identified participants’ perceptions of the situation. The emerging theory was that, due to decades old stereotypes of backpackers’ accommodations and hostels (e.g., large dorms, chores, rules, substandard housekeeping) as well as contemporary stereotypes (e.g., young people, fuelled by excessive alcohol, being noisy and

disruptive), most baby boomers dismiss the potential of using backpackers' accommodations for their own needs. Two simple preliminary questions could ascertain this theory's legitimacy. How do baby boomers travelling in New Zealand view these facilities? What images or thoughts do the words "backpackers' accommodations" conjure up for non-users? The instrument of this second phase of questioning built directly on the first; the two data sets were constructed to see whether the qualitative results might be confirmed and generalised.

Passengers on the ferry route between Auckland's Central Business District and the outlying community of Devonport, a popular day excursion, were approached during non-commuter hours. Seeking to complement the existing qualitative data, only baby boomers – people of European origin who appeared to be over 40 years of age – were approached. By their accessories (daypacks, clothing, maps, cameras, guide books) they appeared to be tourists to Auckland and/or New Zealand. Fifty-six parties were approached. Of those, one was local and one refused to participate, which left 54 viable responses to be examined.

The interview consisted of a simple and quick series of pre-written questions asked of one party member pertaining to their age, nationality, length of travel, booking patterns and accommodation choices. Two open-ended questions were then asked about familiarity with the word "backpackers", and their perceptions of backpackers' accommodations. The interview lasted less than three minutes. The survey instrument is located in Appendix E.

Weighting the two resulting data sets appropriately is key (Creswell & Plano Clark, 2007; Morgan, 1998). The qualitative data – the 24 in-depth interviews with actual backpackers and accommodation hosts – are the dominant data of this study and are presented as such in the findings. The sequentially designed survey of baby boomer tourists was an exploratory investigation to see if the results could be confirmed on a (somewhat) broader scale, and must be interpreted as such. The strength of this mixed methods design is to cross-check the initial findings by querying the obvious (missing) participants – in this case,

non-users of these facilities. The weakness of this method lies in the potential limitations of the *convenience sampling* approach that was used to sample baby boomer travellers. Convenience sampling, defined as “selecting those respondents from the population who are obtainable or convenient to reach” (Alreck, 2000, p. 43) may have portrayed a limited and potentially inaccurate portrayal of the general travelling population and must thus be regarded with caution. In the words of Gray (2004, p. 88), these results may be “a useful indication of a trend but need to be treated with extreme caution”.

The data sets from the qualitative interviews and the surveys were then compared on different levels and the results – in which the exploratory survey did indeed appear to support the qualitative findings – are presented and discussed in chapters four and five.

4 Perceptions and motivations

The main focus of this study is older backpackers. The research is primarily concerned with how these travellers perceive of themselves, what are their motivations for choosing backpackers' accommodations, and what are their needs and preferences in lodging (and why). Additionally, the research continues the conversation about whether the nomenclature of "backpackers" limits or distorts perceptions of the actual product and its users (Richards & Wilson, 2004a; Welk, 2004).

The thesis expands on existing quantitative studies (Cave et al., 2007; Hecht & Martin, 2006; Thyne et al., 2004). By taking an emic and reflexive approach, the research follows Cohen's (2003, p. 107) advice to reflect on "the manner in which [backpackers] themselves construct, represent, and narrate their experiences". The findings are then compared and contrasted to existing writings in the literature to delineate areas of potential similarity and dissimilarity between older and younger backpackers.

Demographic profiles

As Gray (2004) suggests, due to the limited scope of qualitative research, the demographic information gathered for this thesis cannot be extrapolated to represent the population as a whole. However, certain basic data are presented here by way of introducing the participants and creating context for analysis against other literature.

Table 1 reviews the older backpackers. Their names have been assigned by the researcher. In subsequent discussions, these individuals are referred to as "older backpackers", "older travellers", "guests", "interviewees" or "subjects".

Table 1: Demographics of older backpackers

I.D.	Nationality	Age	Travels with	Education	Employment	Annual income range \$ (1000s)
Ken	Canada	45	solo	post grad	employed	< 50
Helen	NZ	54	solo	post grad	employed	50-75
Ingrid	Germany	50	solo	post grad	self	> 100
Brian	Ireland	42	solo	university	self	50-75
James	Scotland	54	solo	post grad	retired	50-75
Paul	UK	58	spouse	university	self	50-75
Heinrich	Germany	42	spouse	university	employed	75-100
Birgitta	Netherlands	50	solo	university	employed	50-75
Betty	UK	53	spouse	college	self	50-75
Kim	NZ	48	solo	post grad	employed	50-75
Rita	US	48	spouse	university	self	75-100
Edward	UK	59	spouse	post grad	retired	< 50
Wally	US	62	spouse	university	self	75-100
Erich	Sweden	54	adult son	post grad	employed	> 100
Catherine	UK	60	spouse	post grad	retired	< 50
Louise	UK	61	solo	post grad	self	50-75

Of the sixteen older travellers interviewed who were using backpackers' accommodations, eight were male and eight were female. Five people were from England, two each were from New Zealand, the US, and Germany, and one each came from Ireland, Scotland, Canada, the Netherlands, and Sweden. The researcher encountered no older backpackers from Asia, the Middle East or

Latin America, though younger backpackers from each of these regions were present at the accommodations.

Eight of the subjects were travelling solo, seven with their spouses, and one with his adult son. There were no backpackers with young children staying at any of the selected accommodations. Three interviewees considered themselves to be fully retired, six were employed, and seven were self-employed. Of those who were self-employed, four had had a recent contract cancellation or delay that allowed for a quickly booked, extended holiday (one to three months).

Older travellers interviewed were using a combination of lodgings, including time at backpackers' accommodations (100%), with friends and family (56%), at YHAs (6%), motels (12%), bed and breakfasts (6%), and DOC tramping huts (31%). This study obviously supports the Ministry's definition of backpackers as those who spend at least 30% of their time at backpackers' accommodations (MOT, 2005). However, it is somewhat different from Newlands' findings. For his over 35 age group, only 11.3% also stayed with friends and family, less than 10% used other hotels/motels, B&Bs, or campervans, and only "a few plucky individuals slept ... in huts" (Newlands, 2004, p. 233). Percentages indicate that more of this study's participants stayed with friends and family and in DOC huts, but as the overall number of participants was limited it is difficult to generalise.

Three interviewees earned less than \$50,000 per year (unless otherwise noted, all dollar amounts are in New Zealand dollars, valued at approximately \$US .75 at the time of research), and these three were on the longest trips involving more than one destination country. Through in-depth questioning, they showed themselves to be Cohen's true *adventurers*, long term budget travellers who have chosen to travel almost full-time. Three interviewees retired early to travel, a trade-off of economics versus freedom. One is on leave from his teaching post, a sabbatical he takes every two or three years.

Eight individuals earned between \$50,000 and \$75,000; three earned more than \$75,000; and two earned over \$100,000 annually. The two who earned most were the least travelled internationally other than for work.

Newlands' (2004, pp. 223-224) study of NZ backpackers revealed high levels of education; this research extends those findings, with 15 of 16 subjects having obtained at least university degrees. While 53.7% of Newlands' backpackers earned less than \$US 20,000 per year, 10.7% earned \$US 20-30,000, 7.1% earned \$US 40-50,000, and 28.5% earned over \$US 50,001. An extensive study in Australia revealed that 17.8% of backpackers earn more than \$AU 100,000 (Research Works, 1999). The data for the age group of the current interviewees shows significantly higher annual earnings as well, more closely reflecting baby boomer economics than those found in other backpacker studies, potentially suggesting the need to differentiate this market by age in future studies.

Participants in the current research ranged in age from 42 to 63 years, with an average age of 52.8 years. Two individuals were native New Zealanders, but of the remaining fourteen travellers, seven were spending their entire holiday in this country; five considered New Zealand their primary destination, and only three considered their travels in New Zealand to be a relatively short part (28%) of their overall trip. As noted in Figure 1, three individuals in their 40s were travelling an average of 147 days, with 54 of those days spent in New Zealand. Eight people in their 50s were travelling for an average of 99 days, spending 96 days of that time in this country. Three individuals in their 60s were travelling for 99 days with 39 days average in New Zealand. The overall average length of stay in New Zealand for the interviewees was 76 days.

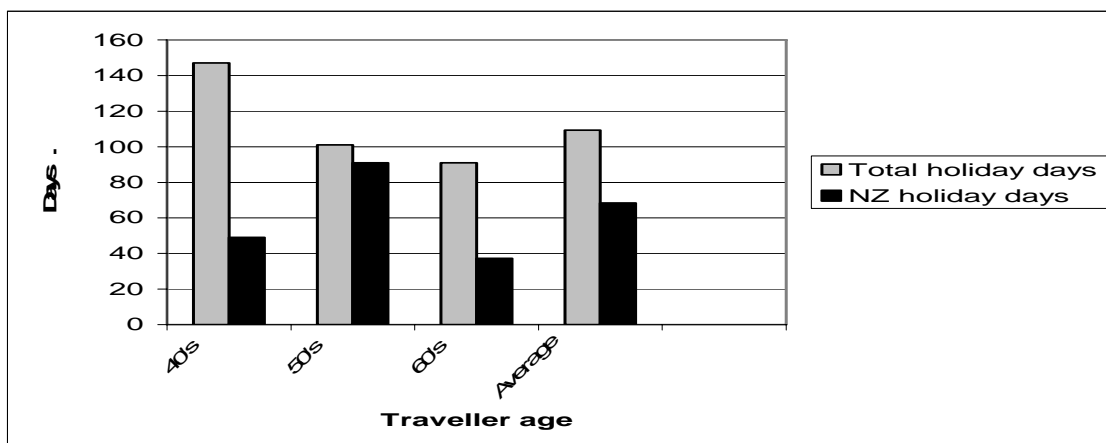


Figure 1: Older backpackers' holiday timeframes, by age. (*n* ~ 14)

Additional data were collected from the respondents to the exploratory survey (Table 2). The 54 tourists surveyed, of similar demographics to the older backpackers, are referred to as “baby boomers” or “respondents” in the findings.

Table 2: Demographics of baby boomer tourists (*n* ~ 54)

Nationality	No. of Respondents	Ave. Age per Nationality
Australia	4	59
Belgium	1	60
Canada	5	58
France	1	63
Germany	7	52
Holland	2	57
New Zealand	4	56
Scotland	1	62
England	19	60
United States	10	62
totals	54	59

The baby boomer tourists surveyed in Auckland were similar to the older backpackers in nationality (European or North American), but were older on

average (59 years versus 52.8 years) and were here for significantly shorter holidays. Their average length of time in New Zealand was 23 days (Figure 2).

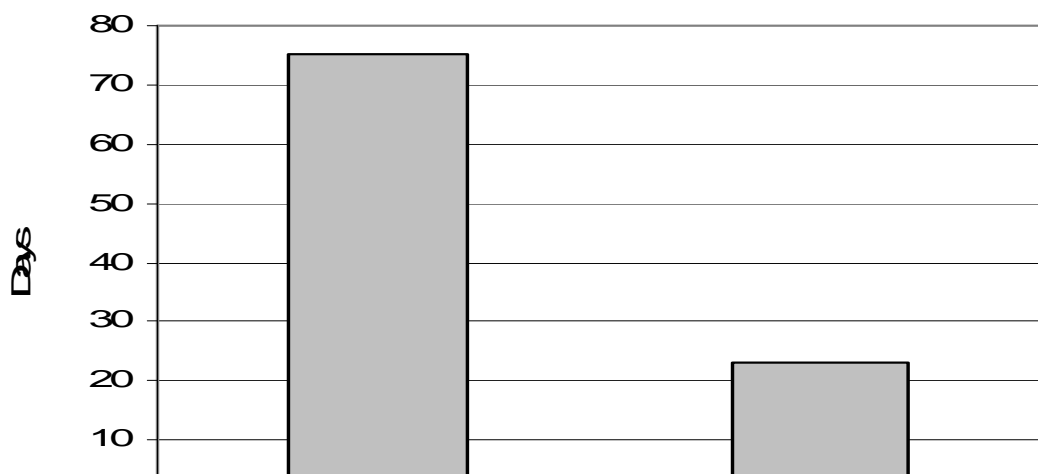


Figure 2: Comparison of older backpackers (BP) ($n \sim 14$) with baby boomer tourists (BB) ($n \sim 54$): holiday timeframes

These findings generally reflect Ministry studies that indicate backpackers stay longer in New Zealand (an average of 30.5 days) than do non-backpackers (an average of 19.4 days) (MOT, 2005). However, the older backpackers interviewed averaged 76 days in country, more than twice as long as their younger backpacking counterparts.

Of the non-NZ subjects, 71% of the older backpackers interviewed had been here before, whereas only 18% of baby boomer respondents had been to New Zealand previously. Both these data sets differ from the Ministry's findings that 51% of international arrivals are return visitors (MOT, 2007b). As 8 of the 14 backpackers were also staying with friends or family at some point on their holiday, it implies there might be a cross-over opportunity between traditional VFR markets and backpackers' accommodations.

Perceptions of self

One of the most significant opportunities presented by qualitative research is to hear the actual voices and opinions of the interviewees – how they perceive of themselves, of the world around them, and their own places within it. Distinct

data about perceived age, self identification, and personal travel motivations emerged.

Perceived age

Research has attempted to tie peoples' physical ages to their psychological or cognitive ages, as is already discussed in Chapter two. Sociologists suggest that the average cognitive (versus physical) age difference is between 10.2 years (Cleaver & Muller, 2002) and 12 years (Mathur et al., 1998). Cleaver and Muller (2002) further suggest that this difference increases as people age, a theory that is supported by this study. Interviewees voiced an average age difference of ten years for those in their 40s, fourteen years for those in their 50s, and sixteen for those in their 60s. Overall, the subjects perceived of themselves as averaging thirteen years younger than they actually were. More specifically, almost all subjects aged 50 and over identified with being in their "early to mid forties" before they were encouraged to choose a specific year or age. Only one respondent says that he feels exactly his own age, and that he is "comfortable with that".

If perceived age is the age one feels, it is also, for these individuals, the age they were *acting*. Whether 42 or 62, the older backpackers pursued similar diversions – similar hikes, kayak trips, museums. The research uncovered no significant differences within this twenty-year age span for activities undertaken and attitudes about travelling in New Zealand. In fact, the research suggests support for the developing belief that this age cohort is "age neutral" (Peterson, 2007; Stroud, 2005).

Self-identification

Richards and Wilson (2004a, p. 11) note that "definitions are externally derived and the 'backpackers' themselves are rarely asked if they see themselves as backpackers or not". When baby boomer backpackers in this study were asked how they would define "tourist", "traveller", and "backpacker", distinct patterns emerged. It would appear that, for them, "tourist" most closely relates

to Cohen's (2004c) terms *organized mass tourist* and *individual mass tourist* – people travelling within fairly controlled “environmental bubbles”. Several contextual patterns emerged that centred on three key words: sights, money, and time. The comments reflected these subjects' views that tourists had specific sights they had to see, that they had more money than do other travellers (specifically, more than the interviewees themselves), and that they had less time to spend on their holidays. For example,

They DO Thailand; they DO the beaches. 'Tick box travelling', we call it (Edward).

Tourist – somebody who's come for a shortish amount of time. They may wish they had longer, but they want to say they've been to see 'Milford Sound' or other 'must see' things and places (Louise).

No one interviewed perceived of him- or herself as a tourist, though one woman admitted, “I don't consider myself a tourist, but I *am*, of course” (Birgitta). This, despite the fact that some of the individuals responding were relatively new to travel themselves, and on relatively short trips (3-5 weeks). One woman, who meticulously pre-plans and pre-books every detail of her four to five week trips, still avoided the self-definition of tourist (Helen).

These findings are similar to research involving primarily younger backpackers. The “tourist” label is most popular amongst those under age 20; well-travelled respondents used that term least (Richards & Wilson, 2004a). However, unlike Richards and Wilson's study, in which almost 64% of people referred to themselves as a “backpacker”, no one in this research was comfortable defining him- or herself as such.

The girl where I was buying my ticket asked, 'Are you a backpacker?' And I turned slowly and looked behind me, but there was no one there. So I said, 'I guess I am' (Brian).

Even though these people were using backpackers' accommodations, the word “backpacker” was difficult to relate to, identified primarily with age, inexperience, and “someone who travels as cheaply as possible” (Helen).

A backpacker is defined by a particular age group, not over age 30. It defines itself as being about young people, just by that term (Catherine).

[Backpacker] does have a stereotype with it. Young, inexperienced travellers, I suppose. Though no one here is (James).

A younger guest offered the harshest assessment of backpackers:

The young backpackers, they say they're 'travelling' to sound like they doing something important. But they're really just moving around one country to the next, pissed out of their minds all the time (Australian woman, age 27).

The interviewees perceived of themselves as “travellers”, “independent travellers”, or “budget travellers”, and used words that reflected meanings of time, flexibility, and spontaneity.

People who have the luxury of a bit more time, if not money, and will hopefully be more flexible. They may well have pre-booked some things, but will be trying to feel a bit more of the flavour of the country and the culture. They may not feel like they have to go out and do certain things each day (Louise).

People who are totally uninhibited about spontaneity – the joy is in NOT knowing exactly where they'll be at the end of the day (Rita).

Again, a significant contrast between this study and that done by Richards and Wilson (2004a) may be the age differences of the subjects. Only five percent of the 2004 study were over 30 years of age, which may have a bearing on self-definitions.

Older backpackers' motivations and experiences

Five of the backpackers interviewed are very well travelled, with substantial time spent over the years in the developing countries of Latin America, South East Asia, India, Africa, and Russia. Six have travelled extensively, including trips to destinations in Europe, the United States, and Australasia. This was no one's first trip. This data is in contraction to Newlands' research findings that his respondents “did not appear to be particularly experienced travellers” (2004, p230), but it is important to note that 91% of his respondents were less than 35 years of age. This study does, however, support Richards and Wilson's (2004a)

conclusion that older backpackers have travelled more than most of their younger counterparts. This is perhaps a simple factor of time – the older backpackers have had more years available to them to accrue travel experiences. However, it is important to note that more than half the subjects began travelling only in later life, once their own children had left home.

Four individuals were experiencing New Zealand for the first time. The balance were here for either their second or third holiday. Eight subjects were here, in part, to visit friends or family as well as to travel on their own, but they intended to spend less than half their time with those they knew in-country. New Zealand's "nature" and "natural beauty" were the prime attractions that motivated these travellers to choose this country.

None of the interviewees indicated that this holiday served as a major life transition for them, or that a significant life event had occurred that prompted their travels, unlike the middle-aged Israeli women Maoz (2007) studied in India. None of the older backpackers visiting primarily New Zealand spoke of this as a particularly challenging or spiritually fulfilling trip, though two individuals on longer journeys (India and Latin America in addition to Australasia) did speak of challenges at other destinations. New Zealand is considered an easy, safe, beautiful country to visit for a relatively simple and affordable holiday. As one commented, "It's a way to get out of ugly northern winters, meet new people and see new sights" (James).

These findings counter much of the current backpacking literature, possibly reflecting a significant difference between younger and older travellers. The older backpackers do not perceive of their voyages as *rites of passage* (Turner, 1973). Most are well travelled enough to not be significantly challenged by New Zealand, as indicated by the percentage that did little pre-arrival research (see 5.2.1). Unlike Elrud's (2001) subjects, they do not construct narratives of risk or adventure to justify their travels. Instead, as Scheyvens (2006) found, they are travellers intent on having an interesting, affordable holiday. They combine inexpensive accommodations with occasional expensive tours or experiences

(dance workshops, or music festivals, or multi-day sailing excursions). Two travellers flew to New Zealand in business class, then stayed in backpackers' accommodations. The older travellers are Urry's *post-Fordist consumers*, mixing and matching experiences to suit their own whims.

These travellers varied significantly from existing studies of primarily younger backpackers in three additional ways: first, many were intent to "see the sights"; second, none were interested in the contrived and commodified "hard adventure" that NZ has become famous for – bungee jumping, jet boats, parasailing, etc.; and third, most were more committed to getting to know locals rather than their fellow travellers.

Backpacker literature offers many examples of younger backpackers nominally eschewing the "normal" tourist routes and iconic sights or even claiming that they had visited such landmarks "by mistake" (Uriely, Yonay, & Simchai, 2002). Additional research, though confirming this, contends that certain tour operators are offering similar products and services but are better at positioning themselves as "green" or "adventurous", thus creating a similar but parallel market for backpackers' tours (Ross, 1992). The current research, however, did not find strong resistance from older backpackers interviewed to visiting iconic New Zealand attractions – for instance, experiencing Rotorua's thermal wonders, or boat touring Lake Wakatipu or Milford Sound. Interviewees for this research wanted to visit those and more – for example, they wanted to take a cruise on Milford Sound, but also to walk the Milford Track.

However, there was resistance offered by these older travellers to the *commodification of risk* as expressed by Elsrud (2001) and Binder (2004). They wanted to kayak and sail, not jet boat. They wanted to tramp (hike), not bungee jump. They wanted to go snorkelling, not parasailing. Several expressed dismay at how commodified experiences and adventures have become in New Zealand.

People were in hyper mode in pushing activities. I know that's how people make money, but it was all this adrenalin rush stuff – take an airplane ride and skydive down to a lake to jet ski out and meet your hummer to

ride to a jet boat to roar down a river to meet your evening lake cruise. The high-power / high-fuel usage was nauseating. New Zealand offers so much without all that (Rita).

It's changed very much, especially in the South Island, where it's very much in your face, "You are a tourist, let me sell you a package, let me sell you a tour" (Louise).

An additional difference between these interviewees and younger backpackers is the interest expressed in getting to know local people and cultures. Four women engaged the interviewer in specific discussions about how to meet and interact more with locals, particularly to explore the Maori culture. They wanted to move beyond the "superficial" interactions they had experienced at major tourism sites like Rotorua. Three of these had gone to small communities in Northland or along the Eastern coast to stay for a period of days with Maori families or on a *marae*.

Connection with locals appeared more important to most interviewees than did daily interactions with fellow travellers. While the data showed clearly that most older backpackers enjoyed social interaction with their fellow travellers, no interviewees implied that these relationships were a primary attraction or motivator. These older individuals did not change travel plans to travel with others, or to "hang out" for additional days specifically to get to know one another better. This is distinctly different than research emerging from younger backpackers, who appear to be as intrigued by their peers as by the foreign cultures around them (Murphy, 2001; Richards & Wilson, 2004a).

Cohen's (2004a) touristic modes of experience are situated within the continuum of seeking travel experiences that are *recreational* (inauthentic, but entertaining), *diversionary* (escapes from boredom, but not meaningful experiences of themselves), *experiential* (observing the lives of others, but not engaging deeply with them), *experimental* (engaging with others' lives, but not committing to their realities) or *existential* (fully immersing in a different culture and moving away from one's own). The subjects in this research fall within in the middle of Cohen's continuum. They are concerned with authenticity, and attempt to engage with both the natural environment and cultures of New Zealand in a

meaningful way. Several are open to participating in experimental opportunities to join in with the peoples they're visiting, but realise that those are finite experiences. These are still, after all, people on holiday; they are not seeking new spiritual or cultural centres of being.

Six subjects expressed some degree of alienation from their home societies, though all fully intended to return to them shortly. All of them indicated that New Zealand is an earlier, kinder version of their own countries. One said, "It reminds me of Ireland 15 years ago, when it was more friendlier [sic]" (Brian). A Scottish man added, "New Zealand is a more Christian country – people here are more kind towards each other, and more loving, than in other countries" (James).

International perceptions about backpackers' accommodations

The importance of naming a business properly is highlighted by *The Wall Street Journal*, which explains, "There's so much riding on a company's name...and the pitfalls are many. A bad name can fail to engage customers, or become outdated as the company grows and adds products and services" (Barlyn, 2008).

The backpacking industry is faced with a similar conundrum. Welk (2004, p. 89) notes that for budget travellers, "anti-tourism has given way to anti-backpacking...the term 'backpacker' is already in decline, and the use of '(independent) traveller' is back in vogue. Not even 40 years old, and the scene is going through a major identity crisis".

It would appear that, just as the nomenclature of "backpacker" is not a comfortable term for the older travellers currently using these facilities, "backpackers' accommodations" – used by the interviewees interchangeably with "hostels" or "youth hostels" – has a similar identity problem. The terms have not evolved at the rate that the industry's services and facilities have in New Zealand, leaving both guests and the general public with inadequate frames of reference. Older backpackers themselves note consistently that backpackers' accommodations in this country are "*a totally different experience*",

but their pre-formed imaging about backpackers' accommodations and hostels, created by experiences in the US and Europe, are negative. Words that come up consistently about international facilities are "cheap", "dirty", "grubby", "grotty", and noisy".

In Germany, we don't have much [sic] backpackers [accommodations]. They're just youth hostels and people of my age remember how it used to be: they close at ten o'clock, separate dorms, wardens. It's like in the military. It's the reason a lot of people our age have the wrong impression (Heinrich).

I think for many people backpackers is synonymous with youngsters, typically Europeans in their gap years – late teens, early 20s – and a lot of people expect that backpackers will be filled with a lot of drunken people in this age.... [Partly] it's the word 'youth' – you don't see yourself staying in one, do you (Louise)?

The least negative comment was from a Swedish subject, who said,

We have about the same standard in Sweden, but they all look alike. The same curtains, the same beds – they're identical. It's easy for finding your way around a kitchen or bathroom, but boring. And they're expensive (Erich).

Australia's private backpackers' accommodations, and even its YHA, are potentially contributing to the image problems New Zealand's industry faces. Two different hosts told the researcher that the facilities in Australia offered significantly lower quality than in this country; several travellers concurred.

I used YHA there, because I expected a standard, but it was the most shocking experience I'd ever had. The facilities were crap, you didn't see the people at all who run the place (they don't even live there!). ...I can tell you, if it had been visa versa [Australia before NZ], there's no way in hell I'd use backpackers here (Kim).

The 54 baby boomer tourists surveyed for this research were chosen by their apparent age and general touristic appearance, but six had actually used backpackers' accommodations on at least one night of their New Zealand holiday. These six individuals used words like *friendly, informal, budget, sharing, freedom, great, and nice* to describe their experience. The other 48 survey respondents, travellers who knew the word "backpackers", but had no personal

experience with this type of facilities in this country, used both more pejorative language and tones of voice when asked what “backpackers’ accommodations” meant to them (Table 3).

Table 3: Baby boomer tourists' definitions of backpackers' accommodations (n ~ 48)

Comments	Number and types of comments made
younger / youngsters / students	27
cheap / inexpensive / low cost / budget	15
dorms	7
tramping / walk with pack / roughing it*	6
used by inexperienced [travellers]	4
unfriendly / hard to relate to youngsters**	4
communal living	3
basic / "bare bones" facilities	3
for international / foreign [visitors]***	2
used when younger	2
bags on backs	2
"we don't have to do that"	1
"for those who can't afford better"	1
camping / tenting***	1
meet other people	1
I'm too old	1
different meaning in the US*	1
for those on long trips	1
reasonable	1
good for all ages	15
* US's responses. Backpacking means hiking or tramping with camping gear in the US.	
** all relating to AU backpacker accommodations that the commenters had tried. NONE were now using NZ backpackers.	
*** NZ's responses.	

Because people perceive that there are no parallel service or facilities in Europe or the US, the backpackers' accommodation industry in New Zealand may have an image problem amongst potential users. This is not to contend there are no

international parallels. Scotland, for instance, has a rapidly expanding private and not for profit hostel system that offers similar facilities and services (Cave et al., 2007; Robb, Frew, & Brennan, 2002; Thyne et al., 2004).

It is noted in the literature review that the term “backpackers” apparently arose in Australia in the early 1980s, perhaps to counter the existent negative image of state-controlled youth hostels in that country (McCulloch, 1992). The term “backpackers’ accommodations” has, in turn, now potentially attained a similarly negative, and limiting, connotation. This might affect different potential user groups, both young backpackers, as discussed by Ateljevic and Doorne (2000b) and, this research demonstrates, older travellers as well.

Why choose backpackers’ accommodation?

Given international impressions of backpackers’ accommodations, why would any older travellers choose them? New Zealand has an excellent array of inexpensive motels (ensuite, with simple kitchens) and B&Bs, as well as holiday parks with small private cabins, and a growing campervan industry. What do the small, private backpackers’ accommodations offer, and what are the primary motivations to use them?

Available facilities

All but one of the eight accommodations reviewed for this thesis are lodgings of fewer than 30 beds; all employ five or fewer people. The facilities of each are quite similar (Table 4), but each is unique in its character and personality. Many are old homes that have been converted, restored, or added onto. Only two are purpose-built. These eight individuals interviewed are referred to as “backpackers’ accommodation owners” or “hosts” in these findings, or by the identification number assigned to each.

Table 4: Backpackers' accommodations: facilities on offer

BP ID	Dorms		Rooms		Kitchen	Common Room	Outside Areas	Quiet / Study	Internet	TV	bikes, kayaks, etc available	Travel info available
	sm	lge	priv	ensuite								
101	x		x	x	x	x	x	x	x	x	x	x
102		x	x		x	x	x		x			x
103		x	x	x	x	x	x		x	x	x	x
104		x	x		x	x	x			x		
105		x	x	x	x	x	x		x	x		x
106	x	x	x		x		x	x	x	x	x	x
107	x	x	x	x	x	x	x			x	x	x
108	x	x	x		x	x	x		x	x		x

The motivations cited for older travellers choosing backpackers' lodgings fall consistently within the two primary reasons originally offered by Pearce in 1990: price and social interaction.

Price

The affordability of these budget accommodations was the main influence in choice for 88% of the interviewees. It was especially important to those on longer trips, those who earned less than \$50,000 per year, all but one of the solo travellers, and both of the New Zealanders interviewed.

We're travelling on a pretty limited budget, we can't afford big hotels or resorts. We knew this was the only way we could travel for the lengths of time we wanted to and still afford it. We had money, but it wasn't limitless (Catherine).

Conserving their travel funds by using backpackers' accommodations allowed the older travellers to meet other goals.

I'd rather spend money on environmentally friendly trips – the Franz Josef Glacier climb, or a marine-related trip (Kim).

I can rent my flat in Edinborough and just stay [at backpackers]. The paycheck is as good as in the bank. I'll go back richer (James).

The luxury is time. So if you can have good, safe, clean, comfortable accommodation at a reasonable price then that leaves money to travel longer, or to buy tickets for the theatre or cruise or train or what have you (Louise).

Price and affordability were also expressed as *value* by many of the participants – that the backpackers offered a *good value*, or that *added value* of these accommodations was beyond just price.

The hosts interviewed universally confirmed the reactions of the older backpackers. They believe that older travellers are now travelling in greater numbers and for longer periods of time.

They have money, but this way they can stretch it out longer. They can get their en-suites, and private rooms and different nationalities and age groups too. It makes them feel younger as well – they're mixing with all these people and they're all on the same level (105b).

The data demonstrate that older travellers using this form of accommodation do, indeed, fall within Pearce's (1990) initial finding: that a distinct preference for budget accommodation is the most clear definition of backpacker. It supports research on New Zealand's YHA guests that indicates that over half choose backpackers' accommodations / hostels because of price (NZTRI, 2005). More importantly, this research supports Riley's (1988) comment about budget travellers, that that label does not imply people of limited socio-economic backgrounds but rather people who chose to extend their holidays by living on a budget. In addition, it offers confirmation for Peterson's (2007) finding that economic variables such as income and assets have a far greater impact on vacation choices than does age.

Social interactions

The opportunity to connect with others was the other significant reason for choosing backpackers' accommodations, as cited by 69% of interviewees. Comments emphasised the pleasures of interaction, including communicating with others, sharing a glass of wine or a meal, and talking about journeys through New Zealand and beyond.

The most guarded comment heard was from a woman who stated that she does not typically choose social interaction.

It's not something I actively seek to do. I've been surprised how it's actually interesting though, when you let your guard down and you find you are in conversation with other people.... I kept bumping into the same people every few days. I actually found that extremely rewarding in a way I'd never anticipated (Helen).

Younger backpackers often exchange information about the best “deals” or “values” on the road to garner prestige (Riley, 1988; Murphy, 2001). None of these conversations was heard from older backpackers; no comments about bargain hunting or deal making were made, even from travellers who had been through India and Southeast Asia. Conversations however did reflect Welk's (2004) “insider's tips”: travellers trading information on “off the beaten track” experiences only with those they truly like, possibly a parallel form of status enhancement. Research subjects exchanged information with other guests as well as the researcher about the “nicest” places to stay and “most interesting” experiences they had had.

Age-related attributes and their impact on travellers' preferences and interactions have been studied extensively (Lieux, Weaver, & McCleary, 1994; Muller, 1997; Shoemaker, 1989, 2000). A body of work is coalescing that indicates that the baby boomer cohort is relatively age-neutral (Stroud, 2005; Patterson, 2006). This research appears to support that theory, at least for the types of people who choose to engage in the nature-based, culturally and socially interactive holidays that typify a New Zealand backpackers' holiday. Most of the older backpackers enjoyed the multi-generational atmosphere.

It gives us the chance to interact with younger people that we don't normally have – it's really important for us, and for them too, I think (Wally).

Backpackers come from all walks of life, all ages thrown in together, all talking enthusiastically about what they've seen and done (Betty).

There was some concern expressed by older backpackers about how the younger travellers would feel having older people present. But the few younger

backpackers who chimed in voluntarily, instead emphasised how enjoyable the multi-generational ambience was.

People here are older, more mature, actually interested in what you really have to say. I really like that (Spanish man, 30).

Yes there are older people, but they aren't my mother or father, so what do I care? I can talk to them, one adult to another, and get different points of view (German woman, 24).

Interviews with the owners of backpackers' accommodations strengthened this finding. In response to questions about the impacts of having older guests present, the backpackers' accommodation hosts confirmed the multi-generational camaraderie, insisting that everyone "gets along famously". As one man put it,

All the older backpackers here are young. They're ALL young (105b).

Two additional data insights were collected that were not part of the research scope of this thesis, but are presented here as having potential marketing implications. Several hosts expressed resistance to long term stay guests (typically those on work holiday visas who take up residence at backpackers for weeks or months). Only one of the accommodations' owners interviewed allowed long term stays, contending that, especially off-season, these working guests helped subsidise operations when beds would be otherwise empty.

All other owners stressed that they would not accept long stays, for the reasons noted by an earlier Australian study: the long-stay working backpackers "tended to form cliques and be less willing to engage in the expected conversation rituals with new arrivals" (Murphy, 2001, p. 64). Three hosts in the current research also cited examples of long stay guests becoming resentful and proprietary of "my space", "my chair" or "my favourite cup".

Insights into hosts' perceptions of New Zealanders as guests were also gained. The Cave et al. (2007, p. 336) study suggests that "a significant portion of backpacker accommodation is used by domestic New Zealanders". New

Zealand government statistics indicate that 31% of users are domestic (MOT, 2007a). YHA studies have shown that 12% are domestic visitors (NZTRI, 2007).

The current study showed variations in domestic usage. One owner estimates that 30% of his clients are domestic. One says she has none. Two have return visitors whom they look forward to hosting each year, particularly over the Christmas holidays.

However, four owners actively discourage New Zealanders from booking their accommodations, with one stating that,

Our worst clientele are Kiwis. If New Zealanders want to stay at a backpackers, we really question it. All the troubles we've had over the years have been from them. Everyone here has friends or family in most every town. Those who don't have someone they know to stay with aren't the kind of people you want (104).

An Auckland accommodation owner said,

It's a problem; they just don't respect the place. If there's any major trouble in our hostel, it's caused by or a New Zealander is in the middle of it. Both older and younger. The older ones are often alcoholics or have mental problems. The younger ones come for a cheap place to stay to party for the weekend and go to concerts (108).

From a marketing point of view, this perception is unfortunate, given the comments of the New Zealand backpackers – both professional women – interviewed for this research. One commented that staying at backpackers, where she was the only Kiwi present (“I became quite a novelty, which stunned me”), had been enjoyable and she would encourage others to do it as well.

You're not only going to see your own country, but you're going to be a valued ambassador – people will love you, and will ask you all sorts of questions. 'What shall we see, what shall we do?' (Kim).

Accommodation of choice

While price created the initial impetus to stay in backpackers' accommodations, the overall experience induced continued use. One of the semi-structured questions asked of older backpackers was whether these lodgings would be

these travellers' accommodation choice "if money were no object". Several laughed, and said that they'd prefer five star resorts, but most then said that actually, that wasn't really true either – one commented, "I don't know if I'd really upgrade; I don't think so. It's about meeting the people really" (Brian). The individuals who could most afford more expense (with incomes of over \$100,000) chose these accommodations anyway. In fact, twelve of sixteen interviewees said they would choose a backpackers' accommodation first.

We couldn't find a room one night in "x", and checked out a small backpackers there – a private room, lovely kitchen and living areas, great people, free kayaks. We were completely taken with the experience and have used them ever since (Wally).

You find the same comfort and facilities as you would for double or three times the price. These are in attractive locations, quite often possibly more so than the hotels – again, there's that kind of blandness of hotels (Edward).

I prefer these because there's always a personal touch, maybe good maybe bad, but personal (Erich).

Several mentioned that B&Bs would be their other choice, but that they were too 'fluffy', too 'pricey' for value. Two people mentioned that it would be too much like staying in someone's home, and that would make them uncomfortable. One interviewee who actually owns a B&B said, "backpackers are more self starters; B&B clients expect to be waited on. They're not truly as social as people here" (Paul).

Only one individual, a woman who preferred limited social interaction, would stay only in motels or hotels if she could afford it. She commented, "I have more problems when I stay in B&Bs, when I'm expected to interact with people, or they recommend things for me to do. I like my holiday to be under my control" (Helen).

These older backpackers fit Pearce's (1990) broad definition: they express a definite preference for budget accommodation (the immutable criterion). In addition, they enjoy interacting with other travellers, they are independently organised and on flexible schedules; most are on longer rather than very brief

holidays, and most prefer participatory and informal activities. The one major exception to the last four points is Helen, though she still chose backpackers' accommodations because of budget.

More importantly, this research has borne out Pearce's original statement that,

Backpacking is best defined socially rather than in economic or demographic terms. Being a backpacker is an approach to travel and holiday taking, rather than a categorisation based on dollars spent or one's age (1990, p.1).

Uriely et al. (2002, p. 522) offer distinctions between *form* (institutional arrangements and practices) and *type* (intangibles such as motivations, attitudes, and meanings assigned) attributes of tourism. They contend that backpacking is a form of tourism, rather than a type, as individuals' motivations, attitudes, and even behaviours can vary dramatically from one another as well as from one moment to another within the same journey. While the older backpackers in this research are committed to the *form* of backpacking, their motivations and behaviours do, indeed, vary. In sum, this research supports the notion that, while "backpackers conform to the conventional forms... they comply with the different modes of tourist experiences suggested by Cohen [in] 1979 (Uriely, 2005, p. 205). In sum, the research concurs that backpacking should be regarded "as a form rather than a type of tourism" (Uriely, et al., 2002, p. 520).

The findings also offers support for Pearce's (2005) hypothesis of *travel career patterns* modelled after Maslow's hierarchy of social needs, positing that, as travellers become more experienced, they will move away from recreational and diversionary modes of tourism and into more experiential and connective modes. All travellers respond to the "backbone" of this TCP – basic motivational factors related to *novelty, escape/relax, relationship building, and self development*. However, travellers with less experience tend to pursue self development through personal enhancement while well-travelled individuals pursue self development through host-site involvement such as experiencing different cultures and local people (D. G. Pearce & Schott, 2005, pp. 235-236).

Yeoman et al. (2007, p. 187) further suggest that, as travellers become more experienced, they will chose inconspicuous consumption over status-driven consumption. "The importance of this scenario reflects cultural capital being driven by educated, well-travelled consumers who are more concerned with experience than with material possessions. They have a comfortable lifestyle (although price-sensitive) and prefer inconspicuous consumption; they have active minds and need intellectual stimulation; they have broad horizons and travel to see many different cultures, hence their liberal attitude to life". Through their chosen travel patterns, older travellers who choose backpackers' accommodations are, perhaps, the true nomads from affluence.

5 Needs, usage, and industry response

This thesis seeks to extend current knowledge of older travellers' needs and preferences in backpackers' accommodation. Obernour, Patterson, Pedersen, and Pearson (2006) suggest that deeper insights about preferences and needs can be gained through qualitative analysis of respondents' "rich, contextual voices". These findings provide that depth, offering selected, representative comments from both the guests and hosts to elaborate on already published quantitative research. This chapter's findings and discussion focus on the following research questions.

- What are the needs and preferences of older travellers?
- What are their research and booking patterns?
- What has the industry response been vis à vis both facilities provision and marketing?

Needs and preferences of older travellers

What do travellers expect from their accommodation choices, and how do they measure satisfaction? Nash et al. (2006, p. 526) suggest that "customers will be satisfied if the services they receive are at least as good as they were supposed to be", noting that there are elements of expectation associated with such services. Cave et al.'s (2007) study quantitatively compares the needs and satisfaction ratings of younger (under age 30) and older (over age 30) backpackers at hostels and backpackers' accommodations in New Zealand and Scotland. They conclude that "expectations of backpacker / hostel accommodation appear to be changing from the communal, cheap, 'just a bed' option that it was once believed to be to something more in line with the accommodation experience of the mainstream tourist" (2007, p. 364). Their study finds that, in New Zealand, older backpackers are only somewhat more demanding of basic amenities than are their younger peers. This is similar to Moshin and Ryan's (2003) findings that

older backpackers are more demanding of accommodations than are younger ones.

Attributes expected by Cave et al.'s (2007) New Zealand respondents include clean rooms, private showers and toilets, self-catering / cooking facilities, washing facilities, a TV room, a quiet / study room, and lots of travel information (versus booking services). New Zealand respondents appeared to demand and expect more from backpackers' accommodations than did Scottish respondents who were, above all, interested in cheap, quiet, clean rooms. Conversely, a study of just YHA guests implies that price is more important than cleanliness (NZTRI, 2005). Canadian hostellers ranked cleanliness, location, personal service and security as most important (Hecht & Martin, 2006). One US study recommends large kitchens and carefully considered arrangements of private and public spaces within hostels to optimise interaction amongst travellers (Obenour et al., 2006).

Using a combination of qualitative interviewing and on site observation, the research uncovered specific preferences regarding sleeping facilities, kitchens, communal spaces, accommodation sizes, location and safety. The facilities used are detailed in Table 5.

Table 5: Backpackers' accommodations: facilities used by interviewees

ID	Dorms		Rooms		Kitchen			Common Rm	Outside Areas	Quiet / Study	Internet	TV	Used bikes, kayaks, etc	Travel Info appreciated
	sm	lge	priv	ensuite	B	L	D							
Ken		x			x		x	x	x		x			
Helen	x	x			x		x			x	x	x		
Ingrid			x	x	x		x	x	x	x			x	x
Brian			x				o	x	x		x	x	x	
James			x	x	x	x	x	x	x	x	x		x	x
Heinrich			x	x	x			x	x			x		x
Birgitta	x	x			x		x	x	x	x	x		x	x
Betty			x		o	x	o	x	x			x		x
Paul			x		o	x	o		x	x				
Kim	x	x			x		x	x	x	x	x		x	x
Rita			x	x	x		o	x	x	x	x		x	x
Wally			x	x	x		o	x	x	x	x		x	x
Erich			x	x	x	x	x	x	x	x	x	x		x
Catherine			x		o		o		x	x	x			
Edward			x		o		o		x	x	x			
Louise	x	x			x		o	x	x	x	x		x	x

x - Frequent use.
o - Occasional use; also dine out, particularly if kitchen cleanliness a concern.
All respondents who use small dorms will use large if needed.
All respondents checked for both private & ensuite will use either available.

Sleeping facilities

Most of the backpackers' accommodations and youth hostels across New Zealand offer a combination of dormitories and private rooms. All eight of the sites selected for this research do so. Importantly, seven hosts interviewed are moving towards additional private facilities, even though at times they reduce overall bed count to do so.

We just converted a dorm to two double rooms. Ninety percent because of demand, and because we wanted to quiet down a little bit. We're gaining a better lifestyle; we'd rather have two couples than six individuals.... Financially a bit of a step backwards, but in high season, it's easier (106).

In this research, couples exclusively used private rooms, either with ensuite or shared bathrooms. Of these, none would rule out staying at a facility where an ensuite was unavailable, though four women mentioned that they would inspect the shared bathrooms before checking in. Half of the backpackers' accommodations reviewed had ensuites. Two owners had just recently completed additions of ensuite rooms and "they've already booked out two

months in advance in high season” (101). One owner made an intriguing observation:

I suppose I lose business without them, but ensuites cost so much more money, not just in the building of them, but in their maintenance. I mean, shared bathrooms have to be generally tidy and clean, but a private toilet has to be kept absolutely spotless (102).

Hecht and Martin (2006) also found that many older (“contemporary”) backpackers wanted additional room choices, notably private rooms, and were willing and able to pay for them. They comment, “as the age of the respondent increased so did their budgets for accommodation” (2006, p. 74).

Solo travellers used backpackers’ accommodation as the most affordable lodging alternative. Several pointed out how expensive a motel or B&B is for single travellers, and how few offer single rates. Three solo travellers used only private rooms. Five solo interviewees used dorms, and particularly appreciated smaller dorm rooms. Dorms, in the past, often had 12 or more (bunk) beds in a single room, with little remaining personal space to organise, dry towels, and store belongings. Most properties affiliated with BBH offer both “share” (up to four people) and dorm rooms.

I don’t mind at all sharing kitchen and bathrooms, but I don’t want to be in a mixed dorm with 25 other people coming and going at all hours of the day and night (Helen).

Here [at this accommodation], it’s only four people, and you have your own shower and toilet for the room. It’s really nice (Birgitta).

NZTRI (2007) indicates similar responses, finding that “four share rooms” were requested by 29% of YHA respondents, double rooms requested by 16%, and “six share rooms” requested by 11%. Only 2% chose the larger twelve share dorms. Mohsin and Ryan (2003) concur, encouraging accommodation providers to replace communal dorms with smaller, ensuite rooms. However, Cave et al. (2007) also find that larger communal rooms are still sought by the under 30s and by backpackers in Scotland. They postulate that the desire and need for cheaper accommodations outweighs the need for privacy for these market

segments. It is important to note however that their study apparently did not ask questions that differentiated between smaller and larger communal facilities.

Obenour et al. (2006) suggest strategic placement of travellers in dorms to maximise their social interactions, noting that single travellers often feel excluded in dorms where couples or friends are already staying. Both the Hecht and Martin (2006) study and this thesis's data found that dorm and shared room users appreciated secure lockers, some hanging space (for towels or even clothes), shelf space, and individual bed reading lights.

Self catering / kitchens

Self catering, both as a cost savings and as a nutritional option, was considered very important by all those interviewed. Every one of the older travellers used the self catering / kitchen facilities at backpackers *if those were clean*. Several interviewees mentioned they checked the facilities before deciding whether to eat in or not. Only one (on the shortest holiday length of those interviewed) just used the kitchen to prepare breakfast; others typically would prepare most breakfasts and some dinners. One client specifically ruled out B&Bs because of lack of access to the kitchens for all meals and the structured breakfast meal times. The solo travellers particularly valued self-catering, pointing out that dining alone in restaurants is lonely.

The biggest compliments and complaints were generated about kitchens. Cleanliness was a necessity. Older travellers also tend to cook more complicated meals than others, emphasising that "proper" meals and good nutrition were their goals, and that they would never scrimp on food. Backpackers' kitchens ranged widely in style and equipment. The kitchens most appreciated by older backpackers included spices and oil for cooking, sharp knives and good sauté pans (e.g., pans with the Teflon still intact). Recycling bins' presence (or absence) was also commented on by most interviewees.

Everyone agreed that the kitchens get too busy at prime times of morning and evening, but most were willing to work around those rushes. Most older

backpackers tend to rise and use the kitchens before the younger travellers get going in the mornings, typically coming into the kitchen between 6:30 and 8:30 am. Kitchens and dining spaces are communal; two different owners noted that they discourage bookings by large groups (more than four) travelling together because they “tend to take over the spaces and leave everyone else out”.

One accommodation manager mentioned that if she ensures the tea towels are kept plentiful, clean and dry, the kitchen stays cleaner overall.

People live up to your expectations. If you provide a good product, people look after it. I run this as I would want it if I went into a backpackers... (105).

This research supports Cave et al.’s (2007) findings that clean kitchens are ranked only second in importance to older travellers behind clean rooms.

Communal spaces

Different accommodations offer different approaches to creating common spaces. All have indoors and out of doors spaces. One facility has no common indoor space other than a large and friendly kitchen, complete with wood burning stove and enormous kauri slab dining table. “People have to get to know one another here, and they DO” explained that owner (101). Televisions are banned from only one of the facilities; the others relegate them to separate rooms. All have couches and armchairs for reading. One owner says,

From staying in backpackers we knew they’d like the privacy – to come to the common areas to socialise as much as they like, but then go back to their private deck to read or write or hang out (102).

Both solo and paired travellers used and appreciated these friendly layouts, particularly commenting on the presence of outside patios, decks and gardens. Three mentioned specifically that they chose accommodations that offered these additional outside private / public areas.

These are smaller, more homely, a little bit more character, whether it’s the area and the location and the pretty veranda and your nice views... Seems quite small, quite family oriented, quite cosy (Brian).

I remember I was travelling in Wanaka - a lovely backpackers with a million dollar view out over the lake. Probably a better view than those people paying big money in a hotel, and some guy was playing his guitar - all these added bonuses you wouldn't get in a bigger, more sterile environment (Kim).

Preferred spaces for travellers included a small, removed areas for internet, a quiet room for reading, and welcoming, comfortable sofas and chairs that encourage socialising with other guests. As one woman said, "little pockets of space, and outside areas for chats" (Kim).

Only one respondent said she likes occasionally to "blob out in front of the telly" (Helen); everyone else emphatically stated that televisions either should not be present at all or should be in a separate room from social areas to not interfere with conversations. A typical comment was

I don't have a TV at home; I don't want one when I go away. If you want to read a book, fine, or watch television, fine, but you also can chat to people. That doesn't happen in a hotel - if a woman of my age begins chatting with someone in a bar, usually the police are called (laughter). Having a TV in every room is not a good thing (Louise).

In the South Island you see backpackers with TVs in the (sleeping) rooms. I was really surprised. It was a big change from 2000 to 2005, all these private TVs. In North Island that's not usual. I remember especially in Dunedin a very nice backpackers (a former church). We had a TV in our room so of course we were just staying in and watched. But I remember that five years ago [prior], everyone met in the same hall talking and it was more communication. It was one of the main reasons: more communication. If you have a TV you stay in your room, more like a motel. (Heinrich).

Cave et al.'s (2007) study indicates that respondents over 30 also ranked "no noise" and "quiet / study room" attributes higher than did younger respondents. NZTRI's 2007 study indicates that "atmosphere", "location", and "comfortable spaces to socialise" were "very important" or "essential" to 75% of respondents.

Accommodation size

Only one older traveller interviewed had used YHAs in New Zealand, though four subjects had YHA cards bought at a younger age.

YHA facilities in New Zealand are perceived by interviewees using the BBH system as large, impersonal, and without much atmosphere. But YHA was given compliments for being efficient and clean.

The YHAs are fine, totally functional, but just a bit clinical at times. But we've had good experiences with them – they totally deliver what we need (Catherine).

While “sterility in terms of cleanliness is a major attribute, sterility in terms of personality for the accommodation presents feeling of isolation from fellow backpackers” (Obenour et al., 2006, p. 39). Socialising in large facilities is considered more difficult. Ross (Ross, 1997) suggests that older travellers prefer to interact with fewer people than do younger cohorts.

Size appears to be the largest deterrent from hostels of nine people in this research who prefer backpackers.

I do select small backpackers. The clinical feel is yuck. Key points: size, small dorms. I don't normally pay the premium to sleep by myself (Kim).

Obenour et al. (2006) recommend dividing up larger hostel facilities into smaller “programming units” to induce camaraderie and social interaction, something the already-small backpackers’ accommodations seem to have accomplished.

All backpackers’ accommodation owners commented that they would not further expand their facilities (all but one at 30 or less guests). The overriding feeling seemed to be that the personal touch would be lost if the facility were too big. One additional interviewee commented that he had started with a small place and “we used to have parties and dinners and go to the pub with the guests”, but now, with more than 80 rooms, it had become more of a “job” (personal communication with Eric Foley, director, BBH Ltd., October 2007).

Location and safety

Research conducted on preferences in backpackers’ accommodations indicates that location, particularly location near a city centre or near to bus or train depots, is important (NZTRI, 2005; Cave et al., 2007). NZTRI’s 2005 study

indicates that location is ranked as “very important” to 43% of respondents, more important to them than price, cleanliness or security (p. 15). By 2007, location is considered the most important influence (NZTRI, 2007). Cave et al.’s study mentions the importance of a “pick up service” from bus/train stations to the accommodation.

Location did not appear to be a significant factor for these older backpackers, even though five of them were travelling by public transport. The balance had rented or bought a car, so were perhaps more flexible in their location choices. However, nine interviewees specifically mentioned the importance of *not* being in the city or town centre.

Here it's clean and you can feel a little bit at home and it's not so big. I don't want to stay in the middle of Paihia; I really don't want to stay there (Ingrid).

It was in [a neighbourhood of Auckland], which has a reputation for being more bohemian, and not in the city centre, which is probably kind of dead at night. It's nice out here (Edward).

When asked the open ended question, “What’s most important to you in choosing accommodations?”, feeling “safe” was referenced several times in responses from women. They used the language in the sense of wanting a “warm, dry safe bed”, or for the lodging to be “safe and comfortable”, or to have a “safe and dry place to sleep”.

When asked the open question, “Why did you choose New Zealand?”, five women also referred to this country as perceived to be a particularly “safe” place.

I chose New Zealand because it's the other end of the world. I think it's good travelling as a woman by myself, and it's the nature, and it's very easy to meet people (Ingrid).

I knew from 20 years ago that New Zealand was a very easy place to travel, and very secure, so I did very little research before coming (Louise).

We'd like to return here when we're older and other, more adventurous destinations have gotten too difficult. We feel safe and comfortable here (Rita).

Only one man offered a comment about safety in New Zealand.

You can leave money on the table and walk away then come back and know it will be there (Heinrich).

Safety of *location* was not mentioned per se vis à vis accommodations. Unlike the Canadian hostel study (Hecht & Martin, 2006), no interviewees mentioned needing or wanting either front desk staffing 24 hours a day or being concerned about locks on doors, windows, or bathrooms.

Host/ guest interactions

This research suggests that host/guest interactions are to be a key determinant of the overall experience for older travellers. All of the accommodations reviewed had the owners or managers living on-site, which is not necessarily the case in other countries. At each, the actual host was present to check in new guests and answer questions. All had local tour and travel information available; several offered either bikes or kayaks for inexpensive hire. When asked, the hosts were brimming with recommendations about things to see and do in their area. Fourteen of sixteen backpacker interviewees specifically mentioned the hosts and their interactions, and defined their stays largely on their initial reception.

I think it's how you get the first few sentences – the person in the office, when they're friendly, show you the place. Very fast you can figure out if it's clean, and am I welcome... ? (James).

A good stay makes you feel welcome, feel comfortable ... and has information for the next thing you want to do, or suggestions that might interest you. People who have local knowledge, people who are interested in their customers and says, 'Oh, it looks like this person might like to do that'. Somewhere where you don't feel you're actually too much of a guest (Louise).

[If] the owners were there, they'd give you a beer and make you feel at home. The key thing is that it's a lifestyle choice and it impacts the whole atmosphere. They can't do enough for you. You have an interaction with

the other guests but also the owners. It's another depth, another level. They invest more time, especially if they're a little more obscure (Kim).

Hosts agree, though one commented,

I think some people who have backpackers [accommodations] haven't a clue about people, they have no people skills or communication or even the little things that people would like. If people are travelling and are alone perhaps, or they're ill, they just want to feel welcome in the house. Some people are just money driven or they think they can get their own managers in and they don't get good results (105).

The thickness of this data indicates why qualitative responses offer an important dimension otherwise lacking in the literature. Cave et al.'s (2007, p. 232) quantitative study asks two specific questions about the importance to guests of "lots of travel information" and of "availability of booking office for local trips". Overall, the first question is ranked sixth in importance by both the NZ and Scottish respondents; the second question is ranked seventeenth. But that study does not reveal the potential importance of one on one contact and personal recommendations versus the simple availability of posters, brochures, and a phone line to make reservations.

Holiday planning and booking

Commercial information sources

Older backpackers are FITs in their planning and booking patterns. They are far more flexible and independent than many young backpackers who, upon arrival in New Zealand, are encouraged to buy pre-packaged hostels, transport, and activities. Every respondent uses the internet daily for work, email, and news. All had used the internet for at least some of their holiday research or booking; ten of them booked air online, and three went through a travel agent. Of these, one used his corporate agency and the others had different reasons for doing so.

I used a travel agency; I don't know why, because it's so far away? (laughing) It was stupid, really (Ingrid).

I went on the internet, then to a travel agent who specialises in this type of trip and they beat [the price] (James).

Eight booked air travel only; five booked air plus their first one or two nights lodging. Only one couple was booking lodging “a couple weeks in advance” because of high season crowding, but maintained that they did not do so typically (Catherine).

Two women who are career researchers and who thoroughly enjoy the planning stage pre-booked all lodging and rental cars (where applicable), and knew many of their daily activities in advance. But the other backpackers interviewed had done little to no pre-planning except for flights and perhaps the first two nights booking. For four, that was because friends or family were awaiting their arrival. Others though (particularly those with more travel experience) commented that New Zealand is an easy country to travel in, and they just assumed they’d “figure it out” along the way.

What did I prebook? Nothing. Air only. Not even first night. I knew what I like to do, things I hadn't done before, but often if there's just one person, you can squeeze on. I knew that whatever I did I would enjoy. If I couldn't get on one particular [walking] track, there's always something else. Hopefully I'll be back again in a few years (Louise).

Really, deciding what we were going to do was just reading the Lonely Planet once we were here. We knew we flew into Christchurch and out of Auckland and had seven weeks, [and thought], 'now what do we do?' (Rita).

Several commented on the difference between scheduling the time away (and the destination) and actually researching the trip. One German woman had anticipated this trip for more than two years, but had not booked it until three months before when a work contract cancelled (Ingrid). Three other independently employed or retired people also made relatively last minute travel decisions – between three and six weeks prior to departure.

Guide books – “the hall-mark of sedate, middle class tourism” (Cohen, 1973, p. 96) – were used by fifteen participants, particularly the *Lonely Planet* (eleven) and *The Rough Guide* (four); three used both books. The Germans and Dutch used similar books in their native languages. Only the Canadian cyclist did not have a guidebook, “because of the weight” (Ken).

In relation to guide books, it is interesting to note that in the Lonely Planet (Lonely Planet, 2004), the only reference to “backpackers” as a distinct form of accommodation – explaining what it is, and how different backpackers and hostels are set up – is found on page 660. Individual backpackers’ accommodations are categorised as budget lodging, but they are not grouped as networks of accommodation.

The baby boomer tourists (profiled in Table 2) surveyed reflected similar patterns of planning and booking their holidays, though with more dependence on travel agents. Thirty-one (of 54) used the internet, and 17 used travel agents. Ten had used *Lonely Planet* and five, *The Rough Guide*.

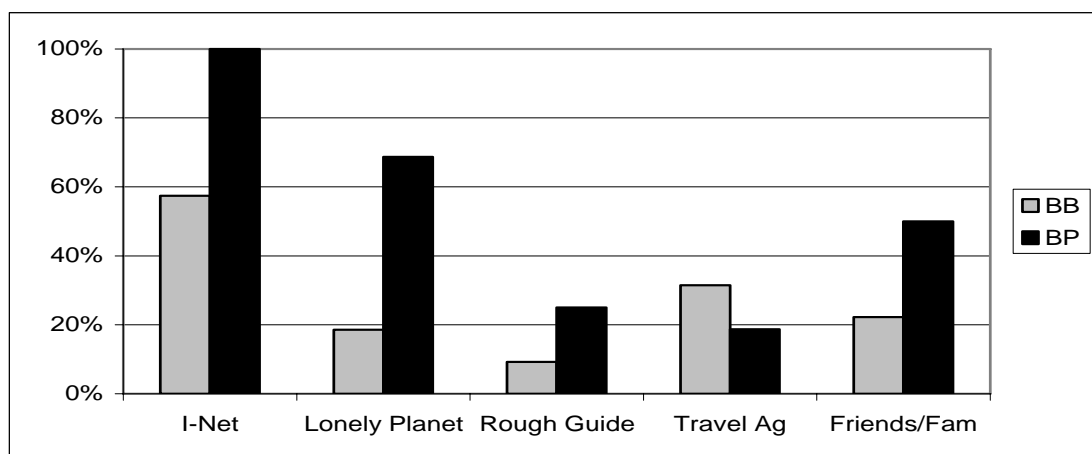


Figure 3: Comparison of older backpackers (BP) and baby boomer tourists (BB): Holiday booking & information sources (BP $n \sim 16$; BB $n \sim 54$)

Hyde and Lawson’s (2003, p. 18) study on independent travellers found that, for their respondents, 80% of vacation elements had not been specifically or generally planned. This thesis suggests that backpackers may indeed be considered a subset of independent travellers, characterised in part by the lack of pre-booking of vacation plans. In addition, this thesis reconfirms Pearce’s (1990) finding that backpackers of all ages are given to more flexible itineraries than average travellers.

One statistic is perhaps particularly important – that 100% of older backpackers and 58% of baby boomer tourists used the internet for their holiday researching or booking (Figure 4). This supports the findings of Niemela-Nyrhinen (2007),

that indicate that, in contrast to stereotypes, baby boomers do not show any technology anxiety. The implications are important to marketers who wish to realise the full economic benefits from maturing consumers.

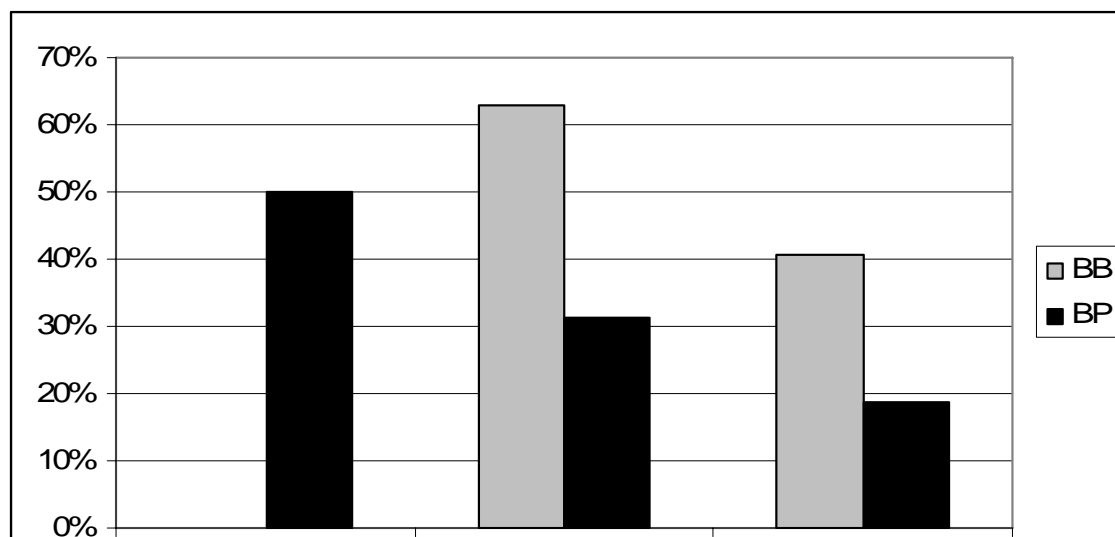


Figure 4: Comparison of older backpackers (BP) and baby boomer tourists (BB): Pre-booked vacation elements (BB $n \sim 54$; BP $n \sim 16$)

Four return backpackers interviewed knew of BBH prior to arrival. One German man pre-ordered the BBH guidebook by mail. Ten travellers found BBH while here, either at I-Sites (three), through conversations with other travellers (two), or by coming upon one unexpectedly (five).

Everyone relied on the BBH ratings system, with ratings generated by other guests.

We start at the top rated one, and if it's booked, we work our way down the list (Wally).

One backpackers' accommodation owner commented that "after [the older travellers] meet all these lovely people, and they start to experiment a bit with lower ratings because they like the socialisation so much" (101).

“Word of mouth”

Recommendations from family or friends have long been recognised as one of the strongest forms of marketing a business can have. This is particularly true for backpackers, for whom one of the main forms of social interaction involves the sharing of travel stories highlighted by both positive and negative experiences (Murphy, 2001; Ross, 1992; Spreitzhofer, 1998).

Each respondent was asked how his or her friends and family would react if told that the respondent was using backpackers/hostels. Their responses again raise the question of how the nomenclature “backpackers” is affecting the accommodations’ marketability to well-off consumers. An identical, emphatic response – “They would think I am crazy” – was given by a German woman and Swedish man. These are the two travellers who earn more than \$100,000 per year. The Swedish professional who booked most of his travel arrangements through his corporate travel agency was particularly sure that his co-workers would not understand his decision to use backpackers’ accommodations.

Other travellers offered more nuanced comments, differentiating between friends with whom they share common interests, and family or workmates who just would not be comfortable with the concept.

People who only ever have been on a package arranged for them – hotel, airfare – find it very difficult to understand. I have a good friend who travels lots, but she wouldn’t consider sharing a room or dorm. Lots of people with no experience of it when they were younger – they think it’s daunting, and very uncomfortable because of the lack of privacy (Louise).

Several pointed out that backpackers and hostels are quite intimidating to those who have not tried them recently in New Zealand. People remember hostels from Europe, or from twenty years ago in this country, or believe one needs to be young, or even to be carrying a backpack. Every American contacted for this research (backpackers and non-backpackers) commented that “backpacking” means something completely different in the US – a multi-day camping trip carrying all one’s gear.

Nonetheless, every older backpacker interviewed would recommend this form of accommodation to people they thought “could handle it”. Most, however, emphasised that they would advise others to stay in small, non-partying backpackers’ accommodations, not the larger youth- and bus-oriented places.

Industry perspectives

Hosts’ objectives and expectations

Of the eight hosts interviewed in this research, four had entered this business as a change of career – two for the presumed lifestyle, one because “I needed a job”, and one because he thought managing backpackers would be easier than managing 220 dairy cows. Four had travelled extensively themselves before opening or buying a backpackers’ accommodation and, in part, chose this business because “When you can’t travel, the world comes to you” (101). All are now full-time operators, though one woman has a different “day” job that also brings in revenue. Seven of the eight, however, use the backpackers’ accommodation as their main income source. All are married and their spouses or grown children are involved with the business daily.

These businesses are characteristic of Singer and Donahu’s (1992) “family-centred businesses” representing distinct ways of life and unique motivations for being in business. Participation by family members is consistent with the organisational structure of self-employed and small employer businesses in which family and minimal non-family labour is used (Shaw & Williams, 2000).

All hosts believe that backpackers’ management is a full-time responsibility. Research observation noted all of these owners interacting frequently with guests, not only at check in, but also during the day and evenings. The main host regularly visited the common rooms and kitchens checking on cleanliness, chatting briefly or answering questions as the moment indicated.

While one owner thinks this business offers an excellent lifestyle – “time with the kids, with your own family, with new people every day” (101) – several

owners are considering leaving the business because of the “24/7” demands on time and energy.

I came here looking at the lifestyle. We don't actually have the time to do it. ... The problem here is that everyone's in the industry, whether they're running a motel or a backpackers or a tour. No one has time for anyone else, if you know what I mean (105b).

We're considering selling. We'd rather be away from here, especially in the summer, so we can do things together (106).

Ateljevic and Doorne (2000) contend that many STEs attract “lifestyle entrepreneurs” who choose to pursue livelihoods that balance the needs of family, income and way of life. Others suggest that “living in the right environment” and “enjoying a good lifestyle” are the dominant motivators for tourism-based family businesses. “Stimulation”, “independence”, and “money” are considerably less important (Getz & Carlsen, 2000). But, as one study notes,

there are hidden dangers in the use of business ventures to realize family and lifestyle goals. The work turns out to be harder and the rewards often less than founders anticipate. Debt is often a problem, and the business tends to overwhelm family life and destroy leisure time (Andersson, Carlsen, & Getz, 2002, p. 102).

Four owners indicated that, as real estate values continue to escalate, the economics of managing a backpackers' accommodation has become more challenging. Those who are using generations-old family homes do well with limited income and slow shoulder seasons. Those who have more recently acquired their properties, or who live in areas of escalating real estate values, question the longer-term viability of their businesses. That said, the financial yield for backpackers' accommodations is actually higher (6.7%) than for hotels (4.0%), motels (5.3%), or camper parks (3.7%) (TRREC, 2007b, p. 8).

Responsiveness to market demands

Facilities and services

As already noted, the literature reflects the presence of increasing numbers of older backpackers. Owners spoken with in this research concur, indicating that

at least 20 to 30% of their guests are over age 40; one owner claims that older guests equal over 40% of his total.

The owners enjoy the older travellers, with every one believing that the inter-generational mix is beneficial to all. One man has built this part of his client base intentionally.

Why? Because we live here. We like to sleep at night. The older group is a lot more easier [sic] to manage (108).

In response to a maturing market, six of eight owners have directly modified or renovated their properties to attract a more sophisticated, more demanding clientele (the remaining two bought into businesses already providing private rooms). Additions of private rooms with ensuites, or conversions of large dorms into either smaller “shares” or private rooms, are most common. All have begun offering internet services as well.

This research appears to confirm findings that small businesses are innovative and able to respond quickly to market demand (Ateljevic & Doorne, 2000; Poon, 1993). In addition, it supports the suggestion that “customer satisfaction was more widely used than profit as an indicator of business success” (TRREC, 2007b, p. 13).

Owners were asked whether the higher value of the New Zealand dollar had any effect on their business. Only one commented that he thought it had.

In the '90s, American and English came in and had money to burn. Skydives and so on - money just flowing out of peoples' pockets. Then the next year the dollar got dearer and people started going to South America or Southeast Asia. New Zealand got the name of being the Switzerland of the South Pacific. Dear, very dear (106).

It should be noted that this interviewee was not the first to use “Switzerland of the South Pacific”; it appears in articles in the *New Zealand Herald* as early as 2001, and specifically in reference to tourism – and backpacking – in 2006 (DaCruz, 2006).

Guests contend that New Zealand needs to meet the new economic realities. One, a German sales representative for a large chemical company who is a frequent visitor to this country, said,

The price [of airfares] to New Zealand has gone up 30-40% in past two years; this will have significant impact on the types of travellers who can afford to get here. It made us think twice about flights even this year. Higher value [private rooms] will be more important as younger travellers cut New Zealand out because of money (Heinrich).

Another woman commented that,

It's important to make sure you keep something for independent travellers of all price brackets. In Europe, 60% of the trips are done by the over 55s. It's the gap year and then all the older people. People raising their families can't afford it. ... Europeans will be coming [to New Zealand] for significant lengths of time, maybe to visit family, but also to go off and do their own thing on their own or with a partner. You've got to make sure that's still viable for them (Louise).

Marketing

The owners interviewed do little marketing for their facilities. Seven of eight mention “word of mouth” as one of the most significant marketing advantages they have. Additional marketing mentions were of the BBH guide, and write-ups in *Lonely Planet* or *The Rough Guide*. Two mentioned having a brochure at the local I-Site (information centre). Only one has a private website for his property. Four said that they had tried “other types” of advertising, but never been sure of the return on investment, so they had discontinued those expenses.

Owners were queried on specifics, for instance, “where do guests come from?”; “how they heard of [your] place?”; “who books ahead?”; “do ensuites fill before dorms?” Most had a general “feel” for guest demographics, but few specifics. Most owners showed themselves to be relatively unsophisticated in their knowledge of business. This corroborates industry-wide findings that operators show that day-to-day operations take precedence over marketing and long-term business strategies for STEs (Page, 1999; Shaw, 2004).

Owners appear to set their accommodations' prices based on their BBH competitors in the area rather than by factoring in actual costs of production, corroborating government findings (TRREC, 2007b). Only one respondent was able to compare his assumptions about the impact of increased rates on guest numbers with actual, historic records. The others did not use strategic pricing histories or decision-making. The report (2007, p. 12) suggests that "firms that did not incorporate their costs into their pricing decision tended to have lower Financial Yield than those that did".

Many have seen the market soften in the past few years, believing that the changes have been brought on in part because of new members in the BBH group, in part because of changes in international airfare and routes – some carriers are now delivering clients directly to the South Island. However, none believe that the exponential growth in facilities will continue, alleging that fewer people can now afford to get into the market because of soaring real estate prices.

Few are concerned about soft shoulder seasons, though six mentioned that those are longer and deeper than ever before. Backpackers' accommodation annual occupancy is 43.7%, and has decreased by 12% between 2003 and 2006. This is due largely to increased supply (35%) over the same period (MOT, 2007a, p. 2).

However, most owners appear relatively unconcerned:

We don't run full all the time. I don't know how you'd do that, really. But we're happy the way it is, gives us a bit of a break (104).

It just ticks over quite nicely (103, 104, 106).

Most, indeed, appear fairly comfortable with this level of business and occupancy, suggesting the validity of Ateljevic and Doorne's (2000) findings that low seasons offer a much-needed respite for family businesses.

6 Conclusion

Research findings

This thesis amplifies existing quantitative research on older backpackers, specifically for those travelling within New Zealand, a well developed backpackers' destination. The findings extend knowledge about the older backpackers' needs, usage and preferences, and the concomitant industry reaction to these travellers. Further, the findings qualitatively probe the less tangible motivations and perceptions of these older travellers. The research also offers preliminary insights into the perspectives of both backpackers and *non*-backpackers within the baby boomer cohort about the word "backpacker" and its related lexicon of terms.

Research questions were formulated through a comprehensive review of literature from three fields of study: academic writings on backpackers, age-related research, and studies of small and medium-sized enterprises. Several subjects within the first two areas of literature overlap including: motivations to travel, types of experiences sought, consumption patterns, and the impact of economics in driving travel choice.

As with most qualitative research, care must be taken in extrapolating general conclusions from small-scale, intimate conversations and observations.

However, the research does suggest areas of similarity and dissimilarity between older backpackers and their younger peers. Demographically, the older backpackers interviewed more closely resemble baby boomers in income and education levels than they do younger travellers. Unsurprisingly, many are more experienced travellers than reflected in Newlands' (2004) study. This is most probably a simple factor of age, though many interviewees had not started travelling internationally until their own children had left home. Nevertheless, 71% had been to New Zealand before. Interestingly, older interviewees stayed in

the country on average almost twice as long as the “average” [therefore, statistically younger] backpacker: 76 versus 30.5 days.

In addition, the research confirms previous studies (Cave et al., 2007; Hecht & Martin, 2004) regarding older travellers’ needs and preferences in backpackers’ accommodation. If travelling with a partner, older travellers want private rooms, whether ensuite or not. Those travelling solo use dorms for affordability or, if money is less of a consideration, prefer private rooms. All dorm-stayers prefer smaller over larger rooms. Older backpackers particularly enjoy using clean, well-equipped kitchens and convivial communal spaces for talking and reading. Television is considered an unwelcome distraction by most. None were overly concerned with personal safety; all were willing to travel to their accommodation – often by foot – away from the city or town centre to escape busier venues.

Additional important differences between older and younger backpackers emerge in this study. Pearce and Lee’s (2005) *Travel Career Pattern* (TCP) suggests that less experienced travellers pursue self development through romance, stimulation, and personal reflections, whereas more experienced travellers are more interested in self development through nature and host-site involvement. Backpacker literature (Binder, 2004; Richards & Wilson, 2004a) supports Pearce’s theory about less experienced travellers, and this thesis’s research suggests support as well for his TCP proposal about more experienced travellers’ interests. The majority of older backpacker interviewees express interest in and commitment to interacting with both their hosts and host communities.

Another divergence between older and younger backpackers revealed by this study is in activities pursued. The older generation, while physically active and even adventurous, are less interested in pursuing the highly commodified (manufactured) risk experiences that New Zealand has become known for. They value this country for its natural environment and seek activities that allow them to interact with nature – hiking, kayaking, sailing, and snorkelling.

Despite the demo- and psychographic differences found between older and younger backpackers, the thesis also offers considerable support for the concept of age neutrality. Within the 20 year age span covered by the interviewees (ages 42 to 63), few discernable differences are discovered about activities undertaken and attitudes expressed. The combined comments from older backpackers, accommodation hosts, and younger guests all suggest that age differences do not negatively affect anyone's experience.

The older travellers fit all of Pearce's (1990) definitions of backpacker:

- They demonstrate a distinct preference for budget accommodations;
- They place an emphasis on social interactions with hosts and fellow travellers;
- They are travelling on independently organised and flexible travel schedules;
- They are travelling for longer rather than very brief holidays;
- They place an emphasis on informal and participatory holiday activities.

Importantly, they confirm Pearce's (1990, p.1) premise that "being a backpacker is an approach to travel and holiday taking rather than a categorisation based on dollars spent or one's age".

How, then, is the backpacking industry responding to this potential market of baby boomer travellers who wish (or need) to travel affordably? Both large hostels and small backpackers' accommodations across New Zealand are adding private rooms, many with an ensuite, to meet the growing demand for these facilities. The backpackers' accommodation owners and other STEs appear to be deftly demonstrating what Storey (1994) identified as a responsiveness to emerging market demands.

Conversely, the findings of this thesis also buttress STE literature that contend that there is limited sophistication and little long term marketing strategising (Page et al., 1999). In particular, it supports both Page et al.'s (1999) and Shaw

and William's (2004) findings that small businesses are risk averse. The data suggest that these owners don't want to risk alienating their traditional core [younger] backpackers' market. There appears to be a hesitancy to target the baby boomer market more aggressively, though it might well result in increased occupancy and revenues. This research suggests that several factors weigh in favour of just such a marketing "re-mix". In particular, as has already been documented in this thesis,

- 51.7% of NZ's visitors are 40 years and older, vs. 22.3% who are 15-29 years old;
- Since 2001, there has been a 49% increase in backpackers' accommodation capacity;
- NZ's tourism industry is facing a potential slowing due to world economic downturns, increasing long haul jet transport costs, and its own strong currency position;
- Backpackers appear to be relatively age-neutral: No evidence was found of significant inter- or multi-generational conflicts when younger and older travellers share facilities at backpackers' accommodations.

Current conditions have created a glut of backpackers' beds. Baby boomer travellers offer a potential to fill many of them. But why, some might ask, would NZ tourism industry leaders promote a less expensive accommodation product to baby boomers instead of encouraging them into the hotels, motels, B&Bs, and campervans they have been using? Financial yield research conducted for the MOT concludes that,

there is no ideal traveller type. Each has merits against a variety of indicators (e.g. residual income, public sector costs, carbon emissions and regional dispersion). This highlights the importance of attracting a mix of travellers to New Zealand to meet its social, cultural, environmental, and economic goals (TRREC, 2007, p. 1).

That conclusion includes backpackers of all ages. Travellers who choose to spend less per day in New Zealand in order to stay longer visit more

destinations throughout the country. Because older backpackers choose to use small, private backpackers' accommodations, as well as to buy meals and activities in more remote areas, they are supporting sustainable, family-operated STEs across the country.

This research has uncovered several areas that are potentially interesting to both academia and industry participants although further research is needed to confirm and expand the initial findings. Quantitative studies would be useful to see if these findings can be generalised to other, older backpackers. Focus groups could explore how shifting the marketing message - including the nomenclature - might be more inclusive of an older audience. Additional research might identify market-based price points for private and ensuite rooms at backpackers' accommodations and how price elasticity varies between older and younger travellers.

Evolving nomenclature

The introduction to this thesis proposes examining, in addition to the underlying research questions, several theoretical topics around the nomenclature of "backpacker". Words pass in and out of vogue. "Tramp" was originally a term of esteem used to denote travelling artisans willing to learn and work in different towns across Great Britain. It was discredited by later users, coming to refer to non-working, impoverished itinerant hobos (Adler, 1985). Cohen originally published the term "drifter" in 1972 to refer respectfully to individuals who chose to travel outside institutionalised tourism and instead live with host communities. But by 1973 Cohen had sub-classified that definition into a continuum of drifting. A few, he indicated, were true *adventurers*, but more typically, they were simply young people alienated from their home societies and too often seeking sanctuary in drugs and the counter culture. As Singh notes, "Cohen named them drifters, but others called them 'junkies'" (Singh, p. 2). Rejecting the word drifter, some academics studying backpackers changed the nomenclature to "wanderer" (Vogt, 1976) or "budget traveller" (Riley, 1988).

Similarly, McCullough (1992, p. 25) theorises that the term “backpackers” [accommodation] evolved to “move away from the stigma of ‘youth hostel’”. Ateljevic and Doorne (2000, p. 131) concur, commenting that “the term ‘backpacker’ came into vogue as a description less derogatory than ‘drifter’ and more succinct than ‘budget traveller’”. But, as asked in the first chapter, what if the backpackers themselves have come to reject that self-definition? Welk (2004) has already determined that more experienced backpackers dismiss the term as limiting.

Has “backpacker” reached its own crisis of definition? The role of nomenclature is “to assign a set of terms or system” (Merriam-Webster, 1927) that enable clearer communication. It offers a frame of reference for understanding, but when that frame overly constricts both industry reaction and academic debate, it may be time to evolve beyond its limitations.

From an industry perspective, the current research raises questions about what damage and negativity the term “backpacker” may be inflicting upon its own industry, and how a lack of lexical (and marketing) sophistication may be perpetuating a narrower audience and lower financial returns than is necessary.

All travellers – both backpackers and non-backpackers – and most owners spoken with in this research agreed that the terms “backpackers” and “hostels” were off-putting to baby boomers. Suggestions were diverse about alternative names – “guest house”, “lodge”, “independent traveller network”, and “budget travel lodgings”. But owners believe that the word would be difficult to change.

You could call it something else, but what? You’d still have to use backpacker, because that’s who you’re trying to attract. What would you change it to? ... It’s been a long time like this, and everyone knows it (105).

While people in the industry may perceive that “everyone knows it”, the research suggests otherwise for the travelling public. The baby boomers surveyed indicate strongly that, while they’d heard the word, it has a negative connotation. Both the older backpackers (and hosts) interviewed admit that the

backpackers' accommodations here in New Zealand are different than anywhere else in the world and, as such, are not well understood in Europe or North America.

One owner, however, for whom older guests already comprise 40% of his total, has a different perspective. He doesn't believe that "backpackers" had a stigma. Or rather, that,

*It has a stigma to that type of older guest who we don't want anyway.
[They'd want] 'my TV, my fridge'. Their expectations might be too high.
So to actively start promoting a different word might not be a good idea.
You'd alienate your core market – [they'd be saying], 'This place is full of
old farts, we're not going to come here' (108).*

For those owners who are comfortable with the status quo, the term backpacker may indeed not be a problem. However, the research suggests that "backpacker" and its related lexicon, indeed, do carry a stigma internationally. If financial resilience is important to the industry as they enter a changing economic climate, it may be time to consider updating the nomenclature to entice a new generation of travellers.

Similarly, the term backpacker has also potentially affected academic perceptions of this market "phenomenon". "Tourism is a fuzzy concept", Cohen first noted in 1974 (Cohen, 2004c, p. 34). This study supports that notion, contending that today's hybrid backpacker fits neither within clear boundaries of travel roles nor of touristic experiences. There is a growing body of evidence that older travellers using backpackers' accommodations fit neither Cohen's *adventurer* (the *sub genus* of his earlier *drifter*), nor his *explorer*, but rather choose to live in moments of each. Likewise, these travellers do not fit comfortably within specific touristic experiences, choosing to change their levels of interaction and connection with local hosts and cultures on an almost daily basis.

It is time, as Uriely (2005, p. 200) notes, to "shift from homogenizing portrayals of the tourist as a general type to pluralizing depictions that capture the multiplicity of the experience". The hybrid consumers interviewed for this thesis

buy what suits them, at this moment, for this journey. Inexpensive lodging and four star resorts, DOC tramping huts and all inclusive sailing packages figure in to their itineraries. They're not willing to be "pigeon-holed" by age or nomenclature, rejecting both the notion that older people should travel in a certain style as well as rejecting that they themselves are backpackers.

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Appendix A: Backpackers' participant information

Project Title: Backpackers: The Next Generation

Invitation: As a mature, independent, budget traveller in New Zealand, your travel choices are extremely important to the hospitality industry of this country. You are invited to participate in an interview about your travel habits and preferences in lodging accommodations.

What is the purpose of this research? To research, through interviews with budget travellers of at least 40 years of age who may or may not currently stay in backpacker/hostel accommodations, what their perceptions are of backpacking, hostels, the services offered, and the information networks used to research and book travel.

This research is being conducted as part of a Masters of Philosophy at AUT University. Results will be used in journal and conference publications.

How are people chosen to be asked to be part of this research? Older (40 years+), independent travellers in NZ – both foreign and domestic – will be queried about their accommodation preferences and habits. Participation is completely voluntary. By completing the interview or focus group you are consenting to participate in this research.

What happens in this research? We will ask for 60 minutes of your time to participate in a one on one qualitative interview or 90 minute focus group which will be audiotaped and transcribed. If you do not wish to be taped, that's fine; the interviewer will transcribe notes by hand. Indicative research questions have been formalized, but we encourage your additional thoughts and comments as well. You can review the information that you have given if you would like to do so. The researcher can arrange a time that suits you during which you can listen to the recorded tape or read the researcher's notes. You will not need to complete any other activities for this research.

What are the discomforts and risks? Questions/participation should not cause any discomfort. However, if you would prefer not to answer a certain question, you may say so and the researcher will ask a different question instead

How will these discomforts and risks be alleviated? All questions are optional, and you may choose not to answer any questions as you wish. If you change your mind about participating in this study, you can ask the researcher at any time PRIOR TO February 15, 2008, to not use your information. Please refer to your personal code number, Number ___, to be removed from this study.

What are the benefits? This research will result in a better understanding of the needs and interests of age 40+ independent travellers in NZ, which in turn will hopefully benefit the backpacker and accommodations industries and, in turn, expand accommodations options for mature, budget conscious travellers.

How will my privacy be protected? All answers are confidential and your answers can in no way be linked to your personal or business details. Your responses will be analyzed by the code number assigned above.

What are the costs of participating in this research? There is no cost to you, apart from your time.

What opportunity do I have to consider this invitation? The interviewer will give you her contact details and schedule and it will be left to you to decide whether you'd like to participate.

How do I agree to participate in this research? To participate in this research, notify the researcher of your willingness to proceed, read and sign the attached consent form to indicate that you understand and agree to the provisions of this project, and schedule time for an interview with the researcher.

Will I receive feedback on the results of this research? The results of this research will be available on www.tri.org.nz in mid 2008. Results may also be presented in your local media.

What do I do if I have concerns about this research? Any concerns regarding the nature of this project should be notified in the first instance to the Project Supervisor, Dr. Hamish Bremner, hamish.bremner@aut.ac.nz, or 09 921-9999 ext 5898.

Concerns regarding the conduct of the research should be notified to the Executive Secretary, AUTEK, Madeline Banda, madeline.banda@aut.ac.nz, 921 9999 ext 8044.

Researcher Contact Details: Anne Markward: email: amarkwar@aut.ac.nz, phone 09 921 9999 ext 8890

Project Supervisor Contact Details: Hamish Bremner: email Hamish.Bremner@aut.ac.nz, phone 09 921 999, ext 5898

Approved by the Auckland University of Technology Ethics Committee on 4 Oct 2007

AUTEK Reference number 07/144.

Appendix B:

Accommodations' owners participant information

Project Title: **Backpackers: The Next Generation**

Invitation: You are invited to participate in an interview about “older” backpackers – travellers who are over 45 years of age. The interview will explore how you, as a backpackers/hostel owner or manager, are presently addressing these travellers’ needs and expectations, and whether you would be willing to alter your practices to attract more clients of this generation.

What is the purpose of this research? To research, through interviews with budget travellers of at least 45 years of age who may or may not currently stay in backpacker/hostel accommodations, what their perceptions are of backpacking, hostels, the services offered, and the information networks used to research and book travel.

To research further current business owners’ opinions of this market segment, and their interest in and ability to attract additional older travellers.

This research is being conducted as part of a Masters of Philosophy at AUT University. Results will be used in journal and conference publications.

How are people chosen to be asked to be part of this research? Older (45 years+), independent travellers in NZ and backpackers/hostel owners will be interviewed. Participation is completely voluntary. By completing the interview you are consenting to participate in this research.

What happens in this research? We will ask for 60 minutes of your time to participate in a one on one qualitative interview which will be audiotaped and transcribed. If you do not wish to be taped, that’s fine; the interviewer will transcribe notes by hand. Indicative research questions have been formalized, but we encourage your additional thoughts and comments as well. You can review the information that you have given if you would like to do so. The researcher can arrange a time that suits you during which you can listen to the recorded tape or read the researcher’s notes. You will not need to complete any other activities for this research.

What are the discomforts and risks? Questions/participation should not cause any discomfort. However, if you would prefer not to answer a certain question, you may say so and the researcher will ask a different question instead

How will these discomforts and risks be alleviated? All questions are optional, and you may choose not to answer any questions as you wish. If you change your mind about participating in this study, you can ask the researcher at any time PRIOR TO February 15, 2008, to not use your information. Please refer to your personal code number, Number ____, to be removed from this study.

What are the benefits? This research will result in a better understanding of the needs and interests of age 45+ independent travellers in NZ, which in turn will hopefully benefit the backpacker and accommodations industries and, in turn, expand accommodations options for mature, budget concious travellers.

How will my privacy be protected? All answers are confidential and your answers can in no way be linked to your personal or business details. Your responses will be analyzed by the code number assigned above.

What are the costs of participating in this research? There is no cost to you

What opportunity do I have to consider this invitation? The interviewer will give you her contact details and schedule and will be left to you to decide whether you'd like to participate.

How do I agree to participate in this research? To participate in this research, simply participate in the interview or focus group.

Will I receive feedback on the results of this research? The results of this research will be available on www.tri.org.nz in mid 2008. Results may also be presented in your local media.

What do I do if I have concerns about this research? Any concerns regarding the nature of this project should be notified in the first instance to the Project Supervisor, Dr. Hamish Bremner, hamish.bremner@aut.ac.nz, or 09 921-9999 ext 5898.

Concerns regarding the conduct of the research should be notified to the Executive Secretary, AUTEK, Madeline Banda, madeline.banda@aut.ac.nz, 921 9999 ext 8044.

Whom do I contact for further information about this research?

Researcher Contact Details: Anne Markward: email: amarkwar@aut.ac.nz, phone 09 921 9999 ext 8890

Project Supervisor Contact Details: Hamish Bremner: email Hamish.Bremner@aut.ac.nz, phone 09 921 999, ext 5898

Approved by the Auckland University of Technology Ethics Committee on 4 October 2007

AUTEK Reference number 07/144.

Appendix C: Indicative questions for older backpackers

INTERVIEW OUTLINE For Backpacker/Hostel Guests

Personal Travel Info

From?
Age?
Employment?
Traveling with?
How?
Where?
How long will you be in NZ?
Other countries?
Have you been to NZ before?
Priorities?
Activities?
WHY do you travel?
WHY NZ?
Expectations of NZ?
Perceptions?
Particular likes/dislikes?

General Philosophy:

What kind of travel do you do?
What's the difference between a traveller and a tourist?
What image does the word "backpacker" conjure up for you?
When/where did you first start hearing/using it?
How old do you FEEL??

Travel/ Trip Preferences:

Other accommodations?
Define a "good stay"
Higher end accommodations?
What facilities do you most use at backpackers?

Positives/Negatives?

Improvements?

Interactions?

How far ahead do you book?

NZ backpackers/backpacking? [Unique?]

Reactions of others?

Continue to use?

Promotion ideas?

Trip Planning:

How did you plan this trip?

What, when, where?

Which information resources did you use?

Change from 10 years ago?

When you were first planning this trip from your home country, did you plan on using backpackers/ hostels?

Info found...?

Info...good? Useful?

Which site(s) or books or ___ did you use?

How could the information available have been improved?

Appendix D:

Indicative questions for accommodations' hosts

INTERVIEW OUTLINE

For Backpackers/Hostel Owners

General Business Info

How long have you been in business as a backpackers/hostel owner?

Why did you choose to enter this particular market/business?

Did you travel before opening this business? Where? When? How?

How have you seen it change since

- The early 90s
- The mid 90s
- 2000-2002?

Who do you consider your greatest competitors?

Which of the backpackers/hostel associations do you belong to?

How is business going? How was the 06/07 summer season?

What is your best hypothesis about how your business will do next summer?

In the next few years?

What will be the major changes in this particular industry?

What, if any, impact has the strong Kiwi had on your business?

Your Clients

Who is your "typical" client?

How many non traditional – eg, older – backpackers do you host?

When did you decide to build/create additional facilities, like private rooms and ensuite rooms?

Has that investment been worthwhile for you?

Who typically buys this product?

Are these rooms reserved further in advance than dorm accommodations?

How many days/weeks before arrival?

Do older guests have the same booking patterns as others?

What kind of occupancy do you have in the private/ensuite rooms vs. dorm rooms?

What percentage of your revenues come from private/ensuite rooms vs. dorms?

Do your older guests interact with the other travellers?

What are the positives of having older guests at this backpackers/hostel?

The drawbacks?

From conversations with your older guests,

Why do they choose to backpack?

What are the benefits to them that they speak of?

What are the difficulties (if any)?

What changes do they mention they would like to see in the backpacking network?

Do your older guests stay in multiple backpackers/hostels?

Do you ever ask them, "how did you hear about backpacking?"

How do they react to the word "backpacker" or "hostel"?

Is this a market segment you would like to pursue? (Do older guests "work" for you?)

How do you see doing that?

Advertising/Marketing

Where do you advertise?

How much do you spend yearly on advertising?

How do you think your industry/ association/ NZ Tourism is doing with their marketing efforts?

Do their efforts address the needs/interests of this older traveller?

How could they better target this market?

What needs to happen from a marketing perspective to strengthen NZ as a destination for older travellers?

What do you need to do to re-focus your own advertising?

What do you need to do to re-focus your own hospitality offerings?

What other comments do you have?

Appendix E: Exploratory survey questions

Accommodation Preferences

of International Visitors

Nationality:

Age:

Travelling with: ___partner ___friend ___family ___alone

Accommodation Type: H / Motel B&B Backpackers F&F

or campground: RV Cabin Tent

How long are you in NZ? _____ days _____ weeks _____ months

Other?

How did you research your trip to NZ?

___ internet ___ LP ___ RG ___ travel agent ___ F&F ___ other:

Have you heard of "backpacker" accommodations? Yes No

What does "Backpacker" mean to you? What is a "backpackers"?

Notes:
