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THE BACKPACKER AND SCOTLAND: A MARKET ANALYSIS

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The primary objective of this study was to investigate the backpacker market and thus the characteristics and motivating factors of backpackers in order to establish the potential of this market. Subsequently through empirical research, based on standard survey techniques to investigate the extent to which backpackers and thus backpacking in Scotland evidences similar characteristics and to explore their expenditure patterns with the overall objective of establishing broad indicators as to whether this particular form of tourism activity holds potential as a market for promotion and development in Scotland. The findings of this research lead to the proposal that backpackers are a potentially valuable niche market with specific and complementary advantages over other more general forms of tourism which Scotland should be seeking to develop.

Keywords: *tourism, promotion, niche markets, backpackers, marketing analysis, Scotland*

INTRODUCTION

A review of the marketing and promotion of Scotland over the last two decades predominantly though not solely, by the Scottish Tourist Board (now VisitScotland) finds that it has been dominated by attention to traditional markets e.g. America and continental Europe with little attention to other source areas, with the exception of Japan. Attention to the promotion of activity based tourism demand has also been limited, predominantly restricted to the traditional activities and interests e.g. rural pursuits, golf and whisky. There is no doubting that the marketeer cannot afford to ignore traditional markets nor that activity based tourism demand is increasing. However and especially given the highly competitive international marketplace that destinations operate in, there is a need to search for other markets with potential for development. The attention given to backpacking over recent years by the media through, for example, Garland's "The Beach", gap years and regretable incidents of fatalities suggest that this is an activity that is growing in participation. It is therefore this market that is explored and investigated here. The aim first is to establish the main characteristics of the market which serve to differentiate it from more general markets such as `mass tourism' and also whether perceptions of increasing demand are well founded. Secondly, to investigate the expenditure of backpackers to gain insights into the market's potential economic contribution; a fundamental factor as regards whether or not to promote this niche market. The focus then turns to the findings of research undertaken directly into backpackers in Scotland.

DIFFERENTIATING BACKPACKERS FROM `MASS' TOURISTS

Backpacker travel undoubtedly has existed for centuries but in terms of modern tourism it is probably most readily associated with the `hippies' of the 1960s - otherwise known as `drifters', who travelled off the beaten track and tried to escape from the accustomed way of life of their home country (Loker-Murphy & Pearce, 1995). In the 1970s "drifters" became "long term budget travellers" and then, during the 1990s, "contemporary backpackers" combined with the alternative categorisation of `modern youth tourism' (Loker-Murphy & Pearce, 1995). This changing terminology reflects the notion of development and expanding popularity leading to perceptions that ".... simple peer pressure or ‘me too-ism’ has made the round the world trip non-negotiable." (Calder, 1999:45) and suggestions that backpacking is becoming the norm - a rite of passage for many young people (Suvantola, 2002; Westerhausen, 2002; Richards and Wilson, 2004).

But this changing terminology also suggests that over time backpacker demand has shifted from being a predominantly homogenous market to one evidencing variations and heterogenity thus some potential degree of segmentation. However, first we need to differentiate between backpackers and more general tourists e.g. mass tourists, which we can achieve using the following general characteristics drawn from Moshin and Ryan, (2003), Noy, (2004), Suvantola (2002) and Keeley (1995):

- *type of accommodation used:* low cost, basic with limited services and facilities;
- *duration of trip:* the overall trip is far longer with comparatively long stays in various destinations;
- *degree of organization:* essentially arranged independently by the backpacker;

- *destination activities*: in general they tend to avoid the more popular tourist attractions, prefering activities which allow for personal input though this is not always so (Moshin and Ryan, 2003);
- *transportation within destinations*: predominantly they use public transport systems.

Table 1. Comparison of indicative characteristics: Backpackers and "mass tourists"

Characteristic	Backpackers	Mass Tourists
Age	Generally between 18-30 years old	Any age group, wide range.
Accommodation Used	Low Tariff. Hostels, Camping, Backpacker Hotels, Homes of friends and family.	High Tariff. Hotels etc., Self-Catering Apartments, All Inclusive Resorts.
Transport Used to get to Destination	Plane	Plane
Transport Used when in Destination	Public transport, e.g. local train and bus services.	Private car, private coach.
Trip Duration	Longer than brief holiday, length varies greatly, from 1 month to 1 year.	1-2 Weeks
Degree of Organisation	Independently organised, flexible travel plan. Most elements are not pre-booked, only outbound flight.	Packaged, organised by tour operator, inflexible. Components of holiday product are pre-booked at home.
Holiday Activities	Emphasis on informal and participatory holiday activities. Participate in wide range of activities.	Day trips organised by tour operator. Sightseeing.
Expenditure	Limited, travels on a budget.	Comparatively large amount of money to spend.

Derived from: Westerhausen, 2002; Loker-Murphy & Pearce, 1995; Goodwin, 1999; Smith, 1989.

A comparative analysis of the differences in travel patterns between the `stereo-typical' backpacker and `stereo-typical' mass/package tourist, is presented in Table 1 based on indicative characteristics which today are not so unequivalently applicable to all (Moshin and Ryan, 2003). These differences are attributed to two factors. First, backpackers comparatively are `time-rich' but have limited funds (Gray, 2000) whilst the `mass tourist' comparatively is `cash-rich' but `time poor' i.e high expenditure on their `annual holiday' of about two weeks. Secondly, backpackers tend to distinguish themselves from other types of tourist i.e. 'travellers' and the associated connotations of adventure, individuality and self-discovery (Suvantola, 2002; Westerhausen, 2002). It may be argued therefore that backpackers tend to undertake different activities and avoid places considered 'too touristy'. *As such they may be considered to have characteristics in common with "alternative tourists".* A view which holds implications for the approach to marketing.

DEMAND

To develop any market, it is important to understand determinants of demand and supply. First, an analysis of motives for backpacker travel leads to establishing the following major motivators (Moshin and Ryan, 2003; Sorensen, 2003; Suvantola, 2002):

- *the notion that travel broadens the mind*; that the experience of other cultures helps to inform and gain an understanding of cultural differences. These are related to education and the improvement of one's knowledge. To satisfy this motivation travel is necessary and thus it acts as a `push' factor.
- *travel provides the opportunity to mix with other like-minded individuals*; the opportunities presented through backpacking to meet other people, especially other backpackers, and to make new friends is another major `push' factor.
- *travel is a way that young people can postpone certain socio-economic decisions*; for example, starting a career and/or settling down e.g. marriage. Therefore backpacking may be viewed as the last opportunity to travel free from the responsibilities of working life.

In combination, these factors suggest the destination itself is not the major motivating factor but rather the pursuit of personal development and discovery which may be satisfied in any country where it is possible to travel in the desired manner. However, the choice of country/countries is important. Generally, backpackers are considered to travel from `the west' to `the east' (Sorensen, 2003) ".... to escape the constraints of life in Western society." (Westerhausen, 2002:32). In this respect the destination would be significant, the choice of which is likely to be influenced by peer groups and other backpackers; word of mouth and the 'grape vine' are seen as major information sources and influential factors for backpackers.

Although the market is perceived to have grown substantially over the last twenty years (Westerhausen and Macbeth, 2003) it is difficult to quantify this in many destinations because backpackers are often not differentiated within visitor surveys. A potentially good indicator are occupancy figures from hostels (Keeley, 1995; Speed, & Harrison, 1999) whilst another way would be to take as a benchmark the figures from the tourist statistics of a country which does differentiate, for example, Australia, though due consideration would need to be given to the popularity of such countries. An alternative approach is to analyse the supply side; for example, the evident increase in the supply of products orientated to backbackers e.g. The Lonely Planet guides (Suvantola, 2002), and the establishment of backpacker routes in evidence in Australia and India (Scheyvens, 2002). We can also identify a growth in the provision of inexpensive accommodation in popular areas; Bali in 1977 had 14 such places, by 1994 this had increased to 34 places (Suvantola, 2002). The hostel market, in particular, has grown significantly and is no longer dominated by the International Youth Hostel Federation. Transport has also been a contributory factor. The introduction of Inter Rail passes in the 1970s facilitated backpacker travel across Europe at discounted rates. Similarly a number of bus/coach operators now have dedicated ticketing arrangements for backpackers which allow unlimited travel within certain areas or specified time frames (for example, National Express in Britain, Greyhound in the USA and Canada, and Greyhound Pioneer in Australia). In total, these developments bear witness to increased demand and lead to speculation that a degree of `institutionalisation' is developing.

EXPENDITURE

A key element to consider in the analysis of any tourism market is its potential contribution to the destination's economy. In the case of this market there are contrasting views. A key perception is that they do not contribute significantly to the destination country in economic terms being "...widely regarded as the penny pinching, unprofitable end of the tourism market..." (Dalton, 2000:8). In contrast, Westhausen and Macbeth (2003) and Scheyvens (2002) argue that they contribute more than any other type of tourist, albeit their average daily spend is comparatively lower, because of their above average length of stay. Of particular importance is how backpackers' spend; being `cash-poor' requires careful budgeting and maximising the benefits of expenditure thus generally they are more likely to seek lower cost hospitality services and products. The significance of this is that lower cost services are more likely to be locally owned. A further economic benefit of this market is that backpackers tend to spread their spending over a wider geographical area; often `off the beaten track' (Scheyvens, 2002). Overall, and as the Goa foundation which condemns backpacker tourism, concluded: "With all its drawbacks, this kind of tourism still presents a healthy alternative to the five-star tourist culture. It is kinder to the environment and the local people involved." (Wilson, 1997:70)

THE STUDY

From the foregoing discussion, it appears that backpacker travel is growing and has the potential to provide additional benefits complementary to other forms of tourism to the host destination. But, as identified above, the majority of studies focus on Australia, India and developing countries with little reference to Europe and specifically Britain, thus still little is known about the backpacker market in these areas. To address this comparative paucity of attention and particularly to investigate the development potential of this market to Scotland a survey of backpackers in Scotland was undertaken with the primary aims of establishing a general profile and the main characteristics and expenditure patterns of these backpackers. A quantitative methodology facilitating statistical analysis was adopted based on a survey involving a structured questionnaire. Due attention was given to the sequence of questions, presenting these in appropriately labelled sections to guide and help focus respondents, commencing with enquiries about the overall trip before considering the visit in Scotland, which encompassed motivations and expenditure patterns and concluded with personal profiling factors. Glasgow, as a major arrival/departure point for Scotland as a popular destination for backpackers, was chosen as a suitable location for the empirical research (Speed and Harrison, 1999). It has seven hostels open all year from which a balanced selection comprising a small independent hostel, a Euro Hostel and a Scottish Youth Hostel (SYH) i.e. Glasgow Youth Hostel, was made. In recognition of the possibility of there being significant differences between backpackers at different locations in Scotland, the SYHA hostel in Edinburgh was included thereby enabling an element of comparative analysis between the two locations.

As identified in the opening section, backpackers have a preference for budget accommodation e.g. hostels; thus, an effective way of reaching backpackers is through hostel accommodation. However, it was recognised that this would exclude backpackers using different types of serviced accommodation but in counterpoint, hostels are the preferred choice of backpackers in the U.K. (Shipway, 2000; Nash et al, 2006). The questionnaires were distributed in person to backpackers in communal rooms in the various hostels on different days and at different times over a four week period. Few problems were experienced during the implementation of the survey. Due largely to the personal and explanatory approach non-backpackers at the hostels did not participate and of the backpackers approached only two did not participate due to language problems i.e. Japanese. A profile of responses per hostel is presented in Table 2; not surprisingly, the majority (44%) were from the Euro Hostel which has the largest capacity [300 rooms] of the hostels visited. However, both SYHA hostels and the independent hostel are well represented in terms of their capacity.

Table 2. Profile of responses by hostel

Hostel	Completed Questionnaires	Sample (%)
Hostel A	22	21
Euro Hostel	45	44
SYHA Glasgow	16	16
SYHA Edinburgh	20	19
Total	103	100

FINDINGS

It is not the intention here to present all the data drawn from the backpacker survey but rather to concentrate on those aspects which enable comparison with the general characteristics established above. In addition, the findings specific to Scotland and backpacker expenditure patterns are explored.

Backpackers' profile

A summary of socio-demographic factors of the respondents is presented in Table 3 which shows a balance between the sexes. The majority [82%] of these backpackers are under the age of thirty (consistent with Loker-Murphy & Pearce (1995) and Shipway (2000) and single [91%], which supports the motive for backpacker travel as a means of postponing certain socio-economic decisions, e.g. marriage. Although backpackers are generally thought to be students [51%] evidently this is not necessarily the case, which correlates with Moshin and Ryan's (2003) study.

Those respondents in employment represented a diverse range of of occupations [e.g.engineer, teacher, business analyst, nurse] which mirrors Speed and Harrison's (1999) findings. Affirming the large number of students and professionals within the sample, 69% of respondents were found to be educated to degree level or above. A significant proportion [41%] of them were travelling alone, undertaken equally by both sexes, or with one other person [35%] e.g. boy/girl friend. Although the majority are `young, single and students' thus reflecting the traditional profile of backpackers, the presence of `older and employed' participants bears witness to increasing heterogenity in this market (see Cohne, 2003).

Table 3. Profile of respondents

Profile factors	**Category**	**Response (%)**
Sex	Male	49
	Female	51
Marital Status	Single	91
	Married	5
	Separated	1
	Widowed	3
Age Group - years old	16-18	2
	19-24	52
	25-29	30
	30-39	10
	40-49	4
	50 plus	2
Country of Residence	UK	14
	Continental Europe *	35
	USA/Canada	17
	Australia/New Zealand	27
	Other **	7
Employment Status	Student	51
	Full-time	34
	Part-time	4
	Not currently employed	6
	Other	5
Education	Secondary school	11
	Diploma	20
	Degree	52
	Postgraduate qualification	17

* European countries included: France, Spain, Germany, Netherlands, Belgium, Switzerland, Norway, Denmark and Republic of Ireland.
** Other countries included: Tanzania, S. America, Bangladesh, Japan & Taiwan.

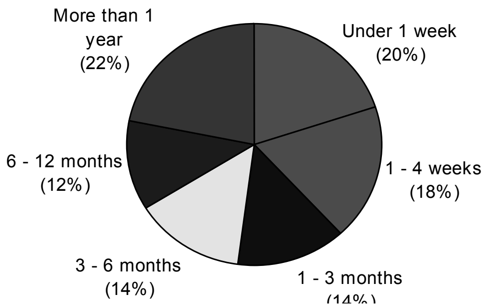
The majority of these backpackers are overseas tourists; continental Europe perhaps somewhat surprisingly given the perceptions that the flow is usually seen as `West to East', accounting for the largest source [35%] followed by Australia/New Zealand [27%]; findings comparable with Nash et al's (2006) study. Examination of gross tourist flow data for Scotland reveals that 9% of tourist trips are undertaken by overseas tourists, with this figure increasing to 15% for Glasgow (VisitScotland, 2002a). One might expect a similar percentage of overseas visitors to be represented within the backpackers staying at Glasgow hostels. However, 86% of the respondents staying at Glasgow hostels were overseas tourists - markedly higher than 15%, suggesting that a substantially higher proportion of backpackers are from overseas than in other categories of tourists to Glasgow. The major motivation for the overall trip, accounting for 45%, was to experience other cultures and environments, followed by education/improving knowledge [18%] [see Table 4]; both of which were given as secondary motives. No significant differences on the basis of correlation analysis using demographic variables were identified suggesting that the motives for backpacker travel are generic, in a sense part of `backpacker culture'. Overall, the profile of these backpackers bears many similarities to that of "socio-cultural tourists" with the notable exception of age. The latter tend to be older (40 years old plus). Interestingly in the case of Glasgow, the age profile of socio-cultural tourists includes a higher proportion of comparatively younger tourists (Leslie, 2002).

Table 4. Motivations for trip

Motive	Respondents main motive (%)	Respondents secondary motives (%)
Meeting local people	3	48
Mixing with fellow travellers	1	39
Education/Improving knowledge	18	65
Experiencing other cultures/environments	45	78
Seeking excitement & adventure	7	48
Leisure & relaxation	12	48
Visiting friends and family	5	17
Other	9	19

The overall duration of these trips evidently varies considerably (see Figure 1). The significant number of those being away for four weeks or less brings into question the general characteristic that these are usually long trips, and subsequently total expenditure during the stay in any one destination country compared with other types of tourist. Backpackers from Australia/New Zealand were found to take the longest trip duration whilst for those from the USA and Canada no one duration was noticeably favoured by a majority of respondents. The respondents whose trip duration was comparatively short (four weeks or less [38%]), not surprisingly perhaps, are from other European countries. This finding conflicts with the traditional perception of backpackers travelling from `West to East', supports Moshin and Ryan's (2003) and Cohen's (2003) findings and confirms declining strength of homogeneity in this market. This is of particular significance in the context of target marketing.

Figure 1. Total duration of trip



Visit to Scotland

Although the majority of respondents [66%] had previously visited the UK, many [30%] had not previously been to Scotland. The reasons given for visiting Scotland, primarily ‘scenery and landscape’ and ‘history and historic sites’ (see Table 5), tend to correlate with the motivations given for the overall trip (see Table 4); for example, to learn about Scotland's history equates with ‘education/ improving one's knowledge’. *It is not clear however which the primary reason of choice is. Whether it is to visit Scotland as a country motivated, for example, by `word of mouth' by peers elsewhere, and thus a `push' factor or whether the natural and cultural resources are serving as the `pull' factor.* Evidently for the majority of backpackers the visit to Scotland is taken within the context of visiting the U.K. - essentially England. However, for one in five backpackers [predominantly Europeans] Scotland was identified as a primary choice of destination whilst for the majority of participants it was part of a longer extended tour.

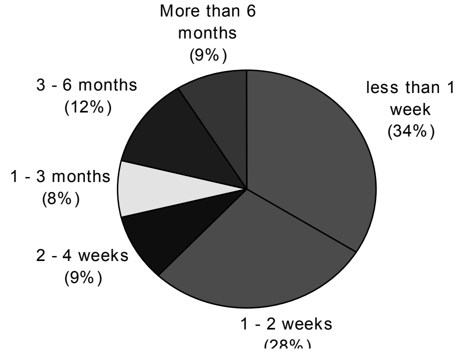
The desire to visit Scotland for its history [notably similar to other tourists] is also emphasised when examining the activities that respondents have undertaken; for example: 70% cited visits to historical sites and 72% visits to museum and galleries compared with overseas holiday tourists at 83% and 58% respectively (VisitScotland, 2002b). *Overall this suggests that rather contrarily to earlier comment, the touristic activities of backpackers are not that dissimiliar to other types of tourist, particularly comparable with socio-cultural tourists and, given their consideration to the landscape and scenery, with "eco-tourists".* However, the latter differ from cultural tourists in the sense that they have a rather different profile - older and more orientated to the built heritage and the arts. But as regards the places of interest visited backpackers are also generally similar to other international visitors to Scotland but more likely to visit musuems and art galleries and given this factor are closer to "cultural tourists". Thus one might speculate that backpackers are younger "eco-cultural tourists".

Table 5. Reasons for visiting Scotland

Reason	Respondents (%) *
Scenery and landscape	76
The country's history and historic sites	72
Peace and quiet	22
Entertainment & recreation facilities	13
Part of tour of the UK	20
Part of itinerary of organised tour	1
Just passing through	5
Visiting friends and family	14
A specific attraction or event	10
* More than one reason could be selected by respondent	

While travelling in Scotland, as expected, hostel accommodation is the main type of accommodation used, which reflects the findings of both Keeley (1995) and Nash et al (2006). The most popular sources for obtaining information were the internet and guide books [75% of backpackers], which supports the findings of Nash et al's (2006) study. Indications of a relationship between age and internet use are evident. In the 19-24 years age category, 83% of respondents used the internet as a source of information while in Scotland but as the age category increases the number of respondents using the internet decreases; for example, 60% of 30-39 year olds compared with 25% of 40-49 years old. The train and/or coach were the most commonly used means of transport for travel within Scotland, which is in marked contrast to the great majority of other types of visitor who predominantly use a car.

Figure 2. Intended length of stay in Scotland



The majority of backpackers [62%] intend to stay in Scotland for less than two weeks, whilst 38% are staying considerably longer [see Figure 2] which, on average, is of shorter duration than that found by Shipway (2000) [i.e. 50% staying for one month or more compared with [29%] but is similar to Speed and Harrison (1999) and Nash et al, (2006)]. Compared with other countries the length of stay in Scotland is shorter; for example, the majority of backpackers in Australia (65%) stayed between four to twelve weeks (Loker-Murphy & Pearce, 1995) and in India backpackers tend to stay for approximately three months (Goodwin, 1999). However, such comparisons are flawed, to an extent, given that Scotland is a part of the UK and as backpackers travel around within destinations their overall stay in the U.K. will be longer in many cases. Even so, the findings do affirm that backpackers generally stay longer than other tourists i.e. the average length of UK residents' visits [which account for about 90% of the total market] to Scotland is 3.6 nights and for overseas visitors the average is 9.4 nights (VisitScotland, 2002b). An influencing factor in length of stay is a combination of when the visit takes place and potential employment opportunities. Basically backpackers appear to stay for longer during the spring/summer, a period when short-term employment opportunities are more readily available. The significance of the length of stay lies in the overall expenditure and thus we now turn to this aspect.

Expenditure patterns

To obtain an overview of expenditure patterns, respondents were invited to detail their expenditure for the previous day. As per tourists in general, accommodation, transport and food and drink are the primary constituents of backpacker expenditure [see Table 6], the majority of whom [82%] spent between £6-15 on accommodation per night and £1-£10 per day on food and drink. Expenditure on transport varied considerably depending on the activities undertaken, for example visiting other areas, purchase of onward travel tickets or staying in the locality. The low expenditure on attractions is not surprising perhaps given Glasgow and Edinburgh have many free attractions. Spending on `entertainment' was also quite low considering that 79% of backpackers surveyed said they visited pubs and clubs while in Scotland, but these figures are a `snapshot' of what, at best, can be described as an indicative day. Overall, the majority of respondents did not spend any money on shopping, gifts and souvenirs, attractions and entertainment on the previous day. A finding which is hardly applicable to other visitors. Also many backpackers work part time in order to help finance their trip; estimated to be around one in every five (Swanson, 2000). As Uriely expressed, in such situations they may be termed "working tourists" (2001:2).

Table 6. Backpackers' expenditure

Respondents Expenditure in Preceeding 24 hours by Category (%)

Amount Spent	Accom-modation	Transport	Food & Drink	Shopping	Gifts & Souvenirs	Attractions	Enter-tainment
£0	7	33	7	80	82	78	68
£1 - 5	0	38	33	8	9	4	4
£6 - 10	27	15	37	5	3	15	15
£11-15	55	6	11	0	1	2	2
£16 - 20	5	3	7	1	1	1	6
£21 - 30	4	3	1	3	2	0	4
£31 +	2	2	4	3	2	0	1

Aggregating these figures, we can establish an average spend for the day of £37.97 per respondent - a useful indicator albeit it does not reflect the expenditure patterns of all backpackers. As noted, some backpackers spend considerably less per day - generally those who are staying longer in Scotland. If we take Speed and Harrison's (1999) finding of £28 per day and based on an average stay of four weeks [a conservative figure] then overall expenditure equals £784 for the time spent in Scotland compared with an average for overseas visitors of approximately £450 (VisitScotland, 2002a).

Summary of findings

First, the profile of the overall trip and the motivations of backpackers to Scotland is similar to the general characteristics, including increasing heterogenity, identified from the earlier studies. Secondly, key characteristics of these visitors to Scotland, as presented in Table 7, demonstrate significant differences between this market and Scotland's major tourism markets. That the majority of these backpackers are from overseas, including continental Europe, is especially significant given the proportionally small number of overseas visitors [approximately 10%] to Scotland.

Table 7. Key characteristics of Scotland's backpacker market

*	Tend to be young, single students, educated to degree level.
*	Predominantly from other European countries and Australia/New Zealand.
*	The visit to Scotland is usually included in the itinerary of a European or world wide trip, which may last for more than one year.
*	Stay possibly for less than two weeks. However, it is likely that during summer months the duration of stay is longer as many backpackers may work part time in order to supplement their budget.
*	Mainly use hostels and public transport
*	Utilise the internet as an information source while in Scotland.
*	Visit many places in Scotland.
*	There are indications that a 'backpacker route' for places to visit is becoming established.

Particularly significant are the general expenditure patterns identified:

- Though the average daily expenditure is lower than that of other visitors the comparatively longer stay means higher overall expenditure during their time in Scotland.
- Their spending is more widely geographically spread than for many other visitors, for example, compared with major market segments such as business/conference visitors.
- The primary constituents of expenditure are accommodation, transport and food and drink, which is as per tourists generally. However, this expenditure is likely to have different impacts on the economy at the regional/local level than that of other tourist spending. For example, when compared with business tourists, there may be a lower level of

financial leakage from backpackers' spend since they have a higher propensity to purchase local products and services;

In the context of sustainability, the market evidences a number of pluses namely independent travel, use of public transport to travel within Scotland and they are more likely to support locally owned businesses.

CONCLUSION

The opening discussion of backpackers and the market in general established a number of significant points. First, as the literature attests, attention to this form of tourism is comparatively recent and often limited to Australia, New Zealand and the Far East. Even so, it is apparent that the backpacker market has developed since the `hippy/drifter' times of the 1960s and 1970s, the popularity of backpacking has increased and a more diverse range of people are participating. What was once a fairly homogenous market comprising `twenty-something year olds' taking `time-out' before settling down has developed, on the basis of demographics, a more heterogenous profile, but with comparative consistency on motivations and wider variations in the duration of the overall trip. These factors are all evident in the data from the survey of backpackers in Scotland. However, and although the methodology was appropriate, a wider sample drawn from across Scotland would have enabled some degree of exploration of the data to establish if there are significant variances between potential categorisation of backpackers; for example on the basis of arrival points in Scotland, duration of visits varying according to origin or age grouping. Also, during the undertaking of this study little evidence was found of attention to this market and thus an area for further research would be to investigate the level of awareness and extent to which it is actually recognised by tourism agencies in Scotland, and the UK more generally. This particular area of further research is now being undertaken.

Even so, the growing popularity of backpacking, the emergent diversifying profile of backpackers and that they are from overseas, independent and seeking `other experiences' collectively indicates that this form of tourism is a market for development. One which holds comparative advantages with the major traditional markets i.e. international, longer average stay, higher propensity to spend on locally owned services and facilities. This `added value' supports diversity in supply and also that promoting this segment is not generally going to increase the competition amongst those suppliers e.g. hotels, orientated to the current major markets. Overall, a combination that indicates it is a particularly attractive alternative market with additional economic benefits for Scotland. However, the emerging diversity and increasing heterogeneity presents a challenge to marketeers in terms of target marketing; not least because of the "push" motivational factors and the absence of a specific "pull" factor necessary for marketing under the umbrella of "special interst" tourism. In effect, the backpacker market holds the potential to segment into sub-groups - niche markets based on combinations of profiling factors. For example, the younger backpackers with traditional in profile could be a sub-group - "youth travelers" - the global nomads of tomorrow - a term coined by Richards and Wilson, (2003) whilst an older age grouping sub-group could be categorised as "eco-cultural" backpackers.

As the findings of this study overall indicate, Scotland already has popularity with backpackers and thus a position in the marketplace on which to build. The fact that there is ever increasing international competition in what is for tourism a global marketplace means that Scotland, particularly given its low overseas visitor base, simply cannot afford to ignore any market segment of potential, let alone one so predominantly comprising overseas visitors as the backpacker market.

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