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**BACKPACK TRAVELLERS USING
COMMERCIAL BACKPACKER ACCOMMODATION
IN QUEENSLAND.**



by

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ABSTRACT

This minor research thesis is partial fulfilment for the post-graduate degree of Master of Business (Tourism Development).

The Backpacker market in Queensland has emerged as an important segment of the tourism system in Australia. The Backpack traveller is predominantly from overseas and is seeking a particular type of travel experience. In order to maintain this style of travel, Backpack travellers are away from home for long periods of time, make use of less expensive accommodation, use low cost transport and engage in tours and activities that will meet the travel experience they are seeking.

The aim of this minor research thesis is to investigate the size of the Backpacker market in Queensland and to identify the transport and expenditure patterns and selected socio-demographic characteristics of Backpack travellers using commercial Backpacker accommodation in Queensland.

By comparing the Backpacker market with the total "holiday" market in Queensland it was found that the Backpacker market in Queensland represented 5.5 percent of all nights spent by visitors on holiday in Queensland who used commercial accommodation. Because of the high proportion of Backpack travellers from overseas, this impact becomes even more significant when compared with the total international "holiday" market in Queensland.

Expenditure by Backpack travellers in Queensland was estimated at \$104.8 million during the 1989/90 financial year. The average daily expenditure by Backpack travellers is not considerably less than for the total "holiday" market in Queensland, however the distribution pattern of their expenditure is somewhat different. The expenditure by international Backpack travellers is positively contributing to Australia's balance of payments. Due to the high proportion of the Backpackers' expenditure which is spent on local transport (including tours), food and beverages, much of the revenue generated by Backpack travellers in Queensland remains within the local economies of the State.

Backpack travellers tend to stay longer in Queensland than most "holiday" visitors and Backpack travellers also visit more regions of Queensland as part of the one trip, therefore distributing their wealth more widely throughout the Queensland economy.

The research findings from this minor thesis suggest a number of implications for tourism planners, developers, local governments and tourism operators investigating the Backpacker market in Queensland.

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CHAPTER 1.0 BACKPACK TRAVELLERS USING COMMERCIAL BACKPACKER ACCOMMODATION IN QUEENSLAND.

While much of the focus for tourism development in Australia has been directed at the capital intensive "upper" end of the market, with the intention being to lure the "Big Spenders" to our shores, there has emerged a market at the "lower" end of the scale that requires relatively less capital expenditure, and may as some recent reports suggest, make a significant economic contribution to tourism in Australia (Hawley 1989; Pearce 1990). The Backpacker market has emerged as an important segment of the tourism system in Australia.

There is relatively detailed information about other tourist markets in Australia, such as international and domestic travellers. The international market has been segmented by the traveller's country of origin by the Bureau of Tourism Research and analysed through the International Visitors Survey. The characteristics of the domestic visitor have been analysed through the Domestic Tourism Monitor - however few studies have been targeted specifically at the Backpack traveller.

The terms "Backpack traveller" and "Backpackers" have become generic terms used to describe people who are seeking particular types of travel experiences. This may mean Backpack travellers seek to observe and experience other cultures, seek different social and natural environments, participate in activities that are new and different, or travel as a form of escape or transition from their own lifestyle at home or

simply travel for the sake of "seeing the world". In order to maintain this style of travel, Backpack travellers tend to be away from home for long periods of time, make use of "low cost" accommodation and transport facilities and engage in tours and activities that meet the travel experiences they are seeking (Cohen 1972; Graburn 1983; Riley 1988; Pearce 1990 and the Northern Territory Tourist Commission, 1990).

Recent studies have revealed problems with defining exactly who and what constitutes a Backpack traveller, therefore this study uses an operational definition of Backpack travellers as;

domestic or international visitors using commercial Backpacker accommodation in Queensland, who are more than forty kilometres away from their usual place of residence and staying in a survey region of Queensland for at least one night but no more than ninety consecutive nights within the same region. In addition, this definition further identifies a Backpack traveller by the main purpose for their trip, thereby excluding work related and formal educational reasons for travel.

The need for specific research on the Backpacker market has been identified by industry bodies such as the Queensland Tourist and Travel Corporation (QTTC) and the Australian Tourism Industry Association (ATIA). The Executive Director of ATIA O'Clery (1989, p.38), observed that;

"... the Backpackers long and short-term contribution was often overlooked and under-estimated. Their priorities were different from those of other visitors. Many preferred not to pre-book accommodation or transport, and they did not show up in many "tourism" statistics. The tourism industry must glean the information on the numbers, needs and aspirations of all youthful travel whether on working holidays or otherwise.... Backpackers return and they fit the tourist mould second time around".

As O'Clery suggests, the contribution that the Backpack traveller makes to tourism in Australia has been absorbed in the broad category of "tourist" and therefore cannot be differentiated from most of the tourism statistics currently used in Australia today.

With the emergence of this market and the associated increase of operators catering specifically for the Backpack traveller within the tourism system of Queensland, there is a vital need for objective research that can be used by planners, investors, developers and operators.

Another related problem is that newspaper reports on Backpacker accommodation, have highlighted problems experienced by operators, such as overcrowding, fire, health infringements, noise and rubbish pollution, which need to be monitored. Due to the lack of information on Backpack travellers in Queensland it has been difficult for governments to plan and legislate for this type of market.

1.1 Purpose of the Study

The purpose of this study was to investigate the phenomena of Backpack travel within the Queensland tourism industry through the analysis of selected characteristics of the Backpack traveller in Queensland. In order to better understand the travel habits of this tourism segment, these characteristics were analysed to establish the size and composition of this market in Queensland.

Specifically, this study was designed to identify selected socio-demographic, expenditure and other travel characteristics of Backpack travellers who use commercial Backpacker accommodation in Queensland.

A related aim of this study was to provide data that can be used to compare the Backpacker market with the "holiday" segment of the tourism market in Queensland so that this information can be used for the future planning of this market segment.

1.2 Research Objectives

To understand more about the Backpacker market in Queensland several research questions were posed which help establish the objectives for this study.

The research questions relevant to this study include the following:

- a. How large is the Backpacker market in Queensland?
- b. How long do Backpack travellers stay in Queensland?
- c. Where do Backpack travellers to Queensland come from?
- d. What is the age, sex and occupational status of Backpack travellers?
- e. What type of expenditure patterns do Backpack travellers have?
- f. What modes of transport do Backpack travellers use?
- g. What type of activities do Backpack travellers pursue?
- h. How does the Backpacker market compare with the "holiday" market in Queensland?

These research questions have been analysed further through primary research with the following aims:

1. To determine the size of the Backpacker market compared with the "holiday" market in Queensland.
2. To determine the impact of expenditure by Backpack travellers compared with the "holiday" market in Queensland.
3. To determine if the socio-demographic characteristics of Backpack travellers differ from the "holiday" market in Queensland.
4. To determine if the travel characteristics of Backpack travellers differ from the travel characteristics of the "holiday" market in Queensland.

1.3 Delimitations of the Study

This study was delimited to the following factors:

1. The research data produced for this study was designed to meet the needs of the Queensland Tourist and Travel Corporation (QTTC) as part of their Major Survey Research Programme (MSRP). This data therefore allowed for the

direct comparison of Backpack travellers with the visitation, expenditure and travel characteristics of all "holiday" travellers in Queensland.

2. The data obtained for this study was obtained from a sample of Backpack travellers and "holiday" travellers using commercial accommodation in Queensland.
3. The state of Queensland was used as the geographical boundary for this study. Within Queensland there are major tourism survey regions that have been identified by the QTTC for analysis as part of their Major Survey Research Programme. The survey regions found to be most dependant on Backpack travellers include; the Brisbane region, Mackay/Proserpine region, Townsville/Bowen region and the Cairns/Tablelands region. Refer to Appendix 2 for a detailed outline of the Backpacker regions used in this study.
4. The collection of Backpacker data for this study was conducted during the 1989/90 financial year, with supplementary data collected during the June quarter of 1990.
5. Commercial accommodation operators catering primarily for Backpack travellers were used to identify Backpack travellers who stated their main reason for their trip as being for the purpose of "Working holiday", "Pleasure holiday", "Sport and recreation" or "Visiting friends and/or relatives".

6. The characteristics identified in this study were delimited to selected socio-demographic, expenditure and visitation patterns in Queensland in order to compare the Backpacker market with the "holiday" market in Queensland.

1.4 Limitations of the Study

This study was limited by the following factors:

1. Methodological issues relating to the Major Survey Research Programme as used by the QTTC. These issues are discussed in more detail in Chapter 3.0, but include limitations of "enroute" surveys, the use of sampling techniques, the estimation process and questionnaire design.
2. Definitional issues surrounding the term Backpack traveller. For example, sociological interpretations of what constitutes a Backpack traveller as defined by other studies (see Riley 1988 and Pearce 1990), are different to the operational definition used for this study. The definition of a Backpack traveller used for this study can be objectively identified and measured by the Backpack travellers' type of accommodation used, the length of stay and the purpose of their trip.
3. Backpack travellers exclusively using forms of accommodation other than Backpacker accommodation was not included. For example, Backpack

travellers exclusively staying with friends and relatives or using caravan parks and camping grounds and not using Backpacker accommodation at all while in Queensland were not considered for this study. However, it is likely that Backpack travellers would have used Backpacker accommodation at some stage of their travels in Queensland and would therefore be included within the scope of this study.

4. Although qualitative research suggests Backpack travellers remained in Australia for periods of up to one year or more, this study limited the number of nights spent in any particular region of Queensland to no more than ninety consecutive nights. This limitation on the length of stay for Backpack travellers allowed for the direct comparison with other travel data produced by the QTTC as part of their Major Survey Research Programme.
5. Due to practicality, time efficiency and cost constraints, the data collected in this study was from an "enroute" sample of Backpack travellers in Queensland during 1989/90 and is therefore subject to normal sampling and non-sampling error.
6. The data for this study was collected during the 1989/90 financial year which was disrupted by a number of extraneous factors such as the domestic pilots dispute and two fatal bus accidents in New South Wales. These extraneous factors and events may have influenced the travel pattern of Backpack travellers in Queensland during this period.

1.5 Definition of Terms

Backpack traveller:

Visitors who use commercial Backpacker accommodation in Queensland, who are more than forty kilometres away from their usual place of residence and stay in a survey region of Queensland for at least one night but no more than ninety consecutive nights within the same region. In addition, the main purpose for their trip was either a "Working holiday", "Pleasure holiday", "Sport and recreation" or for "Visiting friends and/or relatives".

Backpacker accommodation:

Commercial accommodation operators who primarily cater for Backpack travellers in Queensland. This definition includes guest houses, hostels and Backpacker establishments which predominantly provide "shared" facilities, but excludes caravan parks and camping grounds.

Expenditure:

Expenditure includes cash outlays for accommodation, local transport, food and beverage, pleasure shopping, tours and other out of pocket expenses. This applies only to direct expenditure during the previous 24 hours, whilst staying within a particular tourism region of Queensland.

Major Survey Research Programme (MSRP):

The MSRP is an ongoing survey designed to monitor trends and characteristics of travel based in commercial tourist accommodation establishments. The survey is contracted with the National Centre for Studies in Travel and Tourism (NCSTT) and has been commissioned by the Queensland Tourist and Travel Corporation.

Purpose of Trip:

The main reason stated for the Backpack travellers current trip. Categories include "Pleasure holiday", "Working holiday", "Sport and recreation" and "Visiting friends and/or relatives".

Queensland Tourist and Travel Corporation (QTTC):

The QTTC is a state government statutory authority responsible for the growth of tourism in Queensland.

Tourism regions:

The tourism regions used by this survey are consistent with the geographical areas identified by the QTTC and are detailed in Appendix "2".

Usual Place of Residence:

Includes the state or country of permanent residence, which helps disaggregate domestic and international Backpack travellers.

The above definitions have been used in order to maintain consistency with the definition of terms used by the Queensland Tourist and Travel Corporation and allows the data in this study to be compared with other travel data produced as part of the Major Survey Research Programme. Additional definitions that are part of the MSRP Methodology are explained in Appendix 1.

1.6 Significance of the Study

Through an analysis of the users of Backpacker accommodation, it is possible to provide the tourism industry in Queensland with substantial information on the characteristics of the Backpack traveller in Queensland.

The information provided by this study will enable the tourism industry in Queensland to better understand a market that has been identified by various tourism bodies, such as the Australian Tourist Commission, the Australian Tourism Industry Association and the QTTC, as worthy of further investigation.

The significance of this study to the tourism industry will help with the development of policy and planning guidelines for the Backpacker market in Queensland.

This study will help the user understand more about the different travel habits and characteristics of Backpack travellers compared with other travel segments and will help identify and further define the needs of Backpack travellers in Queensland.

This study will help with the development of new tourism products and services and the refinement of existing services to meet the Backpack travellers' needs as well as helping to develop more effective marketing strategies aimed specifically at Backpack travellers.

The characteristics identified by this study will be beneficial to State and regional planners and governments, as well as accommodation, tour and transport operators who target or intend to target the Backpack traveller in Queensland.

Finally, the characteristics of the Backpack traveller identified in this study will act as the catalyst for further monitoring of this market segment in Queensland.

CHAPTER 2.0 REVIEW OF LITERATURE

In order to provide quantitative data on Backpack travellers using commercial accommodation in Queensland, this chapter reviews other studies and theories concerned with the Backpack style of travelling. This background information provides a rationale that helps identify and describe the characteristics that need to be considered in order to establish the size and nature of the Backpacker market in Queensland.

Much of the literature available on Backpack travel is exploratory in design and primarily clarifies the concepts associated with Backpack travel. This type of qualitative information helps identify and describe how Backpack travel has developed over the years and what motivating and experiential factors are associated with Backpack travel. This information therefore helps form the basis for this market analysis on the Backpacker market in Queensland.

2.1 The Development of the Backpack Traveller

The origin of what is now termed "Backpack travel" has been traced through history to the sojourns of "tramping" and "long-term" budget travel by sociologists such as Riley (1988) and Adler (1985). These authors have outlined the motives and experiences of early travellers and suggest they have developed into the "long-term" budget or Backpack travellers of today.

Adler (1985, p.338) outlines the development of the travel traditions of the poor in England, France and Germany and labels the "English tramping system" of the late eighteenth century, as a fore-runner to the long-term budget traveller of today, "in short, almost every trade developed a tradition of sending its members, particularly the young and unmarried, on "tramp" from town to town".

The English tramping system reached its peak in the early nineteenth century and was regarded as a "tour" in search of work whereby workers stayed at various "craft society inns". The French "Tour de France" and the German "Wanderpflicht" (travel duty) were the European equivalents to the English tramping system and used a state-based hostel system for accommodation and as a work base (Adler 1985, pp.338-339). This accommodation network formed the impetus for the development of the "hostel" system, leading toward the modern Backpacker accommodation establishments of today.

Adler (1985, p.335) suggests that during the course of the nineteenth century, tramping declined as a labour related institution and was adopted by middle class youth exclusively for tourist purposes. Adler outlines many of the early writings on tramping, and suggests that the major historical change was the transformation of a labour related youth practice to that of a leisure pursuit.

"The road culture of contemporary youth provides an example of an upwardly rather than downwardly mobile cultural transition, with middle class youth increasingly adopting a mock version of an earlier working class travel pattern" (Adler 1985, p.337).

Riley (1988, p.314) expands on the work of Adler and supports Cohen and Graburn by suggesting that "tramping" was a form of tourism that provided opportunities for

sightseeing, adventure and education through "first-hand" experience. However, as "tramping" became institutionalised and a respected travel pattern for young men of the working class, it also began to lose its positive image. By the end of World War I, "tramping" by the middle class and skilled workers was being replaced by unskilled migrants and vagabonds as a form of cheap travel and free accommodation, relying on charitable organisations.

According to Riley (1988, p.314), society viewed this style of travel as deviant, or at least marginal behaviour, and Western countries during the twentieth century largely viewed "life on the road" as suspicious and lacking legitimacy. Nevertheless, the long-term international traveller is often regarded with a mixture of admiration and scepticism.

Adler and Riley both agree that tramping declined as a labour related institution, and suggests that during the 1950's and 1960's contemporary long-term travel became recognised as a useful adjunct to a liberal education. This type of travel became more institutionalised through the hostel movement and the budget travel guides that emerged. Riley (1988, p.315), acknowledges that

"the contemporary long-term youthful traveller is more focused on leisure than on work. Although, as a means to the end of extending one's leisure, it is not uncommon for today's traveller to seek out temporary work opportunities to augment savings".

Pearce (1990, p.4-11) in his study on the Backpacker phenomenon, briefly identifies four independent themes contributing to the emergence of the contemporary Backpack traveller in Australia. In outlining each theme, Pearce (1990, p.4) postulates that, "social movements and traditions which were only partly or differently

manifested in Australia at the time may be behind a phenomenon which is now largely concentrated on Australia and the Asia-Pacific region".

The first theme identified is based on "education" and was manifested in the "Grand Tours" of Europe and undertaken by well-bred young Englishmen in the seventeenth and eighteenth centuries. The 1950's saw the emergence of International Student Exchange programmes and the "cultural cringe" of Australians travelling overseas during the 1950's and 1960's to educate oneself and broaden one's worldly experiences. This "educational" theme supports Graburn's notion of "cultural self-confidence" and Riley's suggestion of travel focussed primarily on leisure and education through "first hand" experience.

The "escape" theme that Pearce (1990, p.6) develops elaborates on the qualitative research conducted by Riley and the "rites of passage" ideal developed by Graburn, whereby travel is viewed as a socially acceptable means of escape and is a justified form of activity while "life-path" decisions are being made or avoided. This "escape" theme was evidenced by the "marginal" behaviour of the "hippie/drifter" type of traveller during the 1960's and 1970's.

A third theme that Pearce (1990, p.9) develops relates to "health and activities". From the European Spa and Health resorts of the nineteenth century to the development of budget hostels and youth organisations in the 1920's and beyond, travellers could pursue recreational and health activities as they ventured from place to place. According to Pearce (1990, p.43), this perspective with its emphasis on health related

activities and pursuits can be extended to include the concept of "green" tourism and the environment-related activities pursued by the Backpack traveller such as bushwalking and diving. These environmental based activities have been the catalyst for the formation of special interest clubs and organisations such as the Youth Hostel movement whereby the emphasis of travel is centred on the environment and not necessarily the accommodation.

The fourth theme that Pearce (1990, p.10) advocates is that of "occasional work". Associated with the "tramping" travel patterns outlined by Riley and Adler before World War II, there was some movement amongst working and middle class Australian youth to travel abroad to seek casual jobs. By the 1980's there was an established market for casual employment in most host countries, which provides an important impetus for long-term travel or travel to "long-haul" countries.

"The opportunity to support a holiday by taking casual work lengthened the holiday for some, and for others represented the vital difference between travelling abroad and staying at home" (Pearce 1990, p.10).

The perspective developed by Adler, Riley and Pearce help to explain the development of today's Backpack traveller and outline the motivations, attitudes and styles attributable to the Backpack traveller of today.

2.2 The Development of Backpacker Accommodation in Australia

The development of an accommodation system to facilitate the Backpack traveller in Australia is part of the necessary infrastructure for identifying this type of traveller. The

accommodation establishments catering for Backpack travellers provide an important base whereby travellers can pursue their goals and where they can meet other travellers seeking the same ideals.

Not all Backpack travellers exclusively use Backpacker accommodation. Camping, resorts, staying with friends and relatives and renting houses all constitute the type of accommodation used by Backpack travellers. However, it is the Backpacker establishments that primarily target this market, and through the identification of these establishments information on Backpack travellers can be obtained.

Swain (1989 p.14), a freelance travel writer, claims that international Backpack travellers have been "enjoying our beautiful country for decades and staying in hostels". Swain reports that it has only been since investors began pouring millions of dollars into "five-star" international resorts, that the older resorts and motels have reassessed their situation and discovered the budget international traveller.

The youth hostel movement in Australia has long been considered as the domain of the Backpack traveller. The concept of the Youth Hostel Association evolved from

"a social organisation providing simple country hostels mainly for local members on week-end and holiday trips, but now earns most of its income from young overseas travellers seeking value for money accommodation in their travels" (YHA 1989).

With restrictive rules and regulations, the Youth Hostel network did not appeal to all types of long-term budget travellers and a new market was developed by commercially oriented Backpacker accommodation operators.

The youth hostel movement endured the development of commercially operated Backpacker establishments in Australia which incorporated new features and amenities and developed a social, "multi-cultural" atmosphere. According to Higginson (in Hawley 1989, p.13),

"the rise of Backpacker accommodation (during the 1980's) can be seen as an updated version of youth hostels and the Australian origin of Backpacker accommodation was based on olden times, when you travelled all day by horse drawn coach and at night stopped at an "inn", which provided a warm bed, food, drink and good company".

The Youth Hostel Association in Australia responded to the improved amenities and services offered by Backpacker operators by amending their regulations and controls and developing,

"new look hostels that provide courtesy pick-ups, swimming pools, bedrooms for couples, tour booking agencies, cafeterias and top locations with panoramic views. (The Travel Reporter 1989, p.11).

According to a report by the Cairns Backpackers Accommodation Association (1988), the term "Backpackers" was created to remove the stigma associated with the word "hostel". Hostels to most people mean a place of low standard accommodation and is often viewed as some type of refuge for society "misfits".

Cairns and Sydney are widely recognised as the "pioneers" of Backpacker establishments in Australia. The Cairns Backpackers Accommodation Association (1988), identifies four stages of growth for the development of Backpacker accommodation within the Cairns region.

1. Prior to 1977 there were Youth Hostel Association establishments in the region.

2. Between 1977 and 1983, "Aussie" style guest houses and holiday flats were viewed as the forerunners of the Backpacker establishments of today.
3. In 1983, the first "Backpackers Inn" was opened aimed at catering to the international budget traveller.
4. Since 1985 many motels and guest houses have been converted to cater for Backpack travellers and incorporate high profile marketing strategies.

Since the late 1980's and into the 1990's there has been a period of increased competition between Backpacker operators within certain regions of Australia and a subsequent exploitation of Backpack travellers for the sake of commercial gain. Backpacker properties have been identified by industry analysts as an attractive "cash-flow" investment which have increased the number of operators out for quick commercial gain (BRW 1989, p.133). This in turn has meant some operators have tried to reduce their overheads through conscious lapses in health, security and fire protection, by building second rate facilities, making unauthorised conversions or by allowing over-crowding in their establishments (see Cameron, 1989 p.6 and The Courier Mail, 1990 p.6).

Because of these problems facing Backpacker operators, local councils have been reviewing their building by-laws and developing legislation to control the growth of the Backpacker accommodation industry. For example, the Brisbane City Council

(Doherty, 1990 p.7), began introducing legislation to license and control Backpacker establishments with regards to fire and safety regulations.

With little data on Backpack travellers, regional planners and local governments are having difficulty substantiating the impact of the Backpacker market on local communities and the contribution of this market to tourism within the region.

2.3 Theoretical Basis for Backpack Travel

Theorists who have analysed the typologies of tourists, have primarily done so by identifying the attitudes, motives and/or travelling characteristics of tourists. Through the different approaches adopted by sociologists such as Cohen and Graburn, it is possible to infer parallels with the Backpack traveller of today in order to understand more about this type of visitor.

Cohen (1972 p. 185), used a sociological approach to develop a model based on four "roles" of the modern tourist. These four different "tourist roles" include the "organised mass" tourist, the "individual mass" tourist, the "explorer" and the "drifter".

The "Organised" and "Individual" mass tourist have been labelled by Cohen as "institutionalised" tourist roles. Cohen (1972 p.188) said,

".... and so mass tourism has created the following paradox; though the desire for variety, novelty and strangeness are the primary motives of tourism, these qualities have decreased as tourism has become institutionalised".

These tourist types can be likened to the Japanese style of international travel, whereby the tourist is relatively "safe" in the comfort zone of their "packaged" tour.

Cohen (1972 p.189) describes the "Explorer" as,

"... trying to avoid the mass tourist route and the traditional tourist attraction spots, but they nevertheless look for comfortable accommodation and a reliable means of transport. The Explorer ventures into areas relatively unknown to the mass tourist and explores them for their own pleasure. The Explorer's experience of the host country, its people, places and culture, is unquestionably much broader and deeper than that of the mass tourist."

Cohen (1972 p.190) describes the "Drifter" as,

"... seeking the excitement of complete strangeness and direct contact with new and different people. The Drifter looks for experiences, happenings and "kicks". Their mode of travel is adapted to this purpose. In order to preserve the freshness and spontaneity of their experience, the Drifter purposely travels without either itinerary or timetable, without a destination or even well-defined purpose. They are usually concerned with making their money last as long as possible and will travel, eat and sleep in the most inexpensive way possible so as to prolong their travels".

Cohen (1972 p.189) views the roles of the "Explorer" and "Drifter" as "non-institutionalised" and says each of these tourist roles are differentiated by the extent to which they venture out of their "micro-environment" and away from the tourist system, and in their attitudes toward the people and countries they visit. For example, the Backpack traveller tends to be more adventurous and willing to "pioneer" new sights, activities and experiences and become a part of the environment they are visiting.

Cohen (1972 p.189) notes the paradox of this type of travel becoming institutionalised in itself.

"Through their mode of travel, the Explorer and Drifter escape the artificiality the tourist system imposes on the mass tourist....and it is this very attempt at escape that serves as a spearhead for mass tourism".

As the Backpacker market becomes more widespread, there becomes more opportunities for exploitation, through the development of new product and marketing techniques. For example, the advent of Backpacker discount cards and franchise Backpacker accommodation establishments across the east coast of Australia has demonstrated mass marketing and direct mail techniques to attract Backpack travellers for the purposes of commercial gain.

Riley (1988 p.323) also notes this paradox in her study of long-term budget travellers when she says,

"Once the more adventuresome travellers "scope out" (identify) a new destination, it becomes defined as "safe" for others and the next step is the introduction of the amenities that appeal to the less adventurous budget travellers and eventually, perhaps, to the mass tourist, which might result in an environment no longer attractive to most long-term travellers".

The theoretical roles of the tourist outlined by Cohen help create an understanding of why people travel in different styles. The "explorer" and "drifter" are seeking different experiences and travelling for different reasons to that of the "mass" tourist.

However, it should be recognised that as a model each tourist role is separate. In practice however, tourists can fit into any of these categories at various stages of their travels. For example, Backpack travellers may venture "off the beaten track" as an

"explorer", but as part of the same trip Backpack travellers may visit tourist destinations such as Surfers Paradise and be perceived as "individual mass" tourists.

Another sociologist, Graburn (1983 p.9), identifies two types of tourism in an anthropological study on tourism rituals. Cyclical "rites of intensification" is paralleled with periodic and annual vacations, whereas "rites of passage" tourism is paralleled with what is termed "arduous, self-testing" travel. "Rites of Passage" tourism can be aligned with some of the other literature on Backpack travel, (see Riley 1988, Hawley 1989 & Pearce 1990) whereby this style of travel is seen as

"the passage of personal life from one status to another.... this often consists of prolonged absences, often arduous, which are a kind of "self-testing", wherein the individual proves to themselves that they can make the life changes" (Graburn 1983 p.12).

Graburn (1983 p.20) also identifies a "cultural self-confidence" as part of this ritual, and associates it with

"the childhood and educational experiences of the middle classes, usually those with a college education and prior travel experience who to varying degrees wish to "consume" the rest of the world, its sights, its history, its peoples and their culture".

Graburn acknowledges that people travelling for long periods away from home have different motivations compared with people on annual holidays or only on short trips away from home.

Riley (1988) in her study on long-term budget travellers and Pearce (1990) in his study of Backpackers, both outline the attitudes and motivations to travel which can be

aligned with the work of Cohen in terms of "non-institutionalised roles" and Graburn in terms of "rites of passage" tourism.

2.4 Review of Studies on Backpack Travel in Australia

Previous studies on Backpack travel in Australia were not representative of all Backpack travellers using commercial Backpacker accommodation in Queensland; however these studies do provide a framework that help identify and describe the major characteristics of the Backpack traveller that need to be investigated further.

Most of the studies reviewed in this next section were of a qualitative nature and the definition of a Backpack traveller varied with each study or was not disclosed. Also, the statistical reliability of each study was not always established, and therefore it was not possible to assume that the characteristics identified in these studies were indicative of the total Backpacker market.

Although most of the research findings from the studies outlined in this section have not been proven to be statistically reliable, there are a number of trends and patterns that have emerged. Of all the studies reviewed the Northern Territory Backpackers Survey (1990) revealed the most reliable and comprehensive information which was based on sound survey techniques.

Most of the studies reviewed indicate that Backpack travellers were predominantly under 35 years of age with a large proportion of travellers coming from overseas. The studies conducted by Pearce (1990) and the Northern Territory Backpackers Survey (1990) indicated that there were more Backpack travellers from the United Kingdom than for any other single country.

Studies conducted by the Cairns Backpacker Accommodation Association (1988), Pearce (1990) and the Northern Territory Backpackers Survey (1990) indicated that more money per day was spent by Backpack travellers on the categories of "food and beverages" and "tours and travel" than on the category of "accommodation".

The following section briefly outlines the major findings of these studies.

2.4.1 Long-Term Budget Travellers

Riley (1988) an American academic, in a study titled "Road Culture of International Long-Term Budget Travellers", used "participant observation" as a budget traveller in 1984 and 1985. Interviews and mail questionnaires supplemented Riley's observations to investigate individuals who had been part of a "road culture" for one year or more. These observations focused primarily on the travel behaviour of "long-term" budget travellers in South and South East Asia, Australia and New Zealand.

The findings of this study by Riley (1988 p.313) suggested that,

"the average traveller preferred to travel alone, was educated, European, middle class, single, obsessively concerned with budgeting his/her

money, and at a juncture in life. Many travellers were recent college graduates, delaying the transition into the responsibilities associated with adulthood in western society, or taking leave between jobs."

These findings tend to substantiate Graburn's notion of "rites of passage" tourism and "cultural self confidence" and Cohen's generalised model of "drifter/explorer" tourism roles.

Riley (1988 p.327), described Backpack travel as not merely seeking specific tourist attractions.... "but also seeking the travellers' enclaves that offer good food, fun, social interaction, and affordability. This type of travelling results in greater independence and flexibility than the fixed itinerary and limited timetable of the average tourist."

2.4.2 Yuppie Backpackers

Hawley (1989), as a journalist for the Sydney Morning Herald, recorded her experiences and observations while Backpack travelling from Sydney to Cairns during 1988 in an article titled "Yuppie Backpackers". These observations of travellers using Backpacker accommodation in New South Wales and Queensland creates an insight into the characteristics of this type of traveller.

Hawley's key observations of Backpack travellers are outlined below:

1. An estimated 70 to 90 percent of people staying in Backpacker accommodation were internationals.

2. Backpack travellers swapped information about the best places to stay, see, eat, shop, etc, and about the "rip-off joints" and local hazards to avoid.
3. Most Backpackers were between 20 and 40 years of age, with some travellers up to 70 years old. Most have completed a degree or course, worked for a few years, then set off to travel.

2.4.3 Cairns Backpackers Accommodation Association

This report titled "The Importance of Backpackers to the Cairns Economy", was commissioned in 1988 by the Cairns Backpackers Accommodation Association (CBAA) to justify the economic contribution of the Backpacker market to the Cairns economy.

This report focused primarily on Backpacker accommodation operators and identified a Backpack traveller as "a predominantly young budget traveller who typically stayed in shared room accommodation where the overnight fee was less than \$15 per night" (CBAA 1988).

The major characteristics from this study relevant to the Backpack traveller are outlined below:

1. It was estimated that over 132,000 visitors to Cairns made use of some form of Backpacker accommodation from 1 October 1987 to 30 September 1988.
2. The average length of stay during the financial year of 1987/88 was estimated at 4.1 days per Backpack traveller to Cairns.
3. Backpackers were predominantly in the age group of 15 - 35 years.
4. International Backpack travellers represented 85% of all Backpacker nights recorded in the Cairns region.
5. Backpackers used coaches as their main form of transport between destinations.
6. The proportion of the Backpackers total expenditure in Cairns between 1 October 1987 and 30 September 1988 was;

Food, Beverages & Entertainment	45.6%
Tours and Travel	32.8%
Accommodation	12.8%
Shopping & Other	8.8%
7. Total spending in Cairns between 1 October 1987 and 30 September 1988 was estimated at \$33.0 million.

8. The total average expenditure whilst within the Cairns region was estimated at \$250 per Backpack traveller. This figure can be further analysed to reveal the proportion of expenditure by category;

Food, Beverages & Entertainment	\$114
Tours and Travel	\$ 82
Accommodation	\$ 32
Shopping & Other	\$ 22

2.4.4 The Backpacker Phenomenon

Pearce in a study titled "The Backpacker Phenomenon: Preliminary Answers to Basic Questions", examined the Backpacker from a sociological perspective to identify a profile of Backpack travellers in Australia. The emphasis of Pearce's study was on attitudinal research with a strong focus on the "best experiences" which the Backpack traveller described.

Pearce (1990 p.1) outlined a sociological definition of the Backpack traveller as, "an approach to travel and holiday taking rather than a categorisation based on dollars spent or one's age".

Pearce (Pearce 1990 p.1), identified five characteristics which should be met to be considered a Backpack traveller:

1. a preference for budget accommodation
2. an emphasis on meeting other travellers
3. an independently organised and flexible travel schedule

4. longer rather than brief holidays
5. an emphasis on informal and participatory holiday activities.

The methodology used by Pearce was based on a quiz/questionnaire inserted in the free "Aussie Backpacker" magazine for the June/July, August/September and October/November 1989 issues. There were 31,000 copies of each issue produced with the publication distributed more widely in Queensland than any other state, and 596 questionnaires were completed and returned for analysis.

The major findings of Pearce's research that are applicable to this study are outlined below:

1. 92 percent of respondents were less than 30 years of age and distributed equally between males and females.

2. The distribution of nationalities was as follows;

British	38%
European/Scandinavian	28%
Australia/New Zealand	15%
North American	12%
Japanese/Asian	7%

3. The average daily expenditure by Backpack travellers was \$67.24, which as a proportion of their daily budget revealed the following;

Tours/Travel	40.7%
Food/Drink	29.8%
Accommodation	16.7%
Entertainment	12.8%

2.4.5 Northern Territory Backpacker Survey

The Northern Territory Backpacker Survey (1990) was commissioned by the Northern Territory Tourist Commission and was conducted over a 12 week period, from January to April 1990. The aim of this study was to collect detailed information on the number of Backpackers, visitor nights, average length of stay, origins, expenditure patterns and general visitor characteristics of Backpackers in the Northern Territory.

The survey component of this study included 876 "Face-to-Face" questionnaires and 375 "Self-Completion" questionnaires. The survey was designed to complement Backpacker results from the Northern Territory Travel Monitor to enable some estimates of Backpacker activities for the full year 1989/90.

This study defined Backpackers as users of "guest house/hostel accommodation" and included "short-term" (less than 90 nights) and "long-term" (more than 90 nights) visitors to the Northern Territory.

The major findings from the Northern Territory Travel Monitor applicable to "short-term" Backpackers during 1989/90 in the Northern Territory are outlined below;

1. During 1989/90 it was estimated there were 68,000 "short-term" Backpack travellers, spending 510,000 nights in the Northern Territory at an average length of stay of 7.5 nights.

2. Visitors from overseas represented 91.2% of all Backpack travellers. The average length of stay was 8.5 nights for Australian Backpack travellers and 7.4 nights for overseas visitors.

3. Expenditure by "short-term" Backpack travellers over the 1989/90 financial year was estimated at \$52.00 per visitor night, producing a total expenditure of \$26.2 million. As a proportion of the Backpack travellers' average spending per visitor night, the following break-down was revealed;

Transport/Tours	50.0%
Food/Drinks	21.2%
Accommodation	17.3%
Pleasure Shopping/Gifts	7.7%
Other	3.8%

The following findings refer specifically to the Northern Territory Backpacker Survey period between January and April 1990 and includes "long-term" and "short-term" Backpack travellers;

1. Overseas Backpack travellers represented 90.2% of all respondents. The proportional break-down for the origin of Backpack travellers to the Northern Territory is recorded below;

United Kingdom	39.4%
Europe/Scandinavia	34.8%
Australia/New Zealand	10.9%
North America	10.4%
Japan	3.0%
Other	1.5%

2. Of all respondents, 55.4% were male and 44.6% were female. The age distribution of all respondents was;

18 - 24 years	50.8%
25 - 34 years	42.9%
35 + years	6.3%

3. The occupational status of respondents from the Northern Territory Backpacker Survey was distributed as follows;

Professional	24.3%
Clerical/Sales	20.0%
Technical/Trade	19.7%
Student	18.4%
Semi-skilled	9.5%
Other	8.5%

4. The main type of transport used to enter the Northern Territory as a proportion of all respondents was;

Coach/Bus	58.9%
Air	21.5%
Private Vehicle	12.2%
Other	7.4%

5. The main source of information used by Backpack travellers for planning their trip in the Northern Territory was recorded as a proportion of all respondents;

Word of Mouth	36.9%
Backpacker Magazine/Guide	35.6%
Travel Agent/Brochure	11.9%
Other	6.6%
No Source	9.0%

2.5 Summary of Literature Review

According to the literature, the Backpack traveller of today emerged from a combination of factors including;

1. the development of technology enabling more convenient travel
2. an increased emphasis by society on leisure and environmental activities
3. the development of a "value-for-money" accommodation system and
4. motivating factors such as "escapism" from more familiar surroundings and/or the "seeking" of different educational, social and cultural experiences.

The attributes of the "explorer/drifter" and the "rites of passage" tourism theories developed by Cohen and Graburn can be aligned with the characteristics described by studies on Backpack travel by Adler (1985), Riley (1988), Cairns Backpackers Accommodation Association (1988), Pearce (1990) and the Northern Territory Tourist Commission (1990).

The accommodation system that has been established for Backpack travellers in Australia provides an important base for travellers to pursue their goals and meet other travellers with similar ideals. However, the development of Backpacker accommodation through youth hostels and commercial Backpacker operators has led to problems of uncontrolled development and negative exploitation of Backpack travellers. Local councils and governments have begun introducing controls through legislation for the licensing of Backpacker establishments, however there has been

very little data on Backpack travellers in Queensland that governments and planning bodies can use as a basis for their decisions.

Most of the previous studies on Backpack travel do not accurately establish the size and impact of the Backpacker market in Australia. Studies by Riley (1988), and Pearce (1990) focussed primarily on the motivation and experiential factors linked to Backpack travel. Studies by the Cairns Backpackers Accommodation Association (1988) and the Northern Territory Tourist Commission (1990) used Backpacker accommodation establishments to gauge the size of the Backpacker market for their respective regions and identified certain characteristics of this market.

The major market characteristics and variables identified by the previous studies on Backpack travel in Australia include;

1. the country of origin for Backpack travellers in Australia
2. the age and sex distribution of Backpack travellers
3. the previous occupation and educational status of Backpack travellers
4. the expenditure patterns of Backpack travellers
5. the mode of transport Backpack travellers use
6. the places and regions Backpack travellers visit
7. and the type of activities/experiences Backpack travellers engage in.

It is these characteristics that this study analyses further, however the literature review already outlines a number of common characteristics and emerging trends from the limited information available on this market. The travel patterns of the Backpacker

suggests that this segment is largely from overseas, does not spend a lot of money on accommodation, are predominantly young and well educated, enjoy experiencing other cultures, pursue activities that they can not enjoy in their own country, find out about places and things to do by "word of mouth", maintain a flexible itinerary and do not consider themselves as the typical tourist.

By quantifying some of the travel characteristics of Backpack travellers in Queensland it is possible to identify how closely aligned Backpack travellers in Queensland are to the total "holiday" travel market in Queensland. The methodology used to identify the size of the Backpacker market in Queensland and how these market characteristics were analysed is detailed in Chapter 3.0.

CHAPTER 3.0 RESEARCH DESIGN

This chapter discusses the research process as it applies to tourism and qualifies the research approach used to assess Backpack travellers using commercial Backpacker accommodation in Queensland.

Tourism research is still in an early stage of development when compared with other research fields (see McIntosh & Goeldner 1986, p.438 and Middleton 1988, p.108).

Tourism research can be considered a sub-category of behavioural and economic research in general, and as such the research methodology, measurement theory and data collection methods developed in these fields have been adapted for the tourism researcher (Ritchie in McIntosh & Goeldner 1986, p.441).

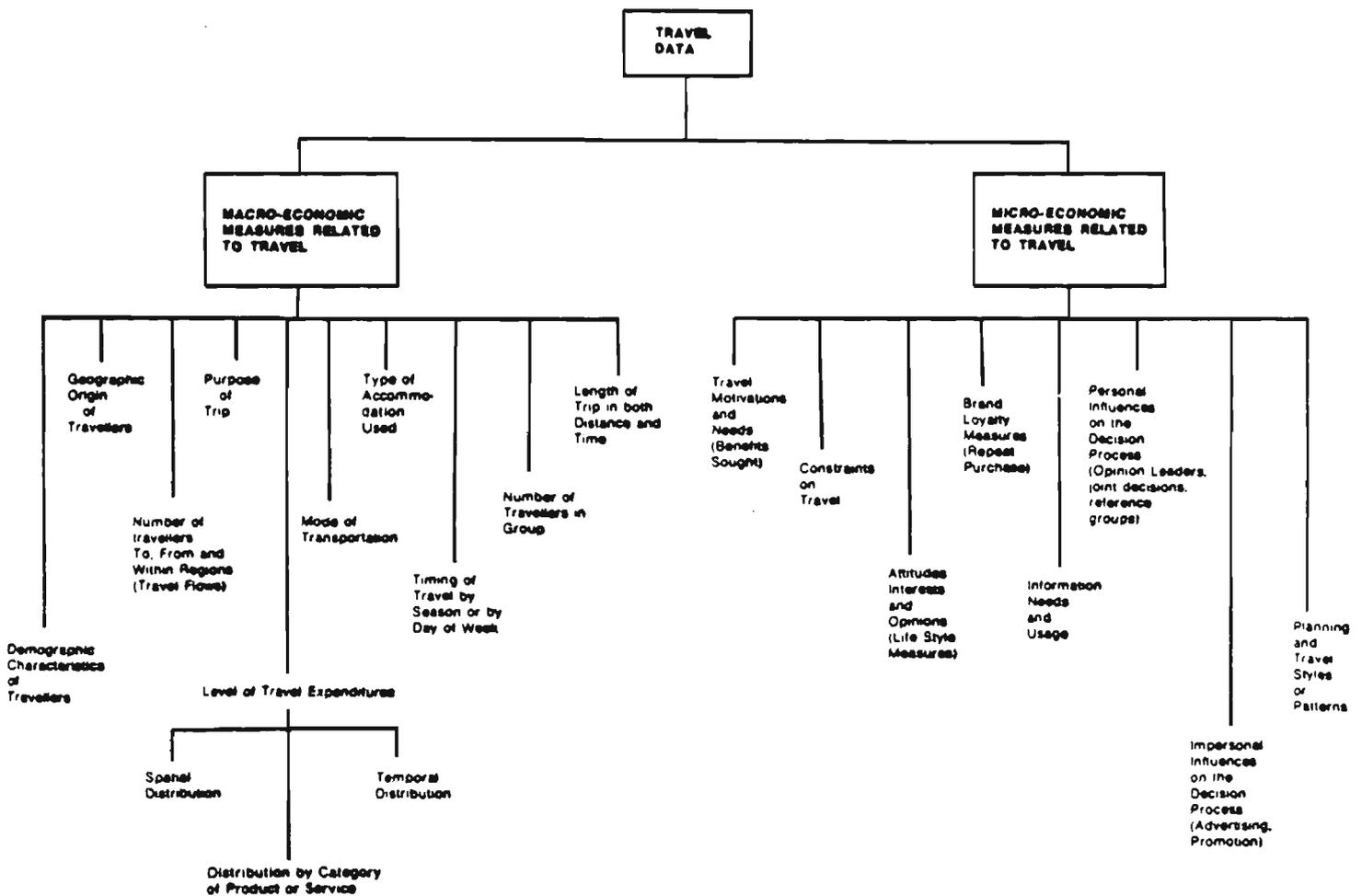
According to Ritchie (in McIntosh & Goeldner 1986 p.438), tourism and travel related data can be usefully classified into two major categories which are outlined in Figure 3.0(a).

1. Macro-economic data relating to travel consists of descriptive statistics which provide an overview of the level and mix of the travel population and their expenditures. This type of data is considered essential for the forecasting of total demand, for evaluating economic impact and for evaluating the effectiveness of different types of development and promotion programmes.

2. Micro-economic data relating to travel is primarily concerned with answering questions as to "why" individuals travel and "how" they reach specific travel decisions. This type of research concentrates on understanding the impact of different variables across the various stages of the decision process.

Figure 3.0(a): Classification of Travel Related Data.

(Source: McIntosh & Goeldner 1986 p.439)



This study uses a market analysis approach which can be considered a hybrid of tourism research and market demand analysis, whereby marketing principles are applied to tourism research to further understand a particular segment of the tourism industry.

Compatible with Ritchie's model of "macro-economic" tourism research, Witt and Moutinho (1989, p.239), suggest that market analysis consists of four steps:

1. Identifying a market
2. Identifying market factors
3. Estimating market potential
4. Estimating revenue

These steps suggested by Witt and Moutinho (1989) and the "macro-economic" model of tourism research developed by Ritchie are closely aligned to the approach used in this study. After having defined the research objectives for this study and consulting the secondary data available on Backpack travel, the next stage for this study was to develop a research design that would analyse the Backpacker market in Queensland.

3.1 The Research Process

Researchers divide the research process into a series of stages, with each stage influencing each other stage to varying degrees. Although these research stages vary from individual to individual, the recognition of a sequence is universal (see Clover &

Balsley 1984, McIntosh, Robert & Goeldner 1986, Ritchie & Goeldner 1987, Middleton 1988 and Witt & Moutinho 1989).

This study was based on the following sequential stages:

1. Formulation of research problem
2. Review of related research
3. Definition of characteristics, variables and objectives
4. Selection of research design
5. Selection of data collection technique
6. Selection of subjects
7. Planning of data processing and analysis
8. Reporting of research results.

The other factors contributing to the type of research methods employed for this study included:

1. the type of variables and nature of the objectives to be analysed,
2. existing tourism research methods used in Queensland,
3. time and cost constraints,
4. and the financial support and needs of the QTTC.

Pizam (in Ritchie & Goeldner, 1987 p.71), outlined three main methods for information for research. Firstly, data could be obtained by the investigator observing the phenomena. This method was used by Riley (1988) and Hawley (1990) in their studies of Backpack travellers. Secondly, data could be obtained by the investigator

communicating directly with the subjects. This method was used in the Cairns Backpacker Accommodation Association study (1988) and by Pearce (1990) in his study of Backpacker's experiences. Thirdly, data could be obtained from other sources which had already collected it for another purpose, such as information collected by the Bureau of Tourism Research or the Australian Bureau of Statistics.

This study developed a combined approach which used data from existing sources and data obtained directly from Backpack travellers based on the Major Survey Research Programme commissioned by the Queensland Tourist and Travel Corporation.

3.2 The Research Instrument

This market analysis study of Backpack travellers in Queensland is quantitative in nature and therefore one of the aims of this research is to gain information from a representative number of Backpack travellers using Backpacker accommodation in order to draw inferences about the population at large.

There are two main types of surveys used in tourism research for collecting quantitative data. Both survey types rely on the information required and the resources available for the economic use of a particular research instrument.

The two different types of surveys are:

1. Household surveys
2. Enroute surveys

3.2.1 Household Surveys

Household surveys which interview respondents at their place of origin provide valuable perspective on the incidence of travel and can identify useful relationships between travel and various other factors. This method is used by the Bureau of Tourism Research for the Domestic Tourism Monitor and collects valuable information on the socio-demographic and travel characteristics of domestic travel in Australia.

However, there are various limitations to using this technique that apply to this study on Backpack travel in Queensland and therefore discounts the use of this approach:

1. Secondary data reported a high incidence of international Backpack travellers. These travellers would not be represented by a household survey.
2. Household surveys have an inherently high recall failure rate, therefore the extended travel patterns by Backpack travellers would increase the probability of less accurate recall of the trip details - particularly with respect to expenditure.

3. There is a practical difficulty of targeting frequent travellers in household surveys, because they are often away from their usual place of residence.

3.2.2 Enroute Surveys

Enroute surveys are designed to select travellers on the move, while they are making their trip. Therefore, enroute surveys reduce many of the problems encountered with household survey methods. Enroute surveys also make it easier to target a specific population and locate specific markets.

According to Hurst (in Ritchie & Goeldner, 1987 p.402), the quality of response to an enroute survey is often determined by the time and place when the survey is administered. Therefore, the point at which a traveller is selected for inclusion in an enroute survey is a vitally important consideration in the design of the research instrument.

Enroute surveys using individual interviewers at the travellers destination alleviates many of the problems associated with recall and response rates mentioned previously. Using enroute surveys at accommodation establishments, Hurst (in Ritchie & Goeldner, 1987 p. 403), suggests that the quality of response will be higher when the respondent is enjoying the comfort and security of their accommodation, and not while travellers are waiting impatiently at "check-in" lines or while waiting for transport.

The Major Survey Research Programme commissioned by the Queensland Tourist and Travel Corporation uses an enroute survey method which targets users of commercial accommodation establishments throughout Queensland and interviews respondents in the relative comfort and security of their accommodation.

The advantage of using this type of research instrument for this Backpacker study was that both domestic and international Backpack travellers could be identified by the type of accommodation used and a sample selected from a known population based on the number of beds at each establishment.

3.3 Major Survey Research Programme (MSRP) Methodology for Backpack Travellers

This market analysis study on Backpack travellers in Queensland used the Major Survey Research Programme (MSRP) conducted by the National Centre for Studies in Travel and Tourism which was commissioned by the Queensland Tourist and Travel Corporation (QTTC) for the 1989/90 financial year. The MSRP was first commissioned in 1982, and is designed to obtain information on visitor characteristics on a regional and State level for users of commercial accommodation throughout Queensland.

The Backpacker component of the MSRP, as an enroute survey, used the total number of Backpacker beds in all Backpacker accommodation establishments in Queensland, in order to identify a representative sample of Backpack travellers. By

using this research instrument it was possible to compare the Backpacker market in Queensland with the MSRP data produced for all "holiday" users of commercial accommodation in Queensland. The methodology used for the total MSRP for users of commercial accommodation in Queensland is shown in Appendix 1.

3.3.1 Classification of MSRP Regions

The 1989/90 regional boundaries for the MSRP were defined to closely align with the Australian Bureau of Statistics' - Statistical Divisions. The Backpacker component of the MSRP for 1989/90 identified the following major regions based on the number of Backpacker beds in each region:

Brisbane	1,175 beds
Mackay/Proserpine	1,130 beds
Townsville/Bowen	1,511 beds
Cairns/Tablelands	3,537 beds
Other Queensland	1,853 beds
Total Queensland	9,206 beds

Appendix 2 shows the distribution of Backpacker establishments in Queensland and the number of Backpacker beds for each region as at June 30 1990.

3.3.2 The MSRP Sampling Frame for Backpack Travellers

This survey was designed to provide estimates for the characteristics of Backpack travellers in Queensland based on a representative selection of carefully chosen population elements. The Backpacker component of the MSRP was designed to provide as much accuracy as possible within the accepted cost constraints in order to meet the research objectives outlined in Chapter 1.2.

The selection of the sample of Backpack travellers was based on the number of Backpacker establishments and the number of beds in each establishment during the survey period of 1989/90. By selecting beds in Backpacker establishments, it was possible to identify Backpack travellers as well as estimate the total Backpack traveller population in Queensland based on the bed occupancy rate for Backpacker accommodation establishments within the regions of Queensland.

The sampling frame of Backpacker accommodation establishments in Queensland was developed by the National Centre for Studies in Travel and Tourism and is periodically updated using data from a variety of sources including; accommodation guides, Backpacker magazines, QTTC lists, Regional Tourism Authority lists, telephone directories and various internal sources. In addition, field inspections were used where necessary, to update current information on Backpacker establishments.

Although all care was used in constructing the sampling frame of Backpacker accommodation establishments, it should be recognised that a "gap" may have existed

between the actual population and the sampling frame used, due to the dynamic nature of the Backpacker accommodation market in Queensland.

3.3.3 The MSRP Sample Design for Backpack Travellers

The use of sampling is a process to describe the activity of selecting a few from the total and using the characteristics of a few to estimate the characteristics for the whole. How the selection of the few is done largely determines the accuracy of the estimates derived from that sample (see Cannon in Ritchie & Goeldner, 1987 p.102).

The aim of this sample design was to ensure that, in a statistical sense, the sample was representative of the population. To achieve this it was necessary that each and every element in the population had a known probability of being included in the sample.

This sample design used the known number of Backpacker beds over 1989/90, and therefore the sampling unit being measured was Backpacker beds based on a representative sampling process. In the final analysis, the number and characteristics of Backpack travellers was calculated on the basis of occupancy rates and lengths of stay.

The Backpacker component of the 1989/90 MSRP grouped the Backpacker accommodation establishments according to the regions described in Appendix 2. For

example, the most significant regions in terms of the number of Backpacker beds occurred in Brisbane, Mackay/Proserpine, Townsville/Bowen and the Cairns/Tablelands regions. The Backpacker establishments for each region were then "stratified" according to the number of beds in each establishment.

An important factor that was considered for this sample design was the effect of seasonality during the survey period. This sample design incorporated a degree of flexibility in the construction of the sampling frame during the 1989/90 survey period to allow for the sampling process to be spread over the full year. The sample selection was determined on a quarterly basis and adjusted to allow for any changes in the sampling frame. This approach therefore allowed for the dynamic nature of travel over time.

The sampling process involved sampling beds within selected establishments. At the stage of selecting establishments, variations in an establishments' size contributed to sampling error. However, stratification by size as far as was practical and by using "probability proportional to size" selection within strata, the efficiency of the final estimates was increased. With "probability proportional to size" selection the probability of an establishment being selected varied depending on the number of beds it contained. For example, if one establishment contained fifty beds whilst another Backpacker establishment only had ten beds, sampling bias would be evident. Therefore it becomes necessary to adjust the sampling process so that each establishment has an equal chance of being selected regardless of the number of beds.

As the population of visitors varied from day to day, the sample must aimed to achieve a representative spread over time. Thus, interviewers' "workloads" were designed for specified sample days, as well as for specified establishments. Each such workload was determined so as to be as heterogeneous as possible within the sampled establishment to further minimise potential sampling error.

Practicality issues were also taken into consideration in this sampling design. Difficulties encountered in contacting occupants of sampled Backpacker beds on the sampled day, reduced the extent to which a manageable "workload" for interviewers could be constructed, allowing for time and cost constraints. The activities of Backpack travellers reduced the time period in which an interviewer could make contact with a selected respondent on a selected day. Therefore interviewers called late in the afternoon or early evening and were required to make "call backs" to ensure the non-response rate was kept to an acceptable level.

To help ensure maximum response rates, managers of Backpacker accommodation establishments were notified by an official letter of introduction from the QTTC and professional interviewers were employed. An advantage in using the Major Survey Research Programme (MSRP) conducted by the Queensland Tourist and Travel Corporation ensured that interviewer training and field techniques remained consistent with that used for all commercial accommodation operators. The MSRP has been in use since 1982/83 and has therefore developed a comprehensive interviewers manual which outlines a number of approaches to use when requesting the operator and respondent to co-operate.

All sampling designs are liable to problems encountered in executing the design. This enroute sampling design, defined a procedure for selecting a representative number of Backpacker beds through various stages of sampling. Failures to this procedure may have occurred at any stage of the design. For example, a field interviewer may not have fulfilled their appointed "workload", an interviewer may have failed to follow the sampling procedure, or a selected subject may have failed to respond to a questionnaire. These problems could affect the ultimate estimates, therefore control measures such as auditing the performance of the survey, and the use of "call-back" techniques were introduced to minimise the chance that the quality of the ultimate estimates would not be weakened.

Table 3.3.3(a) indicates the number of Backpack travellers interviewed for the major Backpacker regions of Queensland during the 1989/90 financial year.

Table 3.3.3(a): Sample Number of Backpacker Respondents per Major Backpacker Region in Queensland - 1989/90

MAJOR REGION OF QUEENSLAND	NUMBER OF BACKPACKER RESPONDENTS
BRISBANE REGION	868
MACKAY/PROSERPINE	914
TOWNSVILLE/BOWEN	1,115
CAIRNS/TABLELANDS	1,458

3.3.4 Estimation of MSRP Survey Results for Backpack Travellers

Estimation of the size, characteristics and expenditure of Backpack travellers using commercial Backpacker accommodation in Queensland was possible from the surveyed sample by "weighting" each response, with the variable to be measured.

As noted earlier, the sampling design was based on a known number of Backpacker beds at a selected Backpacker accommodation establishment for a particular day during the 1989/90 survey period. Therefore by using occupancy rates of the sampled Backpacker establishments, it was possible to estimate the total number of Backpacker nights in Queensland, during the 1989/90 financial year.

The Backpacker component of the MSRP, by design, was sampling Backpacker nights (beds), therefore the number of Backpack travellers in Queensland was calculated by "weighting" inversely by the length of stay to estimate characteristics relating to the number of Backpack "visitors" to a region.

The National Centre for Studies in Travel and Tourism has developed formulae for all MSRP data to "weight" the sampled survey in order to make estimations. These formulae account for factors such as occupancy rate, seasonality, non-response to questions, disproportional sampling, the probability of selection, the length of stay and the variable to be measured.

3.3.5 The MSRP Questionnaire for Backpack Travellers

According to Pizam (in Ritchie & Goeldner, 1987 p.72), the most important goal of a questionnaire is to provide complete, valid and reliable information from respondents. To this end, trained interviewers were employed to administer structured MSRP questionnaires as the primary data collection technique. As a survey instrument, the questionnaire required careful design to avoid any inherent bias in order to preserve the intent of this study.

The questionnaire used for the Backpacker component of the MSRP for the 1989/90 financial year used the same format as that of the "Visitor Survey" used for the analysis of all travellers using commercial accommodation in Queensland. By using this

approach, a direct comparison of Backpack travellers using commercial Backpacker accommodation with the total commercial accommodation "holiday" market was possible. A copy of the MSRP questionnaire is shown in Appendix 3.

A supplementary Backpacker questionnaire was also administered during the June quarter 1990, aimed at gathering additional specific information on Backpack travellers.

A copy of the supplementary Backpacker questionnaire is shown in Appendix 4.

The MSRP questionnaire was developed in consultation between QTTC and the National Centre for Studies in Travel and Tourism. As a universal instrument used to collect data from all commercial accommodation establishments in Queensland, interviewers were instructed to adapt certain questions to suit the requirements for data collected from Backpack travellers.

3.3.6 MSRP Data Processing and Analysis for Backpack Travellers

The data processing and statistical analysis of the Backpacker component of the MSRP 1989/90 survey and the Supplementary Backpacker questionnaire for the June quarter 1990, was processed and analysed in consultation with the QTTC and the National Centre for Studies in Travel and Tourism. This process allowed the data that was collected to be arranged in such a way that it provided for meaningful interpretation and comparison with existing MSRP data.

The data collected from the Backpacker component of the MSRP questionnaire was coded for computer analysis and subjected to a "filtering" process to identify Backpack travellers based on the operational definition described in Chapter 1.5.

This process therefore excluded the analysis of respondents who were mainly travelling for "business" purposes or using Backpacker accommodation establishments as part of an "educational or school excursion".

Initial survey questions "screened" subjects to ensure the respondents included were within the QTTC definition of a tourist. That is, subjects were not included if they usually lived within forty kilometres of the Backpacker establishment or they had spent more than ninety consecutive nights within the same surveyed region and were therefore considered as "permanent".

The remaining respondents were identified as Backpack travellers and the data collected was analysed in accordance with the objectives outlined in Chapter 1.2.

To allow comparisons of Backpacker characteristics to be made with the data available from the MSRP for the total commercial accommodation "holiday" market in Queensland, the data was analysed as proportions of the estimates for Backpack travellers and Backpacker nights. The use of percentages allowed the data to be more easily understood, than if the data was left in its numeric form.

It should be noted that the MSRP "holiday" travel market also aggregated data for Backpack travellers and therefore comparisons have been made with the total MSRP "holiday" market which also includes Backpack travellers.

By further cross-classifying the data, it was possible to obtain more detailed information from the data. Where possible, each variable measured for the Backpacker component of the survey was cross-tabulated with the respondents' "usual place of residence" and compared with similar existing analyses for the total commercial accommodation "holiday" market. This process identified domestic and international Backpack traveller characteristics.

In addition to the data obtained to compare the Backpacker market with the total commercial accommodation "holiday" market in Queensland, descriptive data on other travel characteristics of the Backpack traveller was computed, in order to answer the other research questions raised in Chapter 1.2.

CHAPTER 4.0 RESEARCH FINDINGS

This chapter presents results from the analysis of data for the Backpacker survey and compares this data with the total "holiday" travel market analysed as part of the Major Survey Research Programme for the financial year 1989/90.

The data generated on Backpack travellers using commercial Backpacker accommodation in Queensland analyses the size of the Backpacker market in Queensland, as well as expenditure, transport and selected socio-demographic characteristics. Where applicable, this data was cross-classified with the respondents "usual place of residence" and "region of stay" in Queensland. This type of analysis allows the data to be disaggregated in order to identify domestic and international Backpack travel characteristics and to identify the major regions of Queensland that attract this type of traveller.

Each of the objectives outlined in Chapter 1.2 have been analysed to allow a comparison of the Backpacker market with the total commercial "holiday" market in Queensland.

Additional results from the analysis of data for the Backpacker component of the MSRP survey and the supplementary questionnaire administered for the June quarter 1990 are also presented in this chapter.

4.1 Size of the Backpacker Market

The estimated size of the Backpacker market in Queensland compared with the estimated total number of "holiday" users of commercial accommodation in Queensland was measured in terms of "nights" and visitors". This information was further disaggregated by international and domestic travellers and classified by the major Backpacker regions of Queensland.

Backpacker Nights Compared with "Holiday" Visitor Nights

Table 4.1(a) shows the estimated number and market share for Backpacker nights spent within the major Backpacker regions of Queensland compared with the total estimated number of "holiday" visitor nights spent in commercial accommodation in Queensland during 1989/90.

**Table 4.1(a): Backpacker Nights Compared With Total MSRP
"Holiday" Visitor Nights in Queensland - 1989/90.**

REGION/ Origin	BACKPACKER NIGHTS	MARKET SHARE of MSRP	TOTAL MSRP "HOLIDAY" NIGHTS
BRISBANE REGION			
Australia	41,701	3.6%	1,173,200
Overseas	156,579	22.5%	694,500
TOTAL	198,280	10.6%	1,867,700

MACKAY/PROSERPINE			
Australia	52,246	3.8%	1,368,700
Overseas	123,691	27.9%	443,600
TOTAL	175,937	9.7%	1,812,300

TOWNSVILLE/BOWEN			
Australia	36,772	3.9%	943,500
Overseas	148,449	35.5%	417,800
TOTAL	185,221	13.6%	1,361,300

CAIRNS/TABLELANDS			
Australia	121,673	6.1%	2,007,500
Overseas	434,222	25.1%	1,727,300
TOTAL	555,895	14.9%	3,734,800
=====			
SUBTOTAL OF REGIONS			
Australia	252,392	4.6%	5,492,900
Overseas	862,941	26.3%	3,283,200
TOTAL	1,115,333	12.7%	8,776,100

TOTAL QUEENSLAND			
Australia	460,756	2.1%	21,861,500
Overseas	1,054,640	18.8%	5,605,100
TOTAL	1,515,396	5.5%	27,466,600

- * Overall, the total number of Backpacker nights spent in Queensland represented 5.5 percent of all "holiday" nights spent in commercial accommodation during 1989/90.

This impact becomes more significant when the proportion of international visitor nights spent in Queensland was measured.

- * Backpacker nights spent in Queensland by international Backpack travellers represented 18.8 percent of all nights spent by international visitors on "holiday" using commercial accommodation in Queensland.

Another significant impact on the size of the Backpacker market was the number of nights spent in Queensland by international Backpack travellers as a proportion of all Backpacker nights, compared with the proportion of all international "holiday" nights spent in Queensland.

- * The number of nights spent by international Backpack travellers represented 69.6 percent of all Backpacker nights spent in Queensland during 1989/90. The number of nights spent by international "holiday" visitors in Queensland represented 20.4 percent of all "holiday" nights spent in Queensland during 1989/90.

These results support the studies by Riley (1988), the Cairns Backpackers Accommodation Association (1988), Hawley (1989), Pearce (1990) and the Northern

Territory Backpacker Survey (1990) which also revealed a high proportion of international Backpack travellers.

The market share of Backpacker nights compared with all "holiday" nights spent in commercial accommodation was more significant in the four major Backpacker regions of Brisbane, Mackay/Proserpine, Townsville/Bowen and Cairns/Tablelands.

The impact of Backpacker nights spent within the four major Backpacker regions of Queensland was comparatively higher when the same regions were measured for all "holiday" nights spent in Queensland.

- * The sub-total of the four major Backpacker regions of Queensland represented 73.6 percent of all Backpacker nights spent in Queensland. The sub-total of the same regions for all "holiday" nights spent in Queensland represented 32.0 percent of all "holiday" nights during 1989/90.

Backpack Travellers Compared with "Holiday" Visitors

Table 4.1(b) shows the estimated number and market share for Backpack travellers within the major Backpacker regions of Queensland compared with the estimated total number of "holiday" visitors using commercial accommodation in Queensland during 1989/90.

**Table 4.1(b): Backpack Travellers Compared With Total MSRP
"Holiday" Visitors in Queensland - 1989/90.**

REGION/ Origin	BACKPACK TRAVELLERS	MARKET SHARE of MSRP	TOTAL MSRP "HOLIDAY" VISITORS
BRISBANE REGION			
Australia	10,086	2.4%	413,200
Overseas	42,184	20.9%	202,200
TOTAL	52,270	8.5%	615,400

MACKAY/PROSERPINE			
Australia	8,113	2.3%	358,800
Overseas	24,590	22.7%	108,200
TOTAL	32,703	7.0%	467,000

TOWNSVILLE/BOWEN			
Australia	9,555	3.4%	277,600
Overseas	31,677	27.3%	116,200
TOTAL	41,232	10.5%	393,800

CAIRNS/TABLELANDS			
Australia	23,540	7.8%	300,600
Overseas	52,147	18.4%	283,200
TOTAL	75,687	13.0%	583,800
=====			
SUBTOTAL OF REGIONS			
Australia	51,294	3.8%	1,350,200
Overseas	150,598	21.2%	709,800
TOTAL	201,892	9.8%	2,060,000

TOTAL QUEENSLAND			
Australia	69,098	1.8%	3,793,400
Overseas	98,096	13.8%	711,700
TOTAL	167,194	3.7%	4,505,100

- * Overall, the total number of Backpack travellers in Queensland represented 3.7 percent of all "holiday" visitors using commercial accommodation during 1989/90.

Similarly to the results recorded for the number of Backpacker nights spent in Queensland, the impact from the number of Backpack travellers in Queensland was greater for international Backpack travellers when compared to international "holiday" visitors, particularly for the four major Backpacker regions of Queensland.

- * International Backpack travellers in Queensland represented 13.8 percent of all international visitors on "holiday" using commercial accommodation in Queensland.

The impact of Backpack travellers within the four major Backpacker regions of Queensland was significantly higher when the same regions were compared with all "holiday" visitors in Queensland. It should be noted that a visitor may visit more than one region whilst on the same trip, therefore the number of visitors to every region in Queensland does not equal the total number of visitors in Queensland during 1989/90.

- * The sub-total of the four major Backpacker regions of Queensland represented 120.1 percent of all Backpack travellers in Queensland. The sub-total of the same regions for all "holiday" visitors in Queensland represented 45.7 percent of all "holiday" visitors during 1989/90.

From the data for the four major Backpacker regions of Queensland, the results reveal that whilst on the same trip Backpack travellers were more inclined to visit other major Backpacker regions of Queensland compared with "holiday" visitors. These results support the suggestion by Hawley (1989), that Backpack travellers, due to their extended trip, visit more places than the more traditional type of tourist.

4.2 Expenditure by Backpack Travellers

To measure the contribution of expenditure by Backpack travellers to the total commercial accommodation "holiday" market in Queensland, the estimated total expenditure by all Backpack travellers was compared with the estimated total expenditure of all "holiday" visitors using commercial accommodation.

The type of expenditure by Backpack travellers in Queensland was also compared with the type of expenditure by all "holiday" users of commercial accommodation in Queensland, during the 1989/90 financial year, in order to compare the average expenditure per night for each expenditure category.

Expenditure by Backpack travellers and "holiday" users of commercial accommodation, covered all cash outlays on accommodation and other out of pocket expenses. Transport costs within Queensland were covered, but expenditure on the main transport used to arrive in Queensland was excluded.

Total Expenditure by Backpack Travellers Compared with "Holiday" Expenditure

Table 4.2(a) shows the estimated total expenditure by Backpack travellers in Queensland compared with existing MSRP data for the estimated total expenditure by all "holiday" visitors using commercial accommodation in Queensland during 1989/90. This information was further disaggregated by international and domestic travellers and classified by the major Backpacker regions of Queensland.

Table 4.2(a): Total Expenditure by Backpack Travellers Compared With Total MSRP "Holiday" Expenditure in Queensland - 1989/90.

REGION/ Origin	BACKPACKER EXPENDITURE	MARKET SHARE of MSRP	TOTAL MSRP "HOLIDAY" EXPENDITURE
BRISBANE REGION			
Australia	\$2,991,906	2.9%	\$101,672,270
Overseas	\$9,801,899	10.1%	\$96,674,400
TOTAL	\$12,793,805	6.5%	\$198,346,670

MACKAY/PROSERPINE			
Australia	\$3,439,752	2.3%	\$146,993,650
Overseas	\$15,437,004	27.0%	\$57,180,040
TOTAL	\$18,876,756	9.2%	\$204,173,690

TOWNSVILLE/BOWEN			
Australia	\$1,044,011	1.6%	\$66,019,050
Overseas	\$5,835,165	21.4%	\$27,324,120
TOTAL	\$6,879,175	7.4%	\$93,343,170

CAIRNS/TABLELANDS			
Australia	\$8,323,595	4.9%	\$169,148,300
Overseas	\$27,837,524	14.3%	\$195,184,900
TOTAL	\$36,161,119	9.9%	\$364,333,200
=====			
SUBTOTAL OF REGIONS			
Australia	\$15,799,264	3.3%	\$483,833,270
Overseas	\$58,911,592	15.7%	\$376,363,460
TOTAL	\$74,710,856	8.7%	\$860,196,730

TOTAL QUEENSLAND			
Australia	\$30,048,043	1.9%	\$1,563,094,720
Overseas	\$74,732,054	11.8%	\$633,936,810
TOTAL	\$104,780,097	4.8%	\$2,197,031,530

- * Overall, the total expenditure by Backpack travellers in Queensland represented 4.8 percent of all expenditure by "holiday" visitors using commercial accommodation in Queensland during 1989/90.

The contribution of expenditure by Backpack travellers was more significant when the expenditure by international Backpack travellers was compared with the expenditure by international "holiday" visitors using commercial accommodation in Queensland during 1989/90.

- * Expenditure by international Backpack travellers represented 11.8 percent of expenditure for all international "holiday" visitors using commercial accommodation in Queensland during 1989/90.

The contribution of expenditure by international Backpack travellers in Queensland was more significant as a proportion of all Backpacker expenditure in Queensland compared with the proportion of expenditure by international "holiday" visitors using commercial accommodation in Queensland during 1989/90.

- * The total expenditure by international Backpack travellers represented 71.3 percent of all Backpacker expenditure in Queensland during 1989/90. The total expenditure by international "holiday" visitors represented 28.8 percent of all "holiday" visitors using commercial accommodation in Queensland during 1989/90.

This data helps support the statement by O'Clery (1989) that Backpack travellers contribute significantly to the Australian economy, in terms of expenditure by international Backpack travellers.

The impact of total expenditure by Backpack travellers within the four major Backpacker regions of Queensland was significantly higher when the same regions were compared with all "holiday" visitors using commercial accommodation in Queensland.

- * The combined total of expenditure for the four major Backpacker regions of Queensland represented 71.3 percent of all Backpacker expenditure in Queensland. The combined total of the same regions for all expenditure by "holiday" visitors using commercial accommodation in Queensland represented 39.2 percent, during 1989/90.

Average Expenditure per Visitor Night compared with "Holiday" Expenditure

Table 4.2(b) shows the estimated average expenditure per visitor night by the type of expenditure category for Backpack travellers compared with the estimated average expenditure for all "holiday" visitors using commercial accommodation during 1989/90. The expenditure categories include - spending on accommodation, food and beverages, pleasure shopping, local transport/tours and "other" items.

Table 4.2(b): Average Expenditure per Visitor Night Compared With Total MSRP "Holiday" Expenditure in Queensland - 1989/90.

REGION/ Market Sector	----- EXPENDITURE CATEGORY ----- (\$ per visitor night)					AVERAGE
	Accomm.	Food/ Beverage	Pleasure Shopping	Local T/port	Other	
TOTAL QUEENSLAND						
Backpacker Exp.	\$10.74	\$19.12	\$9.69	\$23.18	\$6.23	\$68.96
% of Backpacker Exp.	15.6%	27.7%	14.1%	33.6%	9.0%	100.0%
MSRP "Holiday" Exp.	\$22.30	\$20.00	\$16.50	\$14.80	\$6.40	\$80.00
% of "Holiday" Exp.	27.9%	25.0%	20.6%	18.5%	8.0%	100.0%

- * On average, Backpack travellers in Queensland spent \$68.96 per visitor night compared with \$80.00 per visitor night spent by "holiday" visitors using commercial accommodation in Queensland during 1989/90.

These results reflect a higher average daily expenditure than that revealed by the Northern Territory Backpacker Survey (1990) and supports the study by Pearce (1990) for estimates of Backpacker expenditure in Queensland.

Backpack travellers spent more money per visitor night on local transport/tours than "holiday" visitors using commercial accommodation, whereas "holiday" visitors spent more money per visitor night on accommodation during 1989/90.

- * Backpack travellers, on average spent \$23.18 per visitor night on local transport and tours compared with \$14.80 per visitor night spent by "holiday" visitors. Backpack travellers, on average spent \$10.74 per visitor night on accommodation, whereas "holiday" visitors using commercial accommodation in Queensland spent an average of \$22.30 per visitor night on accommodation.

As a proportion of the Backpack travellers' average expenditure per visitor night, more money was spent on local transport/tours and food and beverages than accommodation, whereas "holiday" visitors as a proportion of their average expenditure per visitor night, spent more money on accommodation, food and beverages and pleasure shopping than on local transport and tours.

- * Backpack travellers spent 33.6 percent of their average expenditure per visitor night on local transport and tours, 27.7 percent on food and beverages and 15.6 percent of their average expenditure per visitor night was spent on accommodation. "Holiday" visitors using commercial accommodation in Queensland spent 18.5 percent of their average expenditure per visitor night on local transport and tours, 25.0 percent on food and beverages and 27.9 percent of their average expenditure per visitor night was spent on accommodation.

These results are consistent with the findings from the study by Pearce (1990) and the Northern Territory Backpacker Survey (1990) with respect to the priority of spending by Backpack travellers.

4.3 Selected Socio-Demographic Characteristics of Backpack Travellers

To measure and compare the differences of selected socio-demographic characteristics of Backpack travellers with the "holiday" visitor using commercial accommodation in Queensland during the 1989/90 financial year, the percentage distribution for the length of stay, age and occupational characteristics were analysed.

Length of Stay Distribution for Backpack Travellers Compared with "Holiday" Visitors

Table 4.3(a) shows the estimated length of stay distribution for Backpack travellers visiting the major Backpacker regions of Queensland compared with MSRP "holiday" visitors using commercial accommodation in Queensland during 1989/90.

Table 4.3(a): Length of Stay by Backpack Travellers Compared With Total MSRP "Holiday" Visitors in Queensland - 1989/90.

REGION/ Market Sector	----- LENGTH OF STAY -----						Average
	1 Night	2 Nights	3-7 Nights	8-14 Nights	15-21 Nights	22+ Nights	
BRISBANE REGION							
Backpacker Visitors	29.6%	29.5%	30.0%	4.3%	2.4%	4.3%	5.0 Nights
MSRP "Holiday" Visitors	39.9%	27.9%	26.9%	3.9%	.7%	.9%	3.2 Nights

MACKAY/PROSERPINE							
Backpacker Visitors	5.6%	20.9%	51.3%	17.6%	2.7%	1.9%	6.0 Nights
MSRP "Holiday" Visitors	34.8%	19.0%	36.1%	8.5%	1.1%	.4%	3.6 Nights

TOWNSVILLE/BOWEN							
Backpacker Visitors	13.6%	22.1%	52.1%	9.1%	1.5%	1.7%	5.0 Nights
MSRP "Holiday" Visitors	35.3%	25.3%	33.3%	4.7%	.6%	.9%	3.2 Nights

CAIRNS/TABLELANDS							
Backpacker Visitors	5.4%	7.9%	47.6%	24.7%	7.1%	7.3%	9.7 Nights
MSRP "Holiday" Visitors	13.3%	15.4%	50.1%	16.5%	2.6%	2.1%	5.8 Nights

TOTAL QUEENSLAND							
Backpacker Visitors	10.8%	9.7%	30.3%	22.8%	10.6%	15.9%	13.0 Nights
MSRP "Holiday" Visitors	26.5%	19.6%	34.4%	13.9%	3.2%	2.4%	5.4 Nights

- * The average number of nights spent in Queensland by Backpack travellers was 13.0 nights compared with an average of 5.4 nights spent in Queensland by all "holiday" visitors using commercial accommodation during 1989/90.

The percentage of Backpack travellers staying more than seven nights in Queensland was greater than for all "holiday" visitors using commercial accommodation in Queensland during 1989/90.

- * Backpack travellers staying more than seven nights in Queensland represented 49.3 percent of all Backpack travellers, whereas 19.5 percent of all "holiday" visitors stayed longer than seven nights.

The Cairns/Tablelands region of Queensland recorded a longer length of stay than for any other major Backpacker region in Queensland.

- * Backpack travellers visiting the Cairns/Tablelands region and staying more than seven nights represented 39.1 percent of Backpack travellers to this region compared with 21.2 percent of "holiday" visitors to the Cairns/Tablelands region staying longer than seven nights.

These findings generally support previous studies on Backpack travel which suggest that Backpack travellers stay longer than other types of tourists.

Age of Backpack Travellers compared with "Holiday" Visitors

Table 4.3(b) shows the estimated distribution of age groups for Backpack travellers in Queensland compared with MSRP "holiday" visitors using commercial accommodation in Queensland during 1989/90.

Table 4.3(b): Age of Backpack Travellers Compared With Total MSRP "Holiday" Visitors in Queensland - 1989/90.

REGION/ Market Sector	----- AGE GROUP -----							
	<14 years	14-17 years	18-19 years	20-24 years	25-34 years	35-44 years	45-59 years	60+ years
TOTAL QUEENSLAND								
Backpacker Visitors	5.1%	.9%	6.5%	35.7%	36.1%	7.3%	4.3%	4.1%
MSRP "Holiday" Visitors	18.4%	4.7%	2.9%	10.1%	20.2%	16.4%	14.6%	12.7%

- * Of all Backpack travellers in Queensland, 78.3 percent were between the ages of 18 and 34, whereas for all "holiday" visitors using commercial accommodation in Queensland 33.2 percent were between the ages of 18 and 34.

These results support the studies by Riley (1988), the Cairns Backpackers Accommodation Association (1988), Hawley (1989) and the Northern Territory Backpackers Survey (1990) which show the predominant age group of Backpack travellers between 20 and 40 years of age, although the study by Pearce (1990) suggests a much greater proportion of Backpack travellers are less than 30 years of age.

- * Backpack travellers over 34 years of age represented 15.7 percent of all Backpack travellers in Queensland, whereas 43.7 percent of all "holiday" visitors were over 34 years of age.

- * Backpack travellers under the age of 18 represented 6.0 percent of all Backpack travellers in Queensland, whereas 23.1 percent of all "holiday" visitors were under the age of 18.

Occupation of Backpack Travellers Compared with All Visitors

Table 4.3(c) shows the estimated distribution of occupational status for Backpack travellers in Queensland compared with all MSRP visitors (including "Business" travellers) using commercial accommodation in Queensland during 1989/90. The categories for occupation include - professional, technical/trade, clerical/sales, self employed, manager/executive, semi/unskilled, home duties, retired/not employed and student.

Table 4.3(c): Occupation of Backpack Travellers Compared With Total MSRP Visitors in Queensland - 1989/90.

REGION/ Market Sector	----- OCCUPATION -----									
	PROF.	TECH TRADE	CLER SALES	SELF EMPL.	MNGR EXEC	SEMI UNSKIL	HOME DUTY	UNEMPL RETIRE	STUD.	
TOTAL QUEENSLAND										
Backpack Travellers	26.8%	15.2%	15.4%	5.3%	9.1%	6.4%	.8%	9.8%	11.2%	
MSRP Visitors	17.8%	17.4%	10.2%	13.1%	9.7%	3.9%	2.0%	22.1%	3.9%	

LEGEND:

PROF. = Professional

TECH/TRADE = Technical & Trades Person

CLER/SALES = Clerical & Sales Person

SELF EMPL. = Self Employed

MNGR/EXEC = Manager & Executives

SEMI/UNSKIL = Semi-skilled & Unskilled Persons

HOME DUTY = Home & House Duties

UNEMPL/RETIRE = Unemployed & Retired Persons

STUD. = Students

Backpack travellers represented a greater proportion of students and professionals than for all visitors using commercial accommodation in Queensland during 1989/90.

- * The occupational category of "Professional" represented 26.8 percent of all Backpack travellers compared with 17.8 percent for all visitors using commercial accommodation. "Students" represented 11.2 percent of Backpack travellers in Queensland, whereas "students" accounted for 3.9 percent of all visitors using commercial accommodation.

These results support the Northern Territory Backpacker Survey (1990) in terms of the distribution of occupations for Backpack travellers and the suggestion by Hawley (1988) and Riley (1988) that Backpack travellers are recent college graduates that have completed a degree or course.

4.4 Transport Characteristics of Backpack Travellers

The transport characteristics of Backpack travellers in Queensland during 1989/90 refer specifically to the main mode of transport used and is compared with the transport used by MSRP "holiday" visitors using commercial accommodation in Queensland.

The MSRP survey examines three different transport patterns for the movement of visitors around Queensland. The first transport pattern is the main type of transport

used on entry into Queensland. This component of the survey excludes Queensland residents. The second transport pattern is the type of transport used to travel to a particular region of Queensland and the third transport pattern is the type of transport used to travel within that region.

Transport Used To Enter Queensland by Backpack Travellers Compared with "Holiday" Visitors

Table 4.4(a) shows the estimated distribution for the main modes of transport used by Backpack travellers to enter Queensland compared with the transport used by MSRP "holiday" visitors using commercial accommodation in Queensland during 1989/90.

Table 4.4(a): Transport Used to Enter Queensland by Backpack Travellers Compared With MSRP "Holiday" Visitors in Queensland - 1989/90.

REGION/ Market Sector	Inter-		Rail	Bus/ Private Rental		Other	
	national air	Domestic air		Coach	Vehicle		
TOTAL QUEENSLAND							
Backpacker Visitors	18.2%	7.7%	2.9%	38.1%	29.2%	2.8%	1.1%
MSRP "Holiday" Visitors	14.3%	20.9%	1.1%	8.6%	50.7%	4.2%	.2%

The main type of transport used by Backpack travellers to enter Queensland was "bus/coach", whereas "private vehicle" was the main type of transport used by "holiday" visitors using commercial accommodation in Queensland during 1989/90.

- * Backpack travellers using bus/coach as transport to enter Queensland represented 38.1 percent of all Backpack travellers compared with 8.6 percent of "holiday" visitors using bus/coach to enter Queensland. Private vehicles were used by 29.2 percent of all Backpack travellers to enter Queensland compared with 50.7 percent of all "holiday" visitors using private vehicles as their main type of transport to enter Queensland.

These results support the Northern Territory Backpacker Survey (1990) in terms of the choice of each transport type used by the Backpack traveller.

Transport Used to Enter Queensland Regions by Backpack Travellers Compared with "Holiday" Visitors

Table 4.4(b) shows the estimated distribution for the main modes of transport used by Backpack travellers to visit the major Backpacker regions of Queensland compared with MSRP "holiday" visitors using commercial accommodation in Queensland during 1989/90.

Table 4.4(b): Transport to Major Queensland Backpacker Regions Used by Backpack Travellers Compared With MSRP "Holiday" Visitors - 1989/90.

REGION/ Market Sector	Air	Rail	Bus/ Coach	Private Vehicle	Rental Vehicle	Other
BRISBANE REGION						
Backpacker Visitors	12.3%	4.2%	53.4%	22.6%	5.9%	1.7%
MSRP "Holiday" Visitors	17.6%	3.4%	12.0%	59.1%	7.0%	1.0%

MACKAY/PROSERPINE						
Backpacker Visitors	12.2%	.9%	66.7%	16.8%	1.4%	2.1%
MSRP "Holiday" Visitors	14.2%	1.0%	14.9%	62.1%	7.2%	.6%

TOWNSVILLE/BOWEN						
Backpacker Visitors	9.0%	2.3%	64.7%	20.9%	1.9%	1.4%
MSRP "Holiday" Visitors	6.3%	1.5%	18.4%	66.2%	7.3%	.3%

CAIRNS/TABLELANDS						
Backpacker Visitors	20.0%	4.3%	54.7%	14.8%	5.4%	.9%
MSRP "Holiday" Visitors	38.7%	2.4%	11.7%	34.7%	11.8%	.8%

For all major Backpacker regions of Queensland, "bus/coach" was the most predominant type of transport used to enter each region, whereas "private vehicle" was the most used transport type for "holiday" visitors, with the exception of the Cairns/Tablelands region, where "air" transport was used more frequently by "holiday" visitors using commercial accommodation in Queensland during 1989/90.

* Backpack travellers using air transport to enter the Cairns/Tablelands region represented 20.0 percent of all Backpack travellers in this region compared with

38.7 percent of "holiday" visitors using air transport to enter the Cairns/Tablelands region.

These results support the suggestion by Hawley (1989) that "hitch-hiking" is no longer an important means of transport between destinations and the use of "bus/coach" by Backpack travellers support the findings in studies by the Cairns Backpackers Accommodation Association (1988) and the Northern Territory Backpackers Survey (1990).

Transport Used Within Queensland Regions by Backpack Travellers Compared with "Holiday" Visitors

Table 4.4(c) shows the estimated distribution for the main modes of transport used by Backpack travellers within the main Backpacker regions of Queensland compared with MSRP "holiday" visitors using commercial accommodation in Queensland during 1989/90.

Table 4.4(c): Transport Within Major Backpacker Regions Used by Backpack Travellers Compared With MSRP "Holiday" Visitors - 1989/90.

REGION/ Market Sector	Public T/port	Private Vehicle	Rental Vehicle	Other
BRISBANE REGION				
Backpacker Visitors	34.8%	27.7%	7.3%	30.2%
MSRP "Holiday" Visitors	23.8%	58.1%	10.7%	7.5%

MACKAY/PROSERPINE				
Backpacker Visitors	40.5%	18.6%	2.9%	38.0%
MSRP "Holiday" Visitors	8.1%	67.9%	13.9%	10.0%

TOWNSVILLE/BOWEN				
Backpacker Visitors	37.3%	20.7%	3.3%	38.8%
MSRP "Holiday" Visitors	14.8%	69.6%	8.3%	7.3%

CAIRNS/TABLELANDS				
Backpacker Visitors	39.5%	15.4%	7.4%	37.8%
MSRP "Holiday" Visitors	16.6%	29.2%	17.7%	36.5%

For all the major Backpacker regions of Queensland, the use of "public transport" was used more frequently by Backpack travellers than for "holiday" visitors. "Holiday" visitors used private vehicles more often than any other form of transport to travel within the selected regions of Queensland, with the exception of the Cairns/Tablelands region.

"Other" forms of transport used to travel within the major Backpacker regions of Queensland were used more predominantly by Backpack travellers than by "holiday" visitors, with the exception of the Cairns/Tablelands region. "Other" transport types

were not further categorised in this survey, but include such transport as private bus/tours, boat/ferry, walking and bicycle.

4.5 Other Characteristics of Backpack Travellers

In addition to the characteristics previously identified by comparing the Backpacker market with the "holiday" market, other characteristics of Backpack travellers in Queensland were analysed from the Backpacker component of the MSRP survey in order to answer other research questions raised in Chapter 1.2.

Backpack Travellers' Country of Origin

Table 4.5(a) shows the estimated number and market share for Backpacker nights spent in Queensland by country of origin during 1989/90.

**Table 4.5(a): Backpacker Nights in Queensland by Country of Origin
- 1989/90.**

COUNTRY OF ORIGIN	Market Share of B/packer Nights in Region	BACKPACKER NIGHTS
AUSTRALIA	30.4%	460,757
NEW ZEALAND	3.9%	59,627
JAPAN/S.E. ASIA	4.1%	62,573
U.S.A./CANADA	9.2%	139,301
UNITED KINGDOM	29.6%	448,951
GERMANY	5.6%	85,308
OTHER EUROPE	14.8%	224,906
OTHER	2.2%	33,974
TOTAL	100.0%	1,515,397

Domestic Backpack travellers represented less than one third of all Backpacker nights spent in Queensland. The overseas country generating the most number of nights spent by Backpack travellers in Queensland was Backpack travellers originating from the United Kingdom.

* Australian Backpack travellers represented 30.4 percent of all Backpacker nights spent in Queensland. Backpack travellers from the United Kingdom represented 29.6 percent of all Backpacker nights, German Backpack travellers represented 5.6 percent and the rest of Europe including the Scandinavian countries represented 14.8 percent of all Backpacker nights spent in Queensland.

These results generally support the Northern Territory Backpacker Survey (1990), although Backpack travellers in Queensland have a larger domestic component than for the Northern Territory. The study by Pearce (1990) reflected similar results to this study with the largest percentage of Backpack travellers coming from the United Kingdom. Backpack travellers originating from the Scandinavian countries were not included as a separate category in the MSRP questionnaire, however, secondary sources of data suggest a high proportion of European Backpack travellers come from Scandinavian countries.

Distribution of Male and Female Backpack Travellers

Table 4.5(b) shows the estimated distribution for male and female Backpack travellers in the major Backpacker regions of Queensland during 1989/90.

Table 4.5(b): Distribution of Male and Female Backpack Travellers in Queensland - 1989/90.

REGION	MALES	FEMALES
BRISBANE REGION		
Backpacker Visitors	63.9%	36.1%

MACKAY/PROSERPINE		
Backpacker Visitors	54.0%	46.0%

TOWNSVILLE/BOWEN		
Backpacker Visitors	56.9%	43.1%

CAIRNS/TABLELANDS		
Backpacker Visitors	49.1%	50.9%

TOTAL QUEENSLAND		
Backpacker Visitors	53.2%	46.8%

Overall in Queensland there were slightly more male Backpack travellers than female Backpack travellers during 1989/90. The Cairns/Tablelands region was represented by an equal number of male and female Backpack travellers, whereas the Brisbane region recorded a dominance of male Backpack travellers.

* For all Backpack travellers in Queensland 53.2 percent were male and 46.8 percent were female. The percentage of male Backpack travellers to the Brisbane region was 63.9 percent.

These results reflect similar findings to the Northern Territory Backpacker Survey (1990) for the sex distribution of Backpack travellers.

Entry Point into Australia for Overseas Backpack Travellers

Table 4.5(c) shows the estimated distribution for the city of entry into Australia by international Backpack travellers staying in Queensland during 1989/90.

Table 4.5(c): Entry Point Into Australia by Country of Origin For Backpack Travellers in Queensland - 1989/90.

OVERSEAS COUNTRY OF ORIGIN	---- ENTRY POINT INTO AUSTRALIA (%) ----								TOTAL
	Bne	Cns	Tsv	Syd	Mel	Per	Dwn	Other	
NEW ZEALAND	68.6%	3.1%	.0%	19.7%	6.5%	.0%	.0%	2.0%	100.0%
JAPAN/S.E. ASIA	14.9%	44.3%	1.7%	32.7%	1.0%	2.2%	3.2%	.0%	100.0%
U.S.A./CANADA	9.9%	19.3%	.0%	58.2%	8.2%	.8%	3.6%	.0%	100.0%
UNITED KINGDOM	5.3%	4.4%	.2%	59.7%	10.9%	13.5%	5.2%	.8%	100.0%
GERMANY	7.4%	3.9%	.0%	60.0%	16.2%	9.4%	2.3%	.9%	100.0%
OTHER EUROPE	19.9%	4.6%	.6%	54.7%	7.2%	6.6%	6.1%	.2%	100.0%
OTHER	3.9%	7.1%	.0%	11.6%	73.4%	1.1%	3.0%	.0%	100.0%
TOTAL	14.2%	9.9%	.3%	49.7%	14.1%	7.1%	4.2%	.5%	100.0%

LEGEND:

Bne = Brisbane

Mel = Melbourne

Cns = Cairns

Per = Perth

Tsv = Townsville

Dwn = Darwin

Syd = Sydney

The entry point into Australia for international Backpack travellers is aligned with the seven international airports in Australia. Overall, the most popular entry point into Australia for overseas Backpack travellers was via Sydney. Queensland, with three international airports, was the second most frequently used entry point into Australia and the most frequently used entry point into Australia for Backpack travellers from New Zealand and the Japan/South East Asia regions for Backpack travellers to Queensland.

- * Sydney as an entry point into Australia was used by 49.7 percent of all international Backpack travellers in Queensland. The entry points of Brisbane, Cairns and Townsville recorded 24.4 percent of all international Backpack travellers to Queensland.

4.6 Supplementary Survey

The supplementary Backpacker questionnaire administered during the June quarter of 1990 was aimed at gathering additional information on Backpack travellers in order to support the main MSRP Backpacker survey. The administration and analysis of this survey used the same methodology as that of the Backpacker component of the MSRP survey described in Chapter 3.0, however because this supplementary survey was conducted only during the June quarter, the following results may not be representative of the full 1989/90 financial year.

The supplementary survey conducted during the June quarter 1990 was administered to over 1,000 Backpack travellers and provided information on the following characteristics of Backpack travellers:

- a. other States and countries visited whilst on this trip
- b. the attractions, features and activities considered the most interesting whilst staying in a particular Backpacker region
- c. the main source of information used to find out about Backpacker accommodation
- d. and the level of satisfaction with Backpacker accommodation in Queensland.

The results from the Supplementary survey are interpreted for the June quarter 1990 only, and provide additional information specifically on Backpack travel in Queensland.

Other States and Territories Visited by Backpack Travellers

Table 4.6(a) shows the estimated distribution for Backpack travellers in Queensland who visited or intended to visit the other States and Territories of Australia as part of their current trip away from home during the June quarter 1990.

Table 4.6(a): Other States/Territories Visited by Backpack Travellers in Queensland - June Quarter 1990.

REGION	OTHER STATES VISITED						TAS
	NSW	VIC	SA	WA	NT	ACT	
TOTAL QUEENSLAND							
Backpacker Visitors	84.9%	50.6%	38.7%	19.8%	45.1%	26.9%	9.2%

Over half of the Backpack travellers in Queensland visited or intended to visit New South Wales and Victoria during the June quarter 1990. The Northern Territory was the next most popular State or Territory to be visited or intended to be visited by Backpack travellers in Queensland. It should be noted that a Backpack traveller may visit more than one other State or Territory whilst on the same trip and the intention to visit a particular State or Territory may not come to fruition.

- * Backpack travellers who visited or intended to visit New South Wales represented 84.9 percent of all Backpack travellers in Queensland. Backpack travellers visiting or intending to visit Victoria represented 50.6 percent of all Backpack travellers in Queensland during the June quarter of 1990.

The Northern Territory Backpacker Survey (1990) also revealed a high proportion of Backpack travellers visiting other States and Territories in Australia.

Other Countries Visited by Backpack Travellers in Queensland

Table 4.6(b) shows the estimated distribution for Backpack travellers in Queensland who visited or intended to visit other countries as part of their current trip away from home during the June quarter 1990.

Table 4.6(b): Other Countries Visited by Backpack Travellers in Queensland - June Quarter 1990.

REGION	----- OTHER COUNTRIES VISITED -----						
	NEW ZEALAND	PACIFIC ISLANDS	S.E. ASIA	OTHER ASIA	EUROPE	NORTH AMERICA	OTHER
TOTAL QUEENSLAND Backpacker Visitors	32.1%	15.4%	28.2%	36.7%	15.7%	23.5%	6.4%

A high proportion of Backpack travellers to Queensland have visited or intend to visit Asian countries as part of their current trip. Almost one third of Backpack travellers in Queensland have visited or intend to visit New Zealand and almost one quarter of Backpack travellers have visited or intend to visit North America. It should be noted that a Backpack traveller may visit more than one country whilst on the same trip and the intention to visit a particular country may not come to fruition.

- * Of all Backpack travellers in Queensland, 28.2 percent visited or intended to visit South East Asia and 36.7 percent visited or intended to visit other Asian countries. Backpack travellers visiting or intending to visit New Zealand represented 32.1 percent and 15.4 percent of Backpack travellers said they had visited or intended to visit a Pacific island whilst on their current trip.

These results support the suggestion by Riley (1988) and Hawley (1988) that Backpack travellers visit Australia as part of an extended trip away from their usual country of residence.

Attraction to Backpacker regions of Queensland

Table 4.6(c) shows the estimated distribution for the three most interesting attractions, activities and/or features preferred by Backpack travellers within the major Backpacker region they visited during the June quarter 1990. The categories include; climate, lifestyle/culture, diving/water sports, scenic tours/cruises, Beach/Island visits, Bushwalks/nature based activities, nightlife/entertainment and other.

It should be noted that the categories included for attractions, activities and/or features from the questionnaire are not exclusive and one particular attraction, activity and/or feature may include elements from another category. For example, the influence of "climate" may also be a contributing factor for "beach and island visits" or "diving and water sport" activities.

Table 4.6(c): Attraction to Backpacker Regions in Queensland - June Quarter 1990.

REGION	----- ATTRACTION TO REGION -----							
	Climate	Lifestyle culture	Diving w/sport	Tours & cruises	Beach Islands	Nature O/door	Nightlife	Other
BRISBANE REGION								
Backpack Travellers	21.2%	18.5%	2.3%	10.8%	7.8%	.8%	5.0%	33.7%
MACKAY/PROSERPINE								
Backpack Travellers	22.1%	.5%	17.6%	23.2%	19.7%	4.3%	3.1%	9.5%
TOWNSVILLE/BOWEN								
Backpack Travellers	12.6%	.7%	13.6%	18.8%	34.3%	7.0%	.4%	12.6%
CAIRNS/TABLELANDS								
Backpack Travellers	11.0%	1.6%	26.4%	27.4%	15.4%	9.7%	5.5%	3.1%
TOTAL QUEENSLAND								
Backpack Travellers	12.5%	3.6%	16.8%	18.8%	22.2%	12.1%	3.2%	10.8%

LEGEND:

Diving w/sport = Diving & Water Sports

Beach Islands = Beach & Island Visits

Nature O/doors = Nature & Outdoor activities

Nightlife = Nightlife & Entertainment

For all Backpack travellers in Queensland, the three attractions, activities and/or features considered the most interesting were "beach and island visits", "scenic tours and cruises" and "diving and water sports". This trend was reflected for each of the major Backpacker regions of Queensland with the exception of the Brisbane region where "climate", "lifestyle and culture" and "other" attractions, activities and /or features were considered more interesting. The category of "other" also includes - "shopping", "theme parks" and "other sports".

- * For all Backpack travellers in Queensland, 22.2 percent considered "beach and island visits" the most interesting attraction, 18.8 percent considered "scenic tours" to be the most interesting and 16.8 percent of all Backpack travellers in Queensland considered "diving and water sports" the most interesting activity for the regions visited in Queensland during the June quarter of 1990.

Information Source on Backpacker Accommodation

Table 4.6(d) shows the estimated distribution for the main source of information used to find out about Backpacker accommodation in Queensland during the June quarter 1990.

Table 4.6(d): Information Source on Backpacker Accommodation in Queensland - June Quarter 1990.

REGION	----- INFORMATION SOURCE -----					
	BACKPACKER MAGAZINE	OTHER BOOK MAGAZINE	YOUTH HOSTEL	WORD OF MOUTH	TRAVEL BROCHURE	OTHER
TOTAL QUEENSLAND Backpack Travellers	31.8%	8.0%	6.5%	38.4%	8.0%	7.3%

"Word of mouth" was considered the main source for gaining information on Backpacker accommodation in Queensland. The use of "Backpacker books and magazines" was also a significant source of information on Backpacker accommodation in Queensland.

- * "Word of mouth" as the main source of information on Backpacker accommodation represented 38.4 percent of all Backpack travellers. The use of "Backpacker books and magazines" as a main source of information on Backpacker accommodation represented 31.8 percent of all Backpack travellers in Queensland during the June quarter of 1990.

These results support the findings of the Northern Territory Backpacker Survey (1990) which reflected a similar high proportion of Backpack travellers relying on "word of mouth" and Backpacker magazines and books. The suggestion by Hawley (1988) that Backpack travellers swap information on where to stay, what to do and what to avoid is also supported by these results.

Level of Satisfaction with Backpacker Accommodation

Table 4.6(e) shows the estimated distribution for the level of satisfaction with Backpacker accommodation in Queensland during the June quarter 1990.

Table 4.6(e): Level of Satisfaction With Backpacker Accommodation in Queensland - June Quarter 1990.

REGION	----- LEVEL OF SATISFACTION -----				
	EXCELLENT	GOOD	JUST ACCEPTABLE	UNSATISFACTORY	VERY UNSATISFACTORY
TOTAL QUEENSLAND					
Backpacker Visitors	14.8%	72.7%	12.5%	.0%	.0%

The majority of Backpack travellers rated their level of satisfaction with Backpacker accommodation in Queensland as "good" or "excellent". There were no Backpack travellers during the June quarter 1990, that were unsatisfied with Backpacker accommodation in Queensland.

- * For all Backpack travellers in Queensland 72.7 percent recorded their level of satisfaction with Backpacker accommodation in Queensland as "good" and 14.8 percent rated Backpacker accommodation in Queensland as "excellent".

These results help to support the suggestion by Riley (1988) and Hawley (1989) that Backpacker accommodation operators are meeting the needs of this type of traveller by providing basic facilities and social contact for a market of Backpack travellers pursuing similar goals.

CHAPTER 5.0 SUMMARY

The aim of this final Chapter is to summarise the research on Backpack travel in Queensland and to outline some of the implications this research may have for the tourism industry in Queensland.

With only a limited amount of literature on Backpack travel and a sudden growth in the development of Backpacker accommodation in Queensland, there was a need created to investigate this market further. As an analysis of Backpack travellers in Queensland, this study was aimed at identifying the major characteristics for this type of traveller, so that comparisons with other tourism markets could be established in order to determine the impact and potential of the Backpacker market in Queensland. This study therefore, substantiated the size of the Backpacker market and compared some of the characteristics of this market with existing tourism data on the "holiday" visitor, in order that the tourism industry may better understand this type of traveller.

The information and research data contained in this report was designed to enable governments, planners, developers and tourism operators to make informed decisions based on applied research techniques in order to develop a market that may require a different approach from that which is currently being used in the tourism industry.

The terms "Backpack" traveller and "Backpacker" have become generic words to describe people who are seeking a particular type of travel experience. To maintain

consistency with the Queensland Tourist and Travel Corporation's definition of a tourist, this study used an operational definition of Backpack travellers as....

"domestic and international visitors using commercial Backpacker accommodation in Queensland, who were more than forty kilometres away from their usual place of residence and staying in a tourism region of Queensland for at least one night but no more than ninety consecutive nights within the same region".

Although this definition may exclude some Backpack travellers, this definition was measurable and consistent with the research methodology used for existing tourism research on other "holiday" visitors to Queensland.

As the Backpacker market has developed in Australia, the tourism industry has become increasingly aware of its existence - particularly as a contributor to international tourism in Australia. Previous studies on Backpack travel in Australia have helped to identify the major characteristics of this market segment and have therefore provided the catalyst for substantiating the size and characteristics of Backpack travellers in Queensland.

The main objective of this research was to compare the size, expenditure, transport and selected socio-demographic characteristics of Backpack travellers in Queensland with the total Queensland "holiday" market. A secondary objective was to provide additional information that would be useful for planners, developers and operators involved with Backpack travellers.

5.1 Summary of Research Findings

This study on Backpack travel in Queensland used the resources of the Queensland Tourist and Travel Corporation's Major Survey Research Programme (MSRP), to gather and analyse information on Backpack travel during the 1989/90 financial year.

The Backpacker component of the MSRP used an "enroute" survey, whereby the total number of Backpacker beds in all Queensland Backpacker accommodation establishments were used to identify a representative sample. By using this research technique it was possible to compare the Backpacker market in Queensland with the existing MSRP data produced for all "holiday" visitors using commercial accommodation in Queensland.

The major Backpacker regions in Queensland were identified by the number of Backpacker beds within each region and included the regions of Brisbane, Mackay/Proserpine, Townsville/Bowen and Cairns/Tablelands.

The results from the surveyed sample undertaken during the 1989/90 financial year were "weighted" to produce estimates for the total number of Backpack travellers in Queensland. These final estimates were compared with existing data on all "holiday" visitors using commercial accommodation in Queensland, in order to measure the impact of the size, expenditure, transport and selected socio-demographic characteristics of Backpack travellers.

Table 5.1(a) shows a summary of the major research findings for Backpack travellers compared with "holiday" visitors using commercial accommodation in Queensland during 1989/90.

Table 5.1(a): Summary of Major Research Findings

REGION	BACKPACKER MARKET	MARKET SHARE of MSRP	MSRP "HOLIDAY" MARKET		
BRISBANE	Backpacker Nights	198,280	10.6%	"Holiday" Nights	1,867,700
	Backpack Travellers	52,270	8.5%	"Holiday" Visitors	615,400
	Backpacker Expenditure ..	\$12,793,805	6.5%	"Holiday" Expenditure ...	\$198,346,670
	Avg Expend. per Night ...	\$67.82	n/a	Avg Expend. per Night ...	\$105.40
	Average Length of Stay ..	5.0 nights	n/a	Average Length of Stay ..	3.2 nights
MACKAY/ PROSERPINE	Backpacker Nights	175,937	9.7%	"Holiday" Nights	1,812,300
	Backpack Travellers	32,703	7.0%	"Holiday" Visitors	467,000
	Backpacker Expenditure ..	\$18,876,756	9.2%	"Holiday" Expenditure ...	\$204,173,690
	Avg Expend. per Night ...	\$112.61	n/a	Avg Expend. per Night ...	\$113.50
	Average Length of Stay ..	6.0 nights	n/a	Average Length of Stay ..	3.6 nights
TOWNSVILLE/ BOWEN	Backpacker Nights	185,221	13.6%	"Holiday" Nights	1,361,300
	Backpack Travellers	41,232	10.5%	"Holiday" Visitors	393,800
	Backpacker Expenditure ..	\$6,879,175	7.4%	"Holiday" Expenditure ...	\$93,343,170
	Avg Expend. per Night ...	\$38.41	n/a	Avg Expend. per Night ...	\$68.20
	Average Length of Stay ..	5.0 nights	n/a	Average Length of Stay ..	3.2 nights
CAIRNS/ TABLELANDS	Backpacker Nights	555,895	14.9%	"Holiday" Nights	3,734,800
	Backpack Travellers	75,687	13.0%	"Holiday" Visitors	583,800
	Backpacker Expenditure ..	\$36,161,119	9.9%	"Holiday" Expenditure ...	\$364,333,200
	Avg Expend. per Night ...	\$65.62	n/a	Avg Expend. per Night ...	\$96.90
	Average Length of Stay ..	9.7 nights	n/a	Average Length of Stay ..	5.8 nights
SUBTOTAL REGIONS	Backpacker Nights	1,115,333	12.7%	"Holiday" Nights	8,776,100
	Backpack Travellers	201,892	9.8%	"Holiday" Visitors	2,060,000
	Backpacker Expenditure ..	\$74,710,855	8.7%	"Holiday" Expenditure ...	\$860,196,730
	Avg Expend. per Night ...	n/a	n/a	Avg Expend. per Night ...	n/a
	Average Length of Stay ..	n/a	n/a	Average Length of Stay ..	n/a
TOTAL QUEENSLAND	Backpacker Nights	1,515,396	5.5%	"Holiday" Nights	27,466,600
	Backpack Travellers	167,194	3.7%	"Holiday" Visitors	4,505,100
	Backpacker Expenditure ..	\$104,780,097	4.8%	"Holiday" Expenditure ...	\$2,197,031,530
	Avg Expend. per Night ...	\$68.96	n/a	Avg Expend. per Night ...	\$80.00
	Average Length of Stay ..	13.0 nights	n/a	Average Length of Stay ..	5.4 nights

In addition to the major research findings shown in Table 5.1(a), there were many other important characteristics of Backpack travellers that this study highlighted.

1. Backpack travellers from overseas represented almost 70 percent of all Backpacker nights spent in Queensland during 1989/90.
2. The four major Backpacker regions of Brisbane, Mackay/Proserpine, Townsville/Bowen and Cairns/Tablelands represented almost three quarters of all Backpacker nights spent in Queensland.
3. The expenditure by international Backpack travellers represented over 70 percent of all Backpackers' expenditure in Queensland during 1989/90.
4. Backpack travellers spent almost one third of their average expenditure per visitor night on local transport and tours, over one quarter of their daily expenditure was spent on food and only one sixth of their average daily expenditure was spent on accommodation during 1989/90.
5. Of all Backpack travellers in Queensland, over 75 percent were between the ages of 18 and 34 years.
6. The occupation category of "Professional" represented over one quarter of all Backpack travellers and "Students" represented one tenth of all Backpack travellers visiting Queensland during 1989/90.

7. Sydney as an entry point into Australia, was used by almost half of all the international Backpack travellers visiting Queensland. The entry points of Brisbane, Cairns and Townsville represented one quarter of all international Backpack travellers to Queensland.
8. Backpack travellers use "bus/coach" as a form of travel more extensively than the total "holiday" market with over 38 percent of all Backpack travellers using "bus/coach" as their main form of transport to enter Queensland.

5.2 Implications of Research Findings

Through the identification of the characteristics of Backpack travellers in this study and the comparison of this market with the "holiday" market in Queensland, many of the traits identified by previous studies were substantiated. The implications of these research findings help create a better understanding of the Backpacker market in Queensland.

The implications discussed in this chapter act merely as points worthy of further consideration in order to generate strategies for further developing the Backpacker market in Queensland.

1. This study supports the findings of the Cairns Backpackers Accommodation Association (1988), Hawley (1989), Pearce (1990) and the Northern Territory

Backpacker Survey (1990) which suggested that a high percentage of Backpack travellers were from overseas - particularly from the United Kingdom and Europe. Therefore there are proportionately more benefits to Australia and Queensland from the high international component of Backpack travellers to Queensland than from the "holiday" market which reflected a large component of domestic visitors.

2. The average daily expenditure by Backpack travellers was not considerably less than for the total "holiday" market in Queensland, however the distribution pattern of their expenditure was somewhat different from the "holiday" market, therefore the Backpack travellers' contribution to the different segments of the tourism industry will also vary accordingly.
3. Expenditure by international Backpack travellers is directly contributing to Australia's balance of trade as foreign revenue. With the highest proportion of the Backpack travellers' average daily expenditure spent on local transport (including tours), food and beverages it can be implied that much of the revenue generated by Backpack travellers in Queensland remains within the local economies of Queensland.
4. Backpack travellers tended to have a longer duration of stay in Queensland than most "holiday" visitors and Backpack travellers also visited more regions of Queensland as part of the one trip, therefore distributing their wealth more widely throughout the Queensland economy.

5. The age of Backpack travellers was predominantly concentrated between 18 and 34 years and consisted of a high percentage of people with "professional" occupations and/or "students" when compared with the total "holiday" market in Queensland which may imply a higher propensity to travel in the future.
6. The predominant type of transport used by Backpack travellers was by bus and/or coach which provides a greater degree of flexibility in the Backpack travellers' itinerary and incorporates more frequent "stop overs" whilst travelling.
7. The high proportion of Backpack travellers visiting or intending to visit other States and/or Territories of Australia indicated that Queensland was only a part of their trip in Australia. Similarly, a high proportion of Backpack travellers visited or intended to visit other countries in close proximity to Australia including New Zealand and Asia, which implies that their trip to Australia was only part of an extended trip away from their usual place of residence.
8. The attractions and activities of interest to Backpack travellers visiting the regions of Queensland were predominantly related to the unique natural attractions of Queensland and incorporated activities closely associated with these attractions such as water and beach related activities.
9. The main source of information on Backpacker accommodation was through "word of mouth", which implies that Backpack travellers learn about which

places to stay at based on the recommendations of travellers before them through a communication network developed by travellers on route.

5.3 Conclusion

The Backpacker market, as a relatively new and dynamic sector of Queensland's tourism industry, offers many innovative opportunities both for the traveller and for the tourism operator. This market segment lends itself to unique marketing initiatives specifically designed to encourage a unique form of traveller.

This study revealed that Backpack travellers are a well defined market compared with the total "holiday" market in Queensland, which can easily be identified in general terms. That is, Backpack travellers are predominantly aged between 18 and 35 years, the majority are students and "white collar" workers, originating largely from the United Kingdom, Europe and North America. Primary and secondary data sources also suggest this market travels widely and for extended periods of time and use the Backpacker "network" for information on travel. Any strategy to target the Backpack traveller must acknowledge the characteristics identified by this analysis of Backpack travel in Queensland.

The opportunity to develop, promote and expand the Backpacker market in Queensland has become widely acknowledged by tourism industry bodies, developers and operators looking to expand into new markets. The attractiveness of the

Backpacker market as a unique style of travel and with an identifiable target market lends itself to new opportunities for tourism in Queensland. However without some form of long term strategy to regulate and control the exploitation of this market, the appeal of Backpack travel may be lost to the "mass" market and result in an environment no longer attractive to this type of traveller.

The need for continually monitoring the Backpacker market in Queensland is evidenced in this study by the Backpack travellers expenditure patterns and support of localised economies. The high propensity for Backpack travellers to return to Queensland as a well educated, high income earning "five star" traveller needs to be further investigated and is paramount to the future value of this easily identified market.

However, if Backpack travel to Queensland is increased at the expense of the experience sought by this type of traveller, the Backpacker market in Queensland will be abandoned by travellers seeking other destinations that will better meet their needs.

Based on the information outlined in this study, the potential value of this market to the growth of tourism in Queensland and the development of a new and important international market, the future opportunities for the Backpacker industry in Queensland is only just being realised.

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APPENDIX 1

Methodology for Total Major Survey Research Programme

1 INTRODUCTION

1.1 Background and Purpose

In April 1982, Cameron McNamara Pty Ltd, was commissioned by the Queensland Tourist and Travel Corporation (QTTTC) to conduct a survey of travellers staying in non-private accommodation in the main tourist regions in Queensland for the twelve month period ending 30 June 1983. The survey has been extended and conducted annually since then and is now conducted by the National Centre for Studies in Travel and Tourism. This report outlines the methodology employed and presents major results of the analyses of the survey responses.

Prior to this survey, termed the "Major Survey Research Programme" (MSRP), the last comprehensive survey of tourism in Queensland was conducted during 1968/69. Despite major restructuring and expansion of the industry in the intervening period almost no substantive research of tourism was undertaken. In more recent years two continuing surveys have been introduced with one, the International Visitor Survey (IVS), dealing with international tourists and the other, Domestic Tourism Monitor (DTM), covering only Australian domiciled tourists. Although these surveys provide much useful information they have restricted application for promotional and marketing purposes, for regional planning, and more generally for pre-investment studies.

The deficiencies in the data are a potential constraint inhibiting further development of the industry in Queensland. Interest in the industry has intensified in recent years as the full potential of Queensland has become more widely recognised. At the same time Government now appreciates the contribution which the industry can make in meeting employment, regional development and broader economic objectives.

To reach its full potential the QTTTC is aware that the industry must be well researched, planned, promoted and managed. This can only occur when adequate data on the industry exist. It was against this background that the QTTTC took the initiative of commissioning this survey to obtain information useful for planning and to ensure that no avoidable constraint is retarding growth.

1.2 The 1989/90 MSRP

The details provided in the following pages refer particularly to the 1989/90 survey. Much of the information provided applies also to the surveys in earlier years, but the reader should note that from 1989/90 regional boundaries have been changed, mainly to correspond to Australian Bureau of Statistics (ABS) Statistical Divisions (SD).

To provide constant time series estimates data for previous years are being reanalysed in terms of these new definitions of Regions.

1.3 Terms of Reference

As defined in the Terms of Reference, the main objectives of the survey programme are

- to obtain information on visitor characteristics on a regional basis. This covers international, interstate and intrastate visitors and includes demographic details as well as trip data;
- to measure tourist expenditure on a regional basis. This covers total trip expenditure as well as details on the actual expenditure patterns;
- to collect information on visitor opinions of various aspects of their Queensland trip;
- to design the programme so that it meets current demands for information and will, as far as possible, anticipate and satisfy future demands.

1.4 Conduct of the Survey

In recent years the National Centre for Studies in Travel and Tourism has been responsible for conduct of the study within a framework defined by the QTTC.

The main tasks undertaken by the Consultants have been-

- study management;
- preparation of the sampling frame;
- design of the questionnaire(s);
- sample design and selection;
- specification of field procedures;
- briefing and instruction of interviewers;
- pilot survey;
- conduct of the main survey including audit of field work;
- editing, coding and punching of the data;
- computer analysis of the survey results; and
- reporting.

The QTTC has been responsible amongst other matters for -

- defining the regional groupings and the geographic area covered by the survey;
- defining the sub-set of the tourist population within the survey scope; and
- the topics and subject areas treated in the survey questionnaire(s).

Quarterly reports have been prepared and close liaison maintained through the survey with officers of the research and Development Division of the QTTC.

2 SURVEY SPECIFICATION

2.1 Coverage

The major part of the MSRP involves a sample survey of tourists staying in commercial accommodation in Queensland at some time during the stated time period.

A Tourist is defined as a person who, for any purpose, is away from his or her usual place of residence for a period of at least one overnight stay and at a location at least forty kilometres from that usual residence. Additionally the definition excludes persons on trips involving a stay of more than ninety nights in the survey region. Coverage of the MSRP is limited to persons staying in commercial accommodation. A separate survey provides estimates relating primarily to visitors staying in private accommodation.

Note that where visitors spend some time in both commercial and private accommodation, estimates for each separate survey are weighted to avoid double counting.

For the purposes of survey design and analyses Queensland is divided into a number of Regions as defined below. Output from the survey includes State estimates as well as separate estimates for each of these Regions.

2.2 Survey Regions

In the main these Regions correspond to ABS Statistical Divisions (SD). These Regions are listed below.

1. Gold Coast; Gold Coast City plus part of Albert west to Nerang and north to Coomera.
2. Brisbane (SD).
3. Sunshine Coast; Caloundra, Maroochy and Noosa Shires.

4. Balance of Moreton; i.e. Moreton SD minus regions 1 and 3.
5. Wide Bay Burnett (SD).
6. Fitzroy (SD); centred on the cities of Rockhampton and Gladstone.
7. Mackay (SD).
8. Northern (SD); centred on Townsville.
9. Far North (SD); centred on Cairns.
10. Darling Downs (SD).
11. Western Queensland; North West, Central West and South West SD's.

Coastal islands are included in the relevant Regions above. However separate tabulations are also produced for the Barrier reef Islands as a destination Region. This Region includes all the coastal islands north from Lady Elliott.

The design of the survey also allows some analyses for smaller areas or sub-regions within certain of the above, including primarily Mackay and the Far North.

2.3 Commercial Accommodation

Commercial Accommodation covers various types of accommodation usually available for short term letting and primarily includes:

- (a) licensed hotels and motels;
- (b) guest houses and hostels;
- (c) units, flats and rented houses; and
- (d) caravan parks.

(b) predominantly comprises establishments where letting is on a per bed rather than per room basis and/or where facilities provided are mostly shared.

(c) includes only units in managed properties or properties handled by letting agents. Motel style units/serviced apartments are included in this category if breakfast is not available for guests on the premises. Otherwise such units are classified as motel units.

(d) covers establishments providing some powered sites for caravans and includes managed camping grounds where fees are charged.

(a), (b) and (d) type establishments, particularly caravan parks, have some room/sites which, from time to time, might be occupied by persons where length of stay puts them outside the earlier definition of a Tourist. Such longer term guests are referred to as Permanents. Note that Occupancy Rates are based on the total number of rooms/sites in these establishments. Thus the Occupancy Rate excluding Permanents is the percentage of total rooms/sites occupied by Tourists. Including Permanents refers to the overall Occupancy rate.

(c) excludes those units, in managed establishments or on agents' books, which are reported as only available for longer term rental. Occupancy Rates are based on the number of units listed as available for short term letting. Note that in practice on occasions some such units are found to be occupied by Permanents as defined above. Hence there is again a need to distinguish between occupancy including and excluding Permanents.

1989/90 is the first full year for which an additional component was added to the survey to cover marine-based accommodation (charter/cruise boats) in the Whitsunday and Cairns areas.

2.4 The Sampling Frame

Selection of the sample of tourists is based on accommodation units (e.g. rooms, sites) as sampling units; tourists are selected as those occupying sampled accommodation units. This approach is similar to that employed in the more familiar household survey.

As well, samples of accommodation units are of direct interest since estimates of occupancy rates are needed to construct estimates of such totals as the population size and total expenditure by tourists. Thus the sampling frame consists of a comprehensive list of rooms, suites, flats, sites, etc., within the defined accommodation types and regions of Queensland and which are normally available to short-term visitors.

The sampling frame for this survey is an update of the frame maintained for the MSRP in previous years. That frame has been constructed using data from a variety of sources including the following:

- Dawsons Accommodation Guides
- RACQ Accommodation and Caravaning Directories
- QTTC Lists
- Lists provided by Local Authorities
- Regional Tourist Associations' brochures, listings, etc.
- Transport operators' and Travel Agents' holiday guides
- Industry Association Directories
- Lists of licensed hotels
- Telephone directories
- High-rise unit construction data
- Internal sources.

In addition, field inspection is employed as necessary to identify multi-unit establishments which, because of their management and/or booking arrangements, might not appear on the above lists.

To complete the frame, real estate agents found to have holiday lettings included in their rent rolls are listed. Annual surveys covering all real estate agents on the Gold and Sunshine Coasts and in the main holiday areas of other regions are undertaken to determine the number of dwellings each holds for short-term rental.

Details about sampled accommodation establishments are obtained as part of the visitor and occupancy surveys. That provides a valuable source of information for regular updating of the sample frame, particularly with respect to establishment size. Quarterly updates are also undertaken via searches of information from the sources previously listed as they become available. While it is certain that the sampling frame so constructed would cover the vast majority of relevant accommodation units, some small "gap" may exist between the population and the frame. In particular some houses or flats which are only rented privately might not be included. In addition, for reasons of cost effectiveness, the surveys of real estate agents are not extended to areas such as Brisbane City where the proportion of real estate agents' lettings for holiday purposes is known to be insignificant.

2.5 Sample Design

For both the survey of visitors (Visitor Survey) and the telephone occupancy survey (Occupancy Survey) the sample frame is stratified according to the regions as defined in 2.2 and then by accommodation type. The accommodation strata employed are

- hotels/motels
- private hotels/guest houses/hostels
- units/flats
- caravan parks
- marine-based accommodation

For the Gold Coast, Brisbane and Cairns regions hotels/motels are further divided into larger (>100 rooms) and smaller establishments. Note that a fuller stratification by size of establishment is achieved via the creation of zones as part of the replicated sampling design referred to below.

For the Gold Coast and the Sunshine Coast regions units/flats are further classified according to whether or not they are let by real estate agents.

Not all the accommodation types listed above occur in significant numbers in each of the regions, and therefore the number of strata within the regions will vary. E.g. no units/flats are included in the sample frame for Western Queensland and Darling Downs. Currently the Whitsunday area and Cairns are the most significant sources of marine-based accommodation for visitors; and it is only for these areas that such accommodation is covered.

For the Visitor Survey a replicated sample design is employed for each of the strata noted above. Two replications are used in each case and zones (i.e. sub groups within the population) are constructed so as to achieve further effective stratification by establishment size and time. The sampling device used within each zone is similar in effect to cluster sampling with p.p.s. selection. Implicitly each zone comprises a number of "clusters" containing an equal anticipated number of accommodation units. From each zone for each replication one such ultimate cluster is selected.

To achieve optimum efficiency these "clusters" are created so as to be as heterogeneous as is practical. As well to minimise administrative difficulties and ensure the most cost effective design the size of clusters is set at what is determined to be a viable 'workload' for an interviewer in the limited set time that can be worked on a sampled day. Note that practical considerations mean that the actual sample size achieved on a selected day can vary from that aimed at. The estimation formulae employed make use appropriate weights to counteract any resultant over or under representation.

The above comments apply specifically to the interviewer-type component of the survey. In more remote areas self-enumeration questionnaires are used. In these cases questionnaires are distributed by management or staff to guests in nominated rooms/units.

For all regions sampling is spread over the full year. Sample selection is determined on a quarterly basis and some adjustment to strata weights is needed from quarter to quarter to allow for adjustments to the sample frame and any modifications to the sample design. Within any quarter the sample design is implicitly self-weighting with respect to time.

The Occupancy Survey comprises a telephone interview survey of sampled accommodation establishments and provides estimates of occupancy rates and room/unit/site nights. For other than caravan parks and units and flats this survey also provides estimates of visitor nights. These data are then, in effect, used as benchmarks for adjusting estimates obtained from the Visitor Survey.

As noted above, for this survey the basic stratification employed is as for the Visitor Survey. Within strata, establishments are selected using p.p.s. selection. Data for all units within sampled establishments and for the sample period are obtained.

2.6 Estimation

The estimation formulae employed comprise a complex combination of components including weights to take account of factors such as non-response, disproportionability in sampling at the various levels of stratification, the effect of the unit of measurement chosen and the relationship between probability of selection and length of stay in establishments within the coverage of the survey. The complexity of estimators is increased by the fact that, for most variables, the estimators are constructed so that responses from visitors to multiple regions can be used in obtaining estimates relating to each of the regions visited, regardless of where the visitors are when sampled. In all cases estimators are constructed so as to ensure the absence of any avoidable statistical bias.

2.7 Field Procedures for the Visitors Survey

In the main questionnaires are administered through face-to-face interviewing. For the Barrier Reef, Western Queensland and most of Brisbane Hinterland interviewers are not used. Self-enumeration questionnaires mailed to managers/proprietors for distribution to sampled (or all) units are used in those cases.

Mail questionnaires are also used for establishments located in areas which, though they are part of a main survey region, are relatively distant from concentrations of tourist accommodation.

At proposed levels of sampling this would refer to approximately 15 percent of sampling units outside south-east Queensland.

For obvious practical reasons the marine-based accommodation component of the survey also requires the use of self-enumeration questionnaires. These are distributed by a member of the crew or other company personnel to all guest groups on the sampled cruise/charter.

2.8 Questionnaires

Three questionnaires are used for the Visitor Survey. QTTC1 and QTTC2 refer to the interviewer and self-enumeration questionnaires respectively. The QTTC2 is an abbreviated version of the QTTC1, but retains coverage of the major variables of interest. Its primary use is in Western Queensland, the Barrier Reef Islands, Brisbane Hinterland and the remoter areas of the main regions. The QTTC is also used where an interviewer is unable otherwise to make contact with the occupants of a sampled room/unit. Note that the content of those questionnaires has changed somewhat over the years of conduct of the MSRP.

A third questionnaire, QTTC3, is used for the marine-based accommodation component. This has the same content as the QTTC2, but some changes to the form of questions takes account of the different context.

2.9 Sample Size

The regional sample sizes achieved are shown in the table below. Note that the allocation of the sample across regions is disproportionate, but consistent with the fact that the study primarily is intended to comprise a set of regional surveys.

Sample Sizes for the Visitor Survey 1989/90

Region	Number of Visitor Questionnaires^(a)
Gold Coast	1,221
Brisbane	1,346
Sunshine Coast	1,337
Wide Bay-Burnett	742
Fitzroy	883
Mackay	1,817
Northern (Townsville)	1,338
Far North (Cairns)	2,446
Darling Downs	329
Balance of Moreton	242
Western Queensland	234
Barrier Reef ^(b)	1,017
All Regions	11,935

(a) Excludes questionnaires from respondents determined not to be tourists as defined in terms of length of stay or residence criteria. Particularly in the case of caravan parks the number of such questionnaires is large.

(b) Included also in the relevant regions above.

Note that with respect to estimates for most variables, other than expenditure, the effective sample size for each Region is greater than the actual number of responses shown on the Table. Inter-regional estimation formulae have been derived, and these allow responses from visitors to multiple regions to be taken into account for estimates for each of the regions visited, regardless of where they are when sampled. Past data indicates that this procedure increases the regional sample sizes by at least 30 percent.

For the Occupancy Survey the sample size for 1989/90 was approximately 80,000 establishment nights over the year.

3 SOME ADDITIONAL DEFINITIONS

Units within the tourist population

Regardless of the number of nights a tourist spends in a Region he or she is counted as only one Visitor. However during a single trip a tourist might spend some night(s) in each of several regions. Such a tourist is counted as only one Visitor to Queensland as well as being a Visitor with respect to each region visited. Thus the number of Visitors to Queensland will generally be expected to be less than the sum of the numbers of Visitors to each region.

Visitor Nights is the sum of visitors' lengths of stay measured in nights. Estimates of proportions relating to visitor nights may also be interpreted as measures in terms of visitors per night.

A Visitor Group is one person travelling independently or several persons travelling together, sharing expenses and travel decisions, in much the same way as a family would.

A Adult Group is defined as a group of one or more persons not accompanied on the current trip by a person less than 14 years of age.

A Family Group is defined as a group of one or more persons which for the current trip includes at least one person less than 14 years of age.

An Adult is defined as a person aged 14 years and over. A Child is defined as a person aged 0 to 13 years. Unless otherwise stated, statistics presented relate to both adults and children.

Purpose

Purpose refers to main reason for the trip. The full classification available is as shown on the questionnaires. For Summary Tables categories are grouped to provide a limited (LIM) Purpose classification as follows.

Holiday/Recreation (H/R) includes visitors whose stated main purpose of travel is pleasure/holiday, visit friends/relatives, sporting/relatives, sporting/recreation or working holiday.

Business covers the categories business, attending conference/seminar and conference/seminar plus tour.

Other includes educational/school excursion trips and short term visits for other purposes not specifically listed in the questionnaires.

Transport

Transport refers to main mode of transport, i.e. the mode used for the longest part of the relevant journey or activity. Note that, for overseas visitors who enter Australia through ports outside Queensland, Transport to Queensland relates only to the component of the journey which is within Australia.

Transport to the Region refers to travel from the Region of Queensland previously stayed at on this trip. Where the current Region is the first stayed at in Queensland on this trip, the relevant travel is the journey from home (for Queenslanders) or from outside Queensland.

The question referring to Transport to the Region along with that referring to Transport within the Region were first used in 1989/90 questionnaires and replace a less specific question employed in prior years.

Expenditure

Expenditure covers all cash outlays on accommodation (including pre-paid) and out of pocket expenses. Transport costs within Queensland are covered but expenditures on main transport to Queensland are excluded. No allowance is included for depreciation and the like in the costs of private car usage or costs of usage of other private equipment.

4 DETAILED TABLES

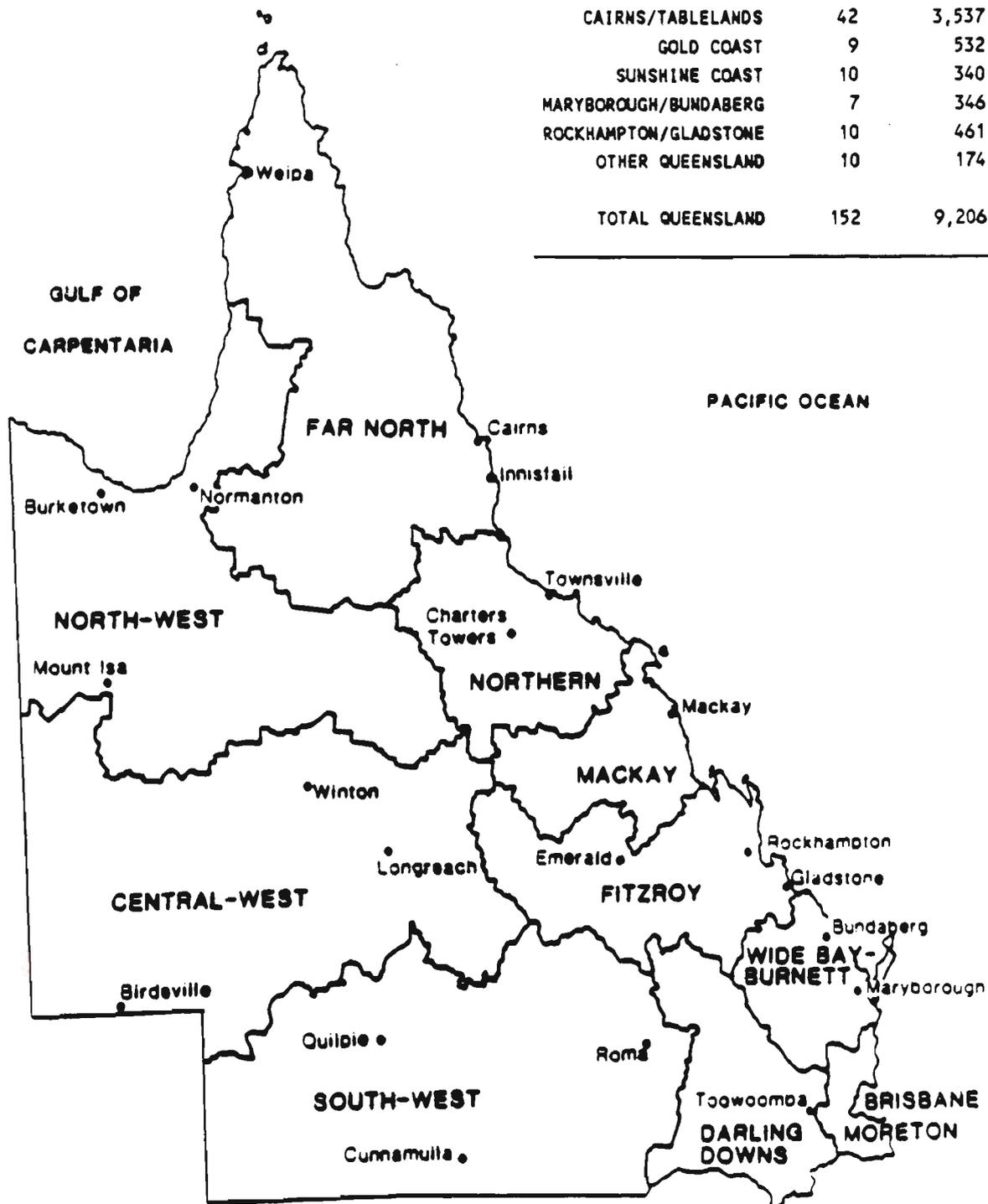
More detailed breakdown of the variables presented in these Summary Tables as well as other cross-tabulations of survey results can be provided. Requests for special tables should be addressed to the Market Research Section of the Corporation.

APPENDIX 2

Major Survey Research Programme Backpacker Regions

Number of Establishments and Beds in Queensland as at June 30, 1990

REGIONAL CENTRE	Number of Establishments	Number of Backpacker Beds
BRISBANE	30	1,175
MACKAY/PROSERPINE	12	1,130
TOWNSVILLE/BOWEN	22	1,511
CAIRNS/TABLELANDS	42	3,537
GOLD COAST	9	532
SUNSHINE COAST	10	340
MARYBOROUGH/BUNDABERG	7	346
ROCKHAMPTON/GLADSTONE	10	461
OTHER QUEENSLAND	10	174
TOTAL QUEENSLAND	152	9,206



APPENDIX 3
The Major Survey Research Programme
Questionnaire

10 HOW MANY YEARS IS IT SINCE THE MOST RECENT HOLIDAY VISIT TO THIS REGION BY ANY ADULT MEMBER OF THIS FAMILY GROUP?

QLD. RESIDENTS GO TO Q 17; otherwise ask

_____ years (00 = 6 mths or less)
(99 = skipping)

11 ARE YOU CURRENTLY ON A "PACKAGE" TOUR? - (i.e. A trip purchased at a price inclusive of at least main travel and accommodation)

1. Yes
2. No (Go to Q13)

12 IS THE PACKAGE ONE OF THE QTTC'S "SUNLOVER" PACKAGE TOURS?

1. Yes
2. No
3. Uncertain : Name of Package _____

13 ON THIS TRIP WHERE WAS YOUR FIRST OVERNIGHT STOP IN Qld.? (Write in, and enter Region code)
HOW MANY NIGHTS DID YOU STAY/ARE YOU STAYING THERE?
WHAT TYPE OF ACCOMMODATION DID YOU/ARE YOU STAYING IN?
(Enter accommodation code from list below)
NOW ABOUT YOUR NEXT STOP IN Qld., WHERE WAS/WILL THAT BE? HOW MANY NIGHTS, etc. (Repeat itinerary questions, covering trip to date and best estimate of future stay, until the total no. of nights in Qld. is covered)

- | | |
|-----------------------|------------------------------------|
| 1. Hotel/motel | 5. Friends/relations |
| 2. Hostel/guest house | 6. Free camping/camped by roadside |
| 3. Caravan Park | 7. Cruise/Charter Boat |
| 4. Unit/flat | 8. Other |

Place	Code	Nights	Accommodation
-------	------	--------	---------------

1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____
7.	_____	_____	_____
8.	_____	_____	_____
9.	_____	_____	_____
10.	_____	_____	_____
11.	_____	_____	_____
12.	_____	_____	_____
13.	_____	_____	_____
14.	_____	_____	_____
15.	_____	_____	_____

TOTAL NO. OF NIGHTS IN QLD. : _____

24 IN ADDITION TO THE TIME IN QUEENSLAND, HOW MANY NIGHTS WILL YOU/YOUR GROUP HAVE SPENT IN OTHER AUSTRALIAN STATES ON THIS TRIP?

: _____ nights

15 WHAT WAS THE MEANS OF TRANSPORT USED TO ENTER QLD.?

: _____ (Enter code from list below)

- | | |
|----------------------|--------------------|
| 1. International Air | 5. Private vehicle |
| 2. Domestic Air | 6. Rented vehicle |
| 3. Rail | 7. Other |
| 4. Coach/bus | |

INTERSTATE VISITORS GO TO Q 17

16 WHERE DID YOU ENTER AUSTRALIA?

: _____ (Enter code from list below)

- | | |
|---------------|--------------|
| 1. Brisbane | 5. Melbourne |
| 2. Cairns | 6. Perth |
| 3. Townsville | 7. Darwin |
| 4. Sydney | 8. Other |

17 WHAT WAS THE MAIN MEANS OF TRANSPORT USED TO COME TO THIS REGION?

: _____ (Enter code from list below)

- | | |
|----------------------|--------------------|
| 1. International Air | 5. Private vehicle |
| 2. Domestic Air | 6. Rented vehicle |
| 3. Rail | 7. Other |
| 4. Coach/bus | |

18 WHAT WILL BE THE MAIN MEANS OF TRANSPORT USED TO LEAVE THIS REGION?

: _____ (Enter code from list at Q17)

19 HOW ARE YOU MAINLY TRAVELLING AROUND WHILE IN THIS REGION?

: _____ (Enter code from list below)

1. Public transport or taxi
2. Private vehicle
3. Rented vehicle
4. Other

FOR THOSE WHO DID NOT USE AIR, RAIL OR COACH AS A MAIN MEANS OF TRANSPORT GO TO Q 21

20 WHERE DID YOU PURCHASE YOUR MAIN TRAVEL TICKETS?

1. From transport operator
2. Private Travel Agent
3. Qld. Government Travel Centre (Tourist Bureau)
4. Other Government Tourist Bureau
5. Bank Travel Service
6. Motoring Organisations
7. Other (specify _____)
9. Skipping

21. HOW I NEED SOME INFORMATION ABOUT YOUR (FAMILY'S) TRIP EXPENDITURE IN THE PAST 24 HRS. LAST NIGHT WHERE DID YOU STAY? (IF outside Qld./at home in Qld. ask) AT WHAT TIME TODAY DID YOU ARRIVE IN Qld./START YOUR TRIP WITHIN Qld.? (Start questions from this time, otherwise start at dinner last night.

Enter expenditures, whole \$'s only, in appropriate columns in the table. Where cost not known - eg. a day tour that is part of a package - show details of activity/item in a note at the foot of this page)

LAST NIGHT DID YOU EAT AT THIS ESTABLISHMENT; WAS DINNER COST INCLUDED IN YOUR ACCOMMODATION CHARGE? (IF NOT) DID YOU/YOUR FAMILY EAT OUT, BUT TAKE-AWAY, ETC. WHAT DID DINNER COST FOR ALL OF YOU?

AFTER DINNER WHAT DID YOU/YOUR FAMILY DO? DID YOU/YOUR FAMILY INCUR ANY COSTS?

BREAKFAST (ask as per dinner)

AFTER BREAKFAST WHAT DID YOU/YOUR FAMILY DO? HOW MUCH DID YOU/YOUR FAMILY SPEND? WHAT DID YOU DO NEXT? ETC.

LUNCH (ask as per dinner)

AFTER LUNCH (ask as for after breakfast. Question until just prior to dinner tonight including estimates of costs between now and dinner)

ARE THERE ANY OTHER EXPENDITURES WE MIGHT HAVE MISSED? (Prompt) SHOPPING, FILMS, PAPER ETC. DID YOU USE A RENTAL CAR?

EXPENDITURE - QUESTIONS 21 AND 22						
Food and Beverages		Pleasure Shopping (clothes, Gifts, Souvenirs)	Transport Fares including Day Tours	Vehicle Expenses		Other (Entrance Fees, Hire, Films, Incidentals)
At this Establishment	External (including Groceries)			Petrol Oil, Repairs	Rental	
\$: : : :	\$: : : :	\$: : : :	\$: : : : :	\$: : : : :	\$: : : : :	\$: : : : :

22. IS TONIGHT YOUR LAST OVERNIGHT STOP IN QUEENSLAND ON THIS TRIP?

- 1. No (Go to Q23)
- 2. Yes Continue

- Starting at dinner tonight continue to record (forecast) expenditures (excluding accommodation costs) for the period up to the respondent's time of departure from Qld. Repeat as in Q 21.

NOTES: _____

3. WHAT IS THE TOTAL COST PER NIGHT, OF THIS ACCOMMODATION?
 (include all members of family group on this trip)

\$: ___:___:___ .00 per night cost _____
 or
 nights _____

(For those on package tours obtain estimate or tariff guide from reception and include with return)

4. WHICH MEALS ARE INCLUDED IN THIS ACCOMMODATION COST?

(0 = not included;
 1 = included)

: ___: breakfast

: ___: lunch

: ___: dinner

5. WHAT IS YOUR OCCUPATION/THE OCCUPATION OF THE 'HEAD' OF THIS 'FAMILY' GROUP ON THIS TRIP?

: ___: (Enter code from list below)

- | | |
|----------------------|-------------------------|
| 1. Professional | 6. Semi/Unskilled |
| 2. Technical/trade | 7. Home duties |
| 3. Clerical/sales | 8. Retired/Not employed |
| 4. Self employed | 9. Student 14 yrs + |
| 5. Manager/executive | |

6. FOR EACH ADULT PERSON IN YOUR FAMILY ON THIS TRIP WHAT IS THEIR SEX AND AGE GROUP?

A D U L T	SEX		AGE GROUPS						
			14 to 17	18 to 19	20 to 24	25 to 34	35 to 44	45 to 59	60 +
	M	F							
1st	1	2	1	2	3	4	5	6	7
2nd	1	2	1	2	3	4	5	6	7
3rd	1	2	1	2	3	4	5	6	7
4th	1	2	1	2	3	4	5	6	7
5th	1	2	1	2	3	4	5	6	7
6th	1	2	1	2	3	4	5	6	7
7th	1	2	1	2	3	4	5	6	7
8th	1	2	1	2	3	4	5	6	7

INTERVIEW FINISH TIME: _____

INTERVIEWER: _____

APPENDIX 4

**The Major Survey Research Programme
Supplementary Backpacker Questionnaire**

Hostels Supplementary Questions

(N.B. This page must be attached securely to QTTC1)

27. What was your main source of information about hostels in Queensland for this trip?

1. Backpacker magazines/guides
2. Youth Hostels Association
3. Other books or magazines
4. Travel agent/travel brochure
5. Word of mouth (friends/relatives)
6. Other

28. What are the attractions, activities or features that are of most interest to you for this visit to this region? (Enter codes from list below).

--	--	--

1st

--	--	--

2nd

--	--	--

3rd

- | | | |
|------------------------|-----------------------|--------------------------------------|
| 01 Diving/snorkelling | 07 Island visits | 13 Cultural/art/craft |
| 02 Sailing/windsurfing | 08 Bushwalk/drive | 14 Shopping |
| 03 Fishing/boating | 09 Scenic tours | 15 Nightlife/
entertainment |
| 04 Reef cruises/tours | 10 Other nature based | 16 Theme parks/
amusement centres |
| 05 Beach related | 11 Sport | 17 Other |
| 06 Climate | 12 Lifestyle | |

29. Other than Queensland, which other Australian States have been or will be visited for some night(s) on this trip? (Insert 1 in the box under each state visited, 0 otherwise).

NSW	VIC	SA	WA	NT	ACT	TAS

30. Which other countries have been or will be visited for some night(s) on this trip? (Complete as for 29).

NZ	PNG/ Pacific Is.	S.E. <i>Asia</i>	Other Asia	Europe	Nth. America	Other

31. (a) Do you intend to holiday again in Queensland in the near future, say within the next 5 years?

1. yes (ask 31 (b))
2. no (go to 32)
3. uncertain (go to 32)

(b) Would you stay in hostels for such a holiday?

1. yes
2. no
3. uncertain

32. How would you rate your stay in hostels in Queensland?

1	2	3	4	5
	Good	Just Acceptable	Unsatisfactory	Very Unsatisfactory