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Change, choice and commercialization: backpacker routes in South-East Asia.

Mark P. Hampton¹ and Amran Hamzah²

1. Kent Business School, University of Kent.
2. Faculty of the Built Environment, Universiti Teknologi Malaysia.

Abstract.

South-East Asia has the oldest and largest backpacker trails. This paper examines the geographies of such flows, drawing upon the largest survey to date of backpackers in Asia using qualitative research to survey the key changes from the 1970s to the 2000s. Backpacker trails have changed significantly and new routes have emerged including the 'northern trail' (Bangkok - Cambodia - Vietnam - Laos). It is to be expected that routes change as backpackers constantly seek new places, pioneering for later mass tourism. However, this paper suggests that using institutionalization as a framework, these changing trails and backpacker 'choices' can be seen as driven by growing commercialization and institutionalization. This then operates in combination with external variables (travel innovations - low cost airlines, and new transport networks); exogenous shock (political instability, terrorism); and growing regional competition from emerging destinations such as Vietnam and Cambodia.

Key words: backpackers; institutionalization; travel flows; Malaysia; Thailand; Indonesia; Vietnam; Cambodia.

Introduction

“...tourism involves the movement of people through time and space, and, as such, differences in consumption patterns should be reflected in differences in movement patterns.” (McKercher, Wong & Lau, 2006: 647)

This paper examines one growing international tourism form – backpackers – who have idiosyncratic consumption styles and travel patterns. Across the world backpacker routes, or ‘trails’ have emerged, including India and Nepal, South Africa, Latin America, and Australasia. However, the South-East Asia backpacker trail is the oldest and is associated with Tony Wheeler’s first book ‘Southeast Asia on a Shoestring’ (1977) and the origins of the influential, ubiquitous *Lonely Planet* guidebooks. Also writing in the 1970s, Theroux, in his iconic work *The Great Railway Bazaar* (1975) described the well-established overland trail of young western tourists through Asia. Since then, although youth travel has changed significantly, developing from its ‘hippy’ roots to ‘mainstream’ backpackers (O’Reilly, 2006), South-East Asia remains one of the most popular backpacker destinations. This region is this paper’s focus given its continuing significance, volume of backpackers and variety and number of destinations.

Backpacker trails can be broadly defined as routes or circuits linking backpacker urban enclaves, coastal and inland resorts, and the main attractions within a region:

“These elaborately mobile communities are held together by a network of established routes, a circuit of pathways and passages that enable consumption of a range of

amenity-rich landscapes, while also insulating the traveller from the perils of solitary travel: the loneliness of the lonely planet.” (Allon, 2004: 50)

This paper examines the changing geographies of these ‘pathways’. Backpacker routes can be identified from the 1990s, compared with records of earlier backpacker routes, and then analysed to discover the key drivers for why the routes change. Have these trails evolved independently or are they ultimately driven by exogenous shock? Or is there a role played by the growing commercialization, and broader institutionalization of backpacker travel? What role, if any, does transport innovation play such as low cost airlines and their new routes? Finally, does the emergence of new routes linking emerging destinations such as Laos and Cambodia reinforce longer-term models of resort evolution (Butler 1980) as the backpackers move to newer destinations? This paper discusses these questions which have significant policy implications for tourism planning within South-East Asia and elsewhere.

Theorising Backpackers.

Although researchers understand the term ‘backpacker’ at some levels, there remains no internationally accepted definition. For a working definition backpackers can be defined as tourists who travel with backpacks, live on a budget, and normally travel for longer periods than conventional holidays, but as Maoz comments (2007), such blanket terms are not overly helpful. Early terms in the literature - such as ‘drifter’ (Cohen, 1973) - are more relevant to ‘hippy’ tourists in the 1960s and 1970s. Later work refers to ‘backpackers’ (Government of Australia, 1995; Hampton, 1998; Murphy, 2000; Noy, 2006; Pearce, 1990; Richards & Wilson, 2004; Rogerson, 2007; Scheyvens 2002; Teo & Leong, 2005). Riley’s definition remains helpful (1988: 317):

“people desirous of extending their travels beyond that of a cyclical holiday, and, hence the necessity of living on a budget. . .[T]hey are escaping from the dullness and monotony of their everyday routine, from their jobs, from making decisions about careers, and the desire to delay or postpone work, marriage and other responsibilities.”

This paper draws from a major study commissioned by the Malaysian Ministry of Tourism (MOTOUR) that analysed backpacker tourism across Malaysia and four other ASEAN countries. Government funding of such a study was significant given that, with the exception of South Africa (Rogerson, 2007, 2011; Visser, 2004; Visser & Rogerson, 2004), most tourism departments in Less Developed Countries (LDCs) are disinterested in backpackers and many discourage them. Of the more economically developed countries hosting backpackers, since the 1990s Australia has pioneered analysis and policy development specifically to increase backpackers’ contribution to local economies (Government of Australia, 1995; Pearce et al., 2009).

From the initial discussions with MOTOUR’s officials during the scoping of the study, there were four reasons for Malaysian government interest in examining the economic potential of backpacker tourism. First, senior officials in MOTOUR had been impressed with the success of countries that had specifically embarked on policies to facilitate backpacker travel such as Australia and South Africa. Secondly, most of MOTOUR’s top officials had themselves travelled extensively within South-East Asia while attending promotional missions and regional tourism meetings/conferences such as the annual ASEAN Tourism Forum, and had observed the significant presence of backpackers at airport terminals and even at mainstream tourism destinations. Thirdly, there had been numerous negative comments made by Malaysian State governments against the mushrooming of backpacker enclaves

especially along the east coast and islands such as the Perhentians (Hamzah and Hampton, 2013) which required Federal intervention in the form of clear policy guidelines from MOTOUR. Finally, the frequent requests by the Malaysian Budget Hotel Association (MBHA) for the relevant authorities to formulate less stringent standards for hotel development appropriate to the capacity of small operators implicitly alerted MOTOUR to the increasing demand for budget accommodation that catered mainly for backpackers.

It could be said that the academic study of backpackers perhaps reflected the disinterest shown by most LDC governments, and despite early exceptions (Cohen, 1973; Vogt, 1976) it remained under-researched. However, from the late 1990s research multiplied and explores different aspects of the phenomenon. Research has examined economic impacts (Hampton 1998, 2003, 2013; Scheyvens 2002; Lloyd 2003); behaviour and motivations (Muzaini 2006; O'Reilly, 2006); the Round-the-World trip (Molz, 2010); enclaves (Allon, 2004; Howard 2005); relations with the local community (Malam, 2008) and broadened the study from its original focus on South-East Asia to include other LDCs such as South Africa (Rogerson, 2007; Visser 2004); India (Hottola 2005; Maoz, 2007) and Mexico (Brenner and Fricke, 2007). The changing backpacker market is also exemplified in the new 'flashpacker' category (Jarvis & Peel, 2010) that describes wealthier independent tourists on shorter trips. However, despite this growing literature, little research exists on the geography of backpacker trails and what drives changes to these routes. This present paper seeks to fill some of those gaps.

Regarding the literature on conventional tourist flows, Oppermann (1995) conceptualised tourist flows in Malaysia and presented them in diagrammatic form. He proposed the 'multi-destination areas loop' for long-haul tourists in South-East

Asia. In this present paper, the question arises whether the backpacker trail is a 'multi-destination areas loop'? One difference between Oppermann's focus on conventional tourists and backpackers is that instead of returning to their 'home' at the end of the trip, backpackers return to the air hub entry point (typically Bangkok or Singapore) and return home. Alternatively, if they are on a Round-the-World itinerary, they travel from South-East Asia to the next region. Oppermann (1995: 61) noted that further research was required on the relationships between travel itinerary and 'travel-related variables'. This paper develops this, and explores the relationship between travel itineraries, overall flows, broader socio-cultural processes and what could be seen as 'exogenous travel-related variables'. It also examines the growing convergence between backpackers and mainstream tourism.

Lew and McKercher (2006), when reviewing the main spatial approaches to travel patterns, noted three main groups of variables: 'time budgets'; personality; and place knowledge. For 'time budgets', backpackers have more time to travel compared with conventional tourists who normally take shorter holidays. Conversely, backpackers tend to have small budgets and travel more slowly using cheaper transport to more remote destinations than conventional tourists. The second group of variables concerned personality and motivations. The third group of variables concern knowledge of place. There is also the role played by intermediaries (such as local specialist backpacker companies, *Lonely Planet*, *Guide du Routard* and other niche guidebooks/websites) as well as knowledge shared by other backpackers within the enclaves (Riley, 1988; Westerhausen, 2002) or en-route along the trail when travelling in specialist firms' minibuses. Lew and McKercher (2006) also listed three groups of variables for the destination: trip origins; attractions; and transportation. We return to these later.

Noy (2006) argued that the institutionalization of tourism is a useful framework within which to analyse changes to backpacker travel over time and corresponding spatial flows. He applied this to the growing number of Israeli backpackers since the 1960s and how this fundamentally affected their motivations and experiences and, at the same time, transformed the destinations' infrastructure. This development of theory recognises the changes seen in backpacker areas. It is also useful since initially backpacker tourism was seen as a form of non-institutionalised travel where individuals travelled outside formal, commercial systems (Cohen, 1982).

The argument that backpacking is becoming increasingly institutionalised over time has also been suggested by others including Hampton (2013), Sørensen (2003) and Westerhausen (2002). In this paper we add to this debate by arguing that in the case of South-East Asia, the process of institutionalization appears to be combining with external variables and exogenous shock, although the effect of the other variables on trip decisions and travel patterns (such as the role of face-to-face informal information sharing by backpackers within enclaves) is also recognised.

Methodology.

The research reported on here flows from a major study *The Contribution and Potential of Backpacker Tourism in Malaysia* commissioned and funded by the Malaysian Ministry of Tourism (MOTOUR) over 2006-7. The research team comprised four researchers (Malaysian and British academics) and two local research assistants (RAs). Since the team comprised both South-East Asian and European researchers, it was able to utilise their differing 'pre-knowledge' (Pagdin, 1989) of the main locations. The RAs undertook training and project induction, and mid-point reviews in each fieldwork location were held to log interim feedback from the RAs

about data collection and site characteristics. Final meetings were held before departure from each site to document emerging themes at that initial stage. This was done to systematically record individual site characteristics in a complex, multi-site research project.

To capture the backpacker routes' changes over time and the local impacts, a variety of techniques were selected as part of a 'mixed methodology' drawing from both quantitative and qualitative approaches. This was deliberate project design to maximise data collection. The main techniques were a questionnaire survey of backpackers (n=1218) and a series of in-depth semi-structured interviews (n=91) with backpackers, local service providers (accommodation, catering, transport and specialist firms such as bicycle rental and second-hand book shops) and policy-makers. Interviews were recorded in field notebooks, and transcripts written up on-site on laptop computers. Interview transcripts were then thematically coded in the project's analysis phase. At that time the questionnaires were also analysed using SPSS software. In addition, site mapping was undertaken of the supporting infrastructure (digital photos and the creation of annotated destination infrastructure maps), and finally, a brief review was undertaken of backpacker comments on two well-known internet blogs: TravelBlog (www.travelblog.org/Asia/Malaysia) and TravelPod (www.travelpod.org). These sites contained more than 1500 individual blogs so Content Analysis was used to cross-check interview themes such as personal reflections and micro-level descriptions about particular destinations.

The main study was a detailed examination of both existing and historic backpacker tourism across Malaysia with intense fieldwork using rapid appraisal techniques in seven main sites in both peninsula and east Malaysia (the states of Sabah and Sarawak), but also involved comparative field visits with further interviews

and questionnaires with backpackers and service providers in destinations in four other ASEAN countries: Thailand (Bangkok), Vietnam (Ho Chi Minh City), Cambodia (Phnom Penh, Siem Riep) and Indonesia (Bali, Yogyakarta). The project duration was 18 months. The main fieldwork period in July-August 2006 was designed to capture the peak season for most destinations corresponding with the main holiday season in the generating countries (mostly northern hemisphere, particularly Europe). The second shorter fieldwork period corresponded with the main Australasian holidays (December 2006 – January 2007) but this was happenstance rather than deliberate project design. Major backpacker destinations were selected as fieldwork sites to include the main forms namely: city enclaves (Khao San Road, Bangkok; Bukit Bintang, Kuala Lumpur), inland sites (Kinabalu Park, Sabah; Siem Riep); island destinations (Perhentian islands; Tioman) and coastal resorts (Cherating; Batu Feringghi, Penang). Historical data on early backpacker tourism from the late 1970s onwards was gathered from the existing literature. This was then cross-checked in interviews where possible with the oldest respondents who could confirm broad patterns as well as describe their own destination's development.

The project asked three research questions. First, given the lack of disaggregated data on the backpacker market in South-East Asia, baseline information needed collecting to develop a comprehensive profile of the backpackers. National tourism statistics, particularly international arrivals data, is only collected at aggregate levels for all tourist types and as yet no South-East Asian government has commissioned a detailed backpacker Visitor Survey. Thus one major task was to collect basic data (nationality, age, occupation, education level, length of stay, overall trip, weekly expenditure on food and accommodation etc.). This data was captured by the questionnaire and was designed to also reveal information about the backpackers'

local economic impact in destinations. In addition, the project aimed to collect and analyse backpacker travel patterns and flows within Malaysia and across South-East Asia. This was done through questionnaires and interviews and this generated new maps of the main backpacker flows and route development (see Figures below). Secondly, the project collected information on backpacker satisfaction levels concerning accommodation, other services and facilities as part of the trail question. This also drew on the questionnaires and interviews and is reported separately (Ministry of Tourism Malaysia, 2007). Thirdly, the project team was tasked with making recommendations for strategic policy and the management of backpacker tourism across Malaysia and to draw lessons for debates about location marketing and theories of how destinations change. In addition, the project examined what role (or not) was played by the emergence of low cost airlines in the changing trails over time.

This present paper reports our finding from one key area: backpackers' travel patterns and spatial flows. The policy recommendations were commissioned by the Tourism Ministry to assist future policy, planning and management within Malaysia and are reported elsewhere (Ministry of Tourism Malaysia, 2007). The report greatly increased the amount of information available, becoming "an invaluable resource for tourism policy-makers" (senior MOTOUR official) and fed into key strategic decisions about the role of small-scale tourism in Malaysia, including the decision to expand the 'homestay' programme (Ministry of Tourism Malaysia, 2008).

Changing Geographies of Backpacker Tourism

Backpacker Routes.

The main backpacker routes in South-East Asia have clearly evolved and there are important changes since backpackers first appeared in the region in significant

numbers. Given their tight budgets, backpackers typically use ground transport for intra-regional travel particularly local buses, minibuses and trains. In insular areas such as Indonesia and the Philippines local ferries are also used. In addition since the early 2000s, they have increasingly used low cost carriers (LCCs) such as Air Asia for both domestic and intra-regional transport. Here we divide the chronology into three sections: the early days of the 1970s; the trails of the 1990s; and more modern routes of the 2000s.

When academics began researching backpackers in South-East Asia in the 1990s, there was a basic route that is described below before moving to the more recent developments. Before then we can surmise the earliest route from the 1970s of the ‘drifters’ (Cohen, 1973) that formed part of the so-called ‘3Ks’ of Asia: Kabul, Kathmandu and Kuta, Bali. (See Figure 1).

[Figure 1 ‘Original 3Ks trail, 1970s]

More historical research is needed on mapping this early route and little reliable data exists. In comparison with present flows numbers were small as indicated by proxy figures such as the total number of international staying tourists at Kuta beach in 1973 was only around 15,000 (Picard, 1996). In comparison Yogyakarta, another early backpacker location, in the same year had around 35,000 international tourists of whom backpackers would have comprised the major proportion (Hampton, 2003). These remnants of the ‘hippy’ travelling movement (Theroux, 1975) were still occasionally seen in the mid 1980s.

The backpacker trail in the 1990s.

In the 1990s the South-East Asian backpacker trail started with the backpackers' arrival usually by air into Bangkok as a main international travel hub (Hampton, 1998; Westerhausen, 2002). See Figure 2. From there, a common land route developed to the southern Thai coastal and island destinations either on the western Andaman coast (Phuket, Koh Phi Phi and Krabi) or on the eastern coast (Koh Samui etc). From there, backpackers would travel by train, or increasingly by bus or minibus into Malaysia with Penang often being the next destination. After Penang, the route continued by ferry across the Straits of Malacca to Indonesia, then by road through Sumatra usually via Lake Toba and Bukittinggi before either travelling to Singapore, or continuing through Java via Yogyakarta to Bali and then the eastern Indonesian islands (Lombok with its famous Gili islands, Komodo for the 'dragons' and Flores). This route, and key centres along the trail, is detailed in the *Lonely Planet* guide books used by backpackers at that time. Backpackers' verbal accounts commonly mention meeting the same people in accommodation or cafes along the trail in the newly emerging backpacker enclaves or 'gathering places' (Vogt, 1976). In this period the notion of a 'holiday within a holiday' emerged and certain resorts became increasingly popular among backpackers as places to relax and stay rather than hurrying through. Such locations included Lombok's Gili islands in Indonesia, Cherating *kampung* (village) and the Cameron Highlands in peninsula Malaysia, and Koh Samui and other southern Thai islands (Hamzah, 1995). (Our questionnaire survey reinforced this, albeit for the period of the mid 2000s, showing higher average length of stay for the Perhentian islands (9.6 nights) and Tioman (7.2 nights) compared with Penang (4.4) or Kuala Lumpur (4.08) or Malacca 3.5).

[Figure 2 'Backpacker Trail 1980s - 1990']

At this point the backpacker route exited South-East Asia to Australasia. If the backpackers branched off to Singapore, a common route ran northwards through peninsula Malaysia with stays in Malacca or Tioman island, Kuala Lumpur and perhaps Cherating before moving North to Bangkok to exit the region by air.

Alternatively, some backpackers started in Singapore and their journey reversed this route. However, this common backpacker route through southern Thailand, peninsula Malaysia, Sumatra and onwards has now evolved significantly in terms of the route travelled, the modes of transport used, and its increasing commercialization as part of a wider process of institutionalization of backpacker tourism in the region.

The contemporary backpacker trail since the early 2000s.

As noted earlier we included an outline map of South-East Asia and asked respondents to draw their trip. These completed route maps were then analysed and digital maps created for each main fieldwork site. As far as the authors are aware this simple but effective form of data collection of backpacker routes has not been done before.

Changes to transport and the low cost airlines.

In terms of transportation, several aspects could be observed. First, although backpackers still tend to choose the cheapest forms of travel - which until recently was ground transport - the innovation of the LCCs began to affect travel choice and patterns. Specifically the emergence of Air Asia as an LCC from around 2000 is significant with some backpackers starting to use LCCs rather than long-distance ground transport within the region.

The LCCs' rise in Asia was driven by the vast potential domestic and regional travel market in the fast-growing economies combined with the LCCs' new business models developed by airlines such as EasyJet and Ryanair. (Air Asia's strap line on its aircraft is 'now everyone can fly'). Once the LCCs began their rapid growth in both flights and routes, some South-East Asian governments built special LCC terminals at existing air hubs (first Malaysia in 2006 next to Kuala Lumpur International Airport, then Singapore with Changi's new LCC terminal, followed by a dedicated LCC airport in Kota Kinabalu, Sabah). Although it is unlikely that the potential of the backpacker market was considered in the LCC business plans, we would expect to see increasing numbers of backpackers using LCCs in South-East Asia in the short- to medium-term. Pearce et al. (2009) note a similar process in Australia with LCCs starting to affect backpackers' travel itineraries and travel decisions.

Air Asia, for example, uses their Kuala Lumpur hub to offer cheap flights to Bali, Yogyakarta and Bandung. In addition they fly from Johor Bahru to Jakarta which offers a low cost alternative to the scheduled airlines that fly Singapore - Jakarta. One interviewee in Bali told us that he was "incredibly thankful to Air Asia as we were totally cut off!" (Guest house owner, Ubud).

Further evidence of the growing role of air transport within the region, compared to the backpackers' former reliance on ground transport, can be seen in Borneo. We found evidence of the emergence of a smaller, secondary branch that we dubbed the 'Borneo trail' (the loop between Kota Kinabalu and Kuching - by air - providing access to the ecotourism attractions). In addition, Air Asia flights from Kota Kinabalu to Bangkok allowed connection to the dynamic (and growing) Northern trail. However, this increasing reliance on the LCCs for air travel has also proved

somewhat fickle. For example, Air Asia ended their routes from Bangkok to Kota Kinabalu after only 18 months which they claimed was due to a lack of support from the tourism industry. This is not clear, however, as interview respondents from the Sabah Tourism Board informed us that in the expectation of large tourists flows they had even planned a Sabah tourism office in Khao San Road to meet the expected demand. However, the Air Asia route Bangkok- Kota Kinabalu was discontinued in 2008.

The second aspect concerns the growth of a parallel infrastructure where backpackers initially used local public buses or minibuses, but over time local entrepreneurs seeing a business opportunity would start private minibus routes specifically for backpackers. Tourists would be picked up from one enclave and driven to the next in the sole company of other backpackers. This aspect of institutionalization has been observed by researchers in Indonesia and Thailand (Riley, 1988; Hampton, 1998; Sørensen, 2003). These transport services are advertised in backpacker accommodation and other facilities. Minibuses containing backpackers would then follow the same routes as the public buses but without the frequent stops or (significantly) local passengers. One of the paper's authors observed this tension in southern Thailand in the early 1990s. Heated conversations were noted among backpackers about the relative merits of local buses verses minibuses with discussion about the 'intense' experience of local buses compared with the ease of backpacker minibuses non-stop to Penang. For some backpackers the journey itself, its length, discomfort and the anecdotes that can be told and re-told to other backpackers about the chickens taken to market on the bus etc becomes part of the 'badge of honour' (Bradt, 1995) in their narrative, distinguishing them as experienced 'travellers' rather than mere tourists (Spreitzhofer, 2002). Such constructions of self

and issues of authenticity (although these are not terms that backpackers normally use) are associated with changing typologies of the backpackers and their increasing differentiation (Noy, 2006). One respondent said:

“Five years ago when I started backpacking people watched out for each other, there was more of a community, it was nice. You’d hardly met someone for five minutes and you’d say ‘would you mind my bag while I go to the loo?’ [bathroom] Now there’s less trust among backpackers, they might steal my Lonely Planet, my iPod, stealing from other travellers - its not the locals. Now everyone comes to Thailand and Singapore, sit in the Raffles, been there.” (British female backpacker, Bangkok)

Constructions of place, memory and self.

The research found that many backpackers had a particular image of place and common perceptions of the emerging destinations such as Laos, Vietnam and Cambodia as being ‘exotic’. This was reinforced by our questionnaire data that showed a longer average length of stay for some countries on the Northern trail such as Vietnam (37.1 nights average length of stay) and Thailand (33.5 nights) compared with Malaysia (27.9 nights). (Cambodia had a lower average of 12.9 nights but has a limited number of sites and tourism started from a very low level given the damaged infrastructure and human resource limitations associated with the former Khmer Rouge regime). The common view of the ‘exotic’ new destinations was compared with what many interview respondents described as the somewhat bland image of other countries such as Malaysia in particular. One respondent memorably (but perhaps unfairly) said “Malaysia is the Belgium of South-East Asia”, in other words, a nice place to visit but not outstanding. Another commented:

“It doesn’t have an image, no image. We’d not heard of it [in Canada]. It’s similar to Indonesia with poor security, terrorism, you know. It was only when we met other backpackers that we even thought of it.” (Canadian female backpacker, Ho Chi Minh City).

This illustrates the interaction between the variables of transport links, country image, and the emerging backpacker destinations on the Northern trail. In this case, changing transport networks, specifically LCC flights to the new destinations - rather than the long overland journey - facilitated increased backpacker flows to Cambodia, Vietnam and Laos. This is further illustrated by the recent packaging of a flight itinerary by Vietnam Air that combines the pull of three iconic UNESCO World Heritage Sites in Indo-China, namely Halong Bay (Vietnam), Angkor Wat (Cambodia) and Luang Prabang (Laos). This is another example of institutionalization operating where an airline’s commercial decision to market this trip is arguably now driving the ‘choice’ of backpackers to visit these sites and follow this particular itinerary.

Competing internal routes.

The research found another significant example of growing institutionalization of backpacker tourism where new tour operators in Malaysia started selling standard itinerary tour packages to backpackers. Typically the route would be Kota Bahru-Perhentian islands-Taman Negara nature reserve - Cameron Highlands. This route could be reversed or Penang added. (Similar specialist tour operators were also observed in Bangkok’s Khao San Road offering routes around Thailand). Our respondents revealed the increasing role of one key travel firm, KB Backpackers, a

specialist firm based originally in Kota Bahru city. This illustrates the rise of corporate selection of routes compared with backpackers of the 1990s themselves choosing, and following, their own routes on public transport. In a sense this corporatization, or solidification, of the informal routes travelled by the backpackers into fixed routes offered by a tour operator (albeit a backpacker-friendly tour operator) demonstrates an important moment in the increasing formalization of backpacker tourism and its massification (Hampton, 2010).

More specifically this illustrates how the growing institutionalization of backpacker tourism is fundamentally affecting the expansion (and in some areas, decline) of backpacker routes. But this also raises concerns that possible (potential) destinations may become bypassed if they are not on the routes decided by firms like KB Backpackers. This phenomenon is already happening in the east coast of peninsular Malaysia, where nature guides based in the Gua Musang (Kelantan) area complained that KB Backpackers and similar operators only use Gua Musang town as a stopover while ferrying backpackers from the east to the west coast, despite the existence of adventure and cultural resources that used to be popular with backpackers travelling independently. This has some parallels with the well-documented role of travel intermediaries in more institutionalised markets such as the large northern European tour operators hugely influencing customer choice in southern Europe (Buhalis, 2000).

This is therefore a significant change from a more customer (or demand)-driven system by the backpackers themselves, to more supplier-driven operations as the region sees increasing commercialization and formalization of this sector. It could be argued there is also a link to changing trip durations, that is, backpackers (like flashpackers) appear to have less time, and shorter trips need more organization,

adding to the impetus of the process of wider institutionalization. Nevertheless, backpackers still do not want to travel like mainstream tourists:

“A few companies seem to have a monopoly- the hostel in KL [Kuala Lumpur] herded us onto a tour to Taman Negara [national park] and then to the Perhentians. More competition would be good.” (British female backpacker, Perhentian islands).

Ironically though, our findings suggest that this is precisely what is increasingly happening. For example, interviews in Ho Chi Minh City revealed that backpackers purchased bespoke tours sold by local companies claiming that their tours were ‘more off the beaten track than Lonely Planet’ only for the backpackers to end up on the same coach or boat tour as mainstream conventional tourists!

Another key finding from analysing the maps was that around 2006 the backpacker trail in South-East Asia appears to have diverged into two main variants, a ‘Northern’ and a ‘Southern’ trail.

[Figure 3 ‘Contemporary SE Asia Trail’]

As Figure 3 illustrates, the Southern route has changed significantly since the 1990s. Backpackers still typically arrive into Bangkok and head to the southern Thai islands and may visit Malaysia, however, unlike the 1990s, Penang is not now a major destination. Research showed that backpackers are more likely to visit the Perhentian islands, the Cameron Highlands or South to Kuala Lumpur. The Northern trail is broadly a loop comprising Bangkok to Cambodia (Siem Riep for Angkor Wat, and

Phnom Penh) then Vietnam (Ho Chi Minh City or Hanoi) and returning to Bangkok as the main air hub.

Discussion.

The research showed that, not unexpectedly, the key backpacker trails have changed significantly over time. To some extent this could be expected given the nature of backpackers who constantly seek new places and often act as pathfinders by opening new areas for later mass tourism. In terms of Butler's life cycle model (1980) backpackers tend to first appear at the 'exploration' stage. This has been observed in both eastern Indonesia and the southern Thai islands for example (Cohen, 1982; Hampton, 1998). Nevertheless, more recent models of resort development challenge this arguing that stages do not necessarily follow in sequence and that backpackers do not necessarily lead to more industrialised forms of tourism (see Brenner and Fricke, 2007 on 'developer tourists' - former backpackers who become owners and service providers for backpackers). However, it was surprising to discover the extent of the changes revealed in the South-East Asian backpacker trails in a short time. It can be argued that this can be accounted for by the increasing institutionalization of backpacker travel operating in combination with other, external factors.

One destination is illustrative of changing backpacker routes. In Penang's case it has undergone relative decline since the 1990s and was formerly the gateway to the trail's Indonesian segment. Penang's decline may be partly accounted for by three travel-related exogenous variables. These are first, Indonesia's ongoing political instability that dampened international demand including the Bali terrorist bombings (and continuing instability in southern Thailand); secondly, the 2004 Tsunami that struck North Sumatra; and thirdly, this appeared to combine with the effects of

another variable which is less significant than the first two, namely the Indonesian government's visa changes of 2004 that discouraged backpackers by introducing a visa fee for a dramatically shorted tourist visa (reduced from two months duration and free, to limiting visits to 30 days, and imposing a relatively expensive US \$25 fee with hefty over-staying penalties). In comparison, Malaysia allows tourists to stay for up to three months and there is no visa charge.

These three variables, particularly the first two, appear to have massively lowered backpacker demand to visit Sumatra from Penang. Thus Penang, through no fault of the destination, lost its role as a former key node on the 1990s backpacker trail. Interestingly, interviews both with backpackers and service providers showed that a significant number of present backpackers staying in Penang were on the so-called 'visa run' (visa renewals for Thailand) resulting from their grey (unofficial) employment across the border in Thailand, often in the scuba diving business:

“this year less business, last year come down, mostly backpackers come from Thailand for visas [go] back to work in Thailand. . . backpackers want cheap, now Indonesia changes visa, now less tourists here, they go to Thailand, Cambodia, Laos.”
(Manager, second-hand bookshop, Penang)

The backpacker centres' roles also change over time. For example Penang has changed from being primarily the gateway to Sumatra in the 1990s, to now benefiting from the 'visa run'. Arguably, for both roles, geographical location, specifically proximity, plays a part. Penang hosted backpackers in the 1990s not just for its own attractions (Chinese built heritage, local street food), but also as a stopping point en-route to the Sumatra trail. Its proximity across the Straits of Malacca and cheap local

ferries made it a logical choice of gateway. More recently, its proximity to the southern Thai border (and the existence of a Thai consulate) allowed backpackers and others on the Thai ‘visa run’ to stay there temporarily.

Fieldwork also revealed evidence of re-investment in backpacker infrastructure with some partial re-invention and recapitalization especially since Georgetown (Penang) and Malacca were jointly listed as UNESCO World Heritage Sites in 2008. Some accommodation in Georgetown was being upgraded mirroring developments in the Bukit Bintang enclave in Kuala Lumpur for the flashpacker market that has a greater profit margin than regular backpackers.

For the southern trail the LCCs’ role also appears significant, for example in Indonesia which had been a key country along the classic 1980s/1990s trail. Specifically it appears that Air Asia gave a lifeline to the Indonesian part of the trail given the ending of Garuda’s direct flights to Europe in 2005.

Research also found that backpackers’ nationality appeared to make little difference to their routes travelled or regional itineraries. However, the one major exception was the Israeli backpacker segment. We found a significant spatial clustering in Thailand and the Northern trail, particularly in Bangkok, but none in Malaysia. This is due to Malaysian government restrictions upon Israeli nationals from visiting the country.

“We bargain very hard, Thais are OK, they like Israelis. In Pi Pi [island] you can learn to dive in Hebrew, and in Koh Tao and Koh Phangan, many restaurants, Israeli tattoo parlours on Khao San Road. . .” (Israeli male backpacker, Bangkok).

Also, backpacker nationality did not seem to affect which route they followed, which appears to contradict Ryan and Gu (2007), however, we did not separate ‘ethnic group’ from ‘nationality’ on the questionnaires. Of the backpackers interviewed/ completed questionnaires, if European they were mainly Caucasian. This was not deliberate since random sampling was employed during fieldwork but reflected the small number of ethnic minorities from European countries that appeared to travel as backpackers. Although some Asian backpackers were interviewed (mainly from Singapore and Hong Kong), ethnicity as a variable affecting travel patterns requires more research.

Conclusion

This paper has argued that backpacker routes in South-East Asia have undergone significant modifications over time due to the interaction between the increasing commercialization and institutionalization of backpacker tourism since the original 1970s ‘hippy’ trail as observed by Cohen (1973) and Theroux (1975). Although Bangkok remains a major air hub and regional entry point, other established backpacker centres on the trails such as Penang in Malaysia have undergone relative decline whilst newer destinations such as Siem Riep in Cambodia have emerged. Change is to be expected and generally conforms to the dominant model within the literature of resort evolution over time (Butler, 1980). However, this paper argues that we can begin to account for the changing geographies of backpacker flows in the region by considering the role of increasing commercialization with new business development and the broader socio-economic changes driven by growing institutionalization. This appears to operate in combination with the effects of exogenous travel-related variables (Oppermann, 1995) specifically travel innovations

(LCCs, and new networks); exogenous shock (political instability and terrorism, natural disasters such as the 2004 Tsunami, volcanic eruptions etc) growing regional competition, and new entrants. Further, the paper argues that there is an increasing process of convergence between backpackers and conventional tourism.

It can be argued that the current South-East Asian backpacker trail has been shaped to some extent by the transport links (connectivity) within the region, and we concur with Lew and McKercher (2006). However, our research also showed that transport networks were augmented by the presence of highly iconic attractions acting as a pull factor for the backpackers. Bangkok was already well-established from the 1970s (Theroux, 1975; Wheeler, 1977) as a major transport hub with overland connections to Ho Chi Minh City, Phnom Penh and Siem Riep. In addition, the enclavic development of backpacker tourism around Khao San Road and the supporting infrastructure that grew specifically for backpackers all suggests that the process of institutionalization is now well-established (Noy, 2006).

This then seems to operate alongside the pull factors of regional attractions. The emerging northern region has iconic attractions - for example Angkor Wat or the Mekong Delta - that have become 'must see' attractions for backpackers. It also became clear from our research that many backpackers had perceptions of the 'exotic' northern route with exciting new destinations. This image was partially constructed informally by other backpackers, but increasingly was being manufactured by travel firms and official tourism planning and marketing.

In addition as noted earlier, the Southern trail has also undergone further modification with the establishment of minor routes. We found a network of urban enclaves, as well as rural enclaves interspersed with 'holiday within holiday' destinations. The urban enclaves (Bangkok; Georgetown, Penang; Kuala Lumpur)

function as gateways, reinforcing Spreitzhofer's findings (2002). In some cases we found increasing provision of more upmarket, capital-intensive flashpacker accommodation. In the rural enclaves, businesses only provided basic facilities but often had high quality attractions or activities such as scuba diving in the Perhentian islands and Koh Tao, or jungle or hill treks inland.

Concerning the relative positions of these three variables in relation to each other, the findings suggest that the three variables are not of equal magnitude. Regarding transport, since the early 2000s new forms of transportation now play a significant and growing role. The rise of LCCs appears increasingly important affecting destination choice, however, backpackers still (at present) mostly travel by land transportation within the region. Land transport is increasingly owned and operated by specialist backpacker travel firms who then plan routes and create networks. The trend to using private minibuses rather than public transport thus reduces backpackers' choice, and allows further formalization and the institutionalization process to continue. Changing forms of transport appear to amplify flows along existing trails and make it easier to travel and thus help increase the volume of flows along the routes to the region's northern destinations. At the same time, specialist firms help shape demand (and spatial flows). It can be suggested one of the more important changes accelerating the institutionalization of backpacker tourism is the rise of specialist tour operators offering exotic trips. In essence they are basically transport operators who take backpackers in their minivans based on commissions from mainstream transport operators. For example, we found that in Malaysia KB Backpackers' core business was actually transport and their lodge was just a transit point between enclaves.

The growing understanding of the different drivers of the changing backpacker flows will prove useful for tourism departments in Asia and elsewhere for planning and managing this growing international segment. For LDC tourism planners (assuming an interest in developing backpacker tourism) on one hand, an awareness of the role of external factors is useful. On the other hand, an awareness of the increasing institutionalization of backpacker tourism could be a ‘mixed blessing’. Whilst there might be an overall destination management argument (containment) of having clearly identifiable flows of backpackers from enclave to enclave, the rapid rise of large specialist backpacker firms could also be problematic. Having such large, highly integrated firms that control backpacker transport, accommodation and tours could mitigate against pro-poor tourism policies of encouraging small-scale tourist enterprise, could concentrate tourism in fewer destinations, and raises the possibility of oligopolistic, anti-competitive behaviour.

This paper has argued that there is growing evidence of the institutionalization of backpacker tourism in South-East Asia as exemplified by increasing spatial concentration in enclaves and commercialised flow patterns. These flows have been driven by specialist operators who connect the enclaves using efficient transportation thus assisting the institutionalization process. Arguably, despite the historical specificity of this South-East Asian case, this broader process seems to have some similarity with the highly commercialized and ‘corporatized’ backpacker segment in Australia (Peel and Steen, 2013). A comparison between major backpacker host regions would be a useful way to further test this notion.

And finally, for the backpackers themselves, it appears that their journey choices, and the possibilities of true independent or even spontaneous travel, have been largely reduced. Despite the backpackers’ common self-description of being

independent ‘travellers’ rather than institutionalized mass ‘tourists’, there is some irony that specialist operators in South-East Asia and elsewhere can proudly display signboards stating ‘as recommended in Lonely Planet’.

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Figure 1. The 1970s trail.



Figure 2. The Backpacker Trail, 1980s-1990s



Figure 3. The Contemporary South-East Asian Trail

