Backpacking and Youth Tourism Investigative Study

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List of Abbreviations and Acronyms

BP:	Backpacker
BSA:	Backpacking South Africa
DTI:	Department of Trade and Industry
HI:	Hostelling International
IP:	Importance Performance
IPA:	Importance-Performance Analysis
JMI:	Joint Marketing Initiative
SAT:	South African Tourism
SAYTC:	South African Youth Travel Confederation
SYTA:	Student and Youth Travel Association of North America
SMME:	Small Medium and Micro Enterprises
TMNP:	Table Mountain National Park
UN-WTO:	United Nations World Tourism Organisation
WYSET:	World Youth Student & Educational Travel Confederation
WYSTC:	World Youth Travel Confederation

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Backpacking and Youth Tourism Investigative Study

Executive Summary

This study was commissioned by the City of Cape Town Tourism Department with the aim of identifying prevailing trends/challenges/potentials/needs and the appropriate measures and actions to develop the backpacking and youth tourism niche sector to its full potential. The other study's goal was to develop an action plan to facilitate the department's implementation of appropriate actions, initiatives, programs and processes to unlock the potentials of this sector. The scope of the study included:

- To conduct specific backpacking and youth tourism market research
- Analysis and synthesis of challenges/constraints and potentials/opportunities of the niche sector
- Description and evaluation of facilities/enterprises, both spatially and by type
- Description of, and argument for the niche for Cape Town
- Propose guidelines, proposals and recommendations to support, facilitate and promote the niche sector
- Develop an action plan with specific actions identifying the role of partners and stakeholders
- Establishment of a technical working group and/or niche sector liaison committee
- Run workshops with the industry role players and stakeholders.

To meet these study requirements the study method was designed and conducted in several stages. First, concepts were defined and understood before proceeding with the study to ensure that there was consistency in what was being referred to as a backpacker since the term is widely used. For this study backpacker was defined, as is defined by Tourism Australia, as a traveller who spends one or more nights in backpacker/hostel accommodation while travelling in the destination. This definition ensures that overlaps between backpackers and other tourists are limited since backpackers also engage in a lot of the activities done by all the other tourists. Second, a review of secondary data and existing literature was conducted to establish trends at all levels including global, national and local. Secondary data and literature were reviewed for both the supply and demand sides, at this stage.

Third, primary data was collected, also for both the supply and demand sides to establish and confirm trends especially at the national and local levels. The target supply-side sample sizes were: 30 each of lodging providers, attractions and tour/transport operators while target sample sizes for the demand-side were as follows: 100 international and 70 domestics who had visited the destination and 50 international and 30 domestics who had not visited Cape Town, but had visited other destinations on backpacking trips. It was a great challenge to meet these targets due to several reasons including: scepticism and lack of buy-in and co-operation from industry, low response rates and incorrect e-mails in the case of demand-side interviews, among others. Some interventions had to be implemented including: use of an online survey company (Surveymonkey), use of banners and links on Backpacking South Africa site, offer of prizes for responses, and conduct several follow ups. Even after these interventions, response rates didn't improve much. As a result the study achieved the following valid supply-side responses: seven from lodging providers, three from attractions (language schools) and four from tour operators. The following valid demand-side responses were achieved: 84 international 'have-visited,' four domestic 'have-visited,' five international 'have-not-visited,' and none domestic 'have-not-visited.' As a result only descriptive analysis could be done on the rest except for the international 'have-visited' group. However, even though the response rates were lower than expected a lot of data were generated from the secondary and international 'have-visited' parts of the study to reach the required conclusions, derive substantial recommendations and develop the action plan.

Key secondary research findings

The key findings from the secondary research showed that backpacking at the global level is dominated by destinations such as Australia, Thailand and New Zealand. Globally backpackers are known to:

- ❖ Spend more and stay longer than other tourists (US$ 3 000 average spend/trip).
- ❖ Visit more exotic locations, thus pioneering new destinations and expanding the diversity and depth of the market.
- ❖ Stay longer than other types of tourists (53 nights average length of stay).
- ❖ Have high repeat visitation rates, about three times that of other tourists.
- ❖ Participate in a wider range of activities than other tourists.
- ❖ Be more resilient to negative shocks such as terrorism, natural disasters and political upheavals.
- ❖ Help reduce seasonality as they are more likely to travel out of the peak season to avoid more expensive flight tickets.
- ❖ Be obsessively concerned with money and budgeting.
- ❖ Have a preference to travel alone.
- ❖ Be highly educated.

Key secondary research findings at the national level yielded similar trends. The findings showed that backpackers to South Africa are mostly:

- ❖ From Western Europe and well travelled long haul tourists.

- Young men and women between the ages of 21 to 25 years.
- Stay longer than other types of tourists (42 days average length of stay), but stay relatively shorter in South Africa than they do in other global destinations.
- Have a budge of R10 000 or less.
- Tend to want to interact with locals.
- Prefer Cape Town followed by Kruger Park, Durban, and Port Elizabeth.
- Participate in: visiting natural sites, museums, townships and historical sites; game viewing; and clubbing

Secondary data analysis also showed that the majority of backpacking accommodation suppliers are in the Western Cape Town followed by the Eastern Cape and KwaZulu-Natal.

Key primary research findings

Primary research supply-side findings showed that backpacking service providers were overall, satisfied by the direction of business in the sector, as they stated that business had been on an increasing trend in the past five years. The following were the key findings from backpacking lodging suppliers:

- The Internet and word-of-mouth are their main advertising channels.
- Most of their business is in summer, but business is relatively high across all the other seasons (51%-75% occupancy).
- The top sources of their business are UK, Germany, domestics, USA and the Netherlands.
- Most of their visitors have short to medium length of stay at their establishments (7-14 nights).
- Europeans bring the most yield per visitor, followed by Americans and domestics.

The lodging suppliers highlighted several challenges to their business including:

- Minimal to lacking government commitment
- Lack of marketing domestic and international
- Safety and security/crime
- Lack of marketing support for SMMEs
- Skills development and training
- Lack of networking
- Negative perceptions towards backpacking
- Cape Town winter
- Public misconception of industry

The lodging suppliers also brought up a number of key areas that they view as critical to the development and promotion of the niche sector going forward. These included:

- Working on changing perceptions about the sector and improve the image
- Provide marketing support to SMMEs
- Improve safety and security
- Standardize laws and regulations
- Sector specific marketing campaigns
- Provide government assistance
- Establish skills development and training programs
- Improve communication and networking within the sector

Other suppliers including tour operators and attractions (language schools) had more or less the same challenges as those cited by lodging suppliers. One interesting result from the language schools was that there is a substantial difference in the source markets for the main stream backpackers and those that travel for educational purposes. While the main source markets for backpacking was Europe the main sources of those that travel for educational purposes such as language also included Africa, South America and Asia.

Demand-side results showed that there really are no gender differences in participation in backpacking and that backpackers are mostly young with 68% below the age of 30. Findings also showed that backpackers are relatively highly educated (50.4% with undergraduate degree and 27.3% with a postgraduate degree). However, the majority (73%) earn less than US$3 000 a month with 22% earning even less than US$1 000/month signaling that they are mostly at the early stages of their careers. Other key facts are that backpackers:

- Travel mostly motivated by their desire to explore new places (61.4%) and to learn about other places & cultures (51.1%).
- Main purpose of visit is holiday (69.3%) followed by visiting friends and family (11.4%) and volunteerism (10.2%).
- Plan their trip about three months to a year before visiting.
- Learn about Cape Town mostly from their own experiences (68%) and from friends and family (37.5%).
- Travel mostly alone (31%) and in couples (22%).
- Had visited Cape Town an average of two times within the past five years.
- Travel in the destination (Cape Town) mostly by rental car (74%) and on foot (44%).
- Mostly make use of backpacker hostels for accommodation (89%) and that cost is the main reason for choosing backpacker hostels.

- ❖ Mostly prefer to stay within the CBD (32%) and Gardens area (20%).
- ❖ Stay an average of 11 nights in Cape Town during their trip.
- ❖ Spend an average of R7 737 in Cape Town, and the highest spend being on food & beverage (R1 544).
- ❖ Visit all the major Cape Town icons such as Table Mountain (76%), V&A Waterfront 75%), Cape Point (71%) and others.
- ❖ Participate in a wide variety of activities including: shopping (68%), visiting museums and historical sites (65%), visiting natural sites (63%) and others.
- ❖ Consider other competing global destinations such as South America (7%), Australia (6%), USA (6%) and other before settling for Cape Town.
- ❖ Have poor perceptions especially on safety and security before visiting the destination, but tend to be very satisfied with the destination once they visit.
- ❖ View accommodation cost, overall cleanliness, clean beds, clean bathrooms and safety and security as problem areas in Cape Town.

Action Plan

The final stage included developing an action plan for the backpacking niche sector. Four key areas were identified after careful analysis and examination of all the findings from the study. A detailed action plan with the time frames and proposed budgets are in the document but the identified key areas include:

- ❖ Industry organisation and Government support
- ❖ Growth and Development
- ❖ Marketing
- ❖ Skills and human resources

These four key areas were further broken down into specific action items given below.

- ❖ Industry organization and Government support
    - o Establish a public-private sector backpacking working/ regulatory body (addressing zoning issues).
    - o Hold biannual BP industry networking sessions/ workshops.
    - o Establish BP specific lodging grading and certification system.

- ❖ Growth and Development
    - o Establish a BP SMME support assistance program.
    - o Develop a CoCT BP product development & growth plan.
    - o Develop higher end BP products within the CBD and other areas.

  - Enhance safety and security and effectively communicate to tourists and potential tourists of existing programs.
  - Develop and enforce environmental and sustainability plans for service providers.

- Marketing
  - Establish BP specific JMIs with other African countries.
  - In the short term focus on the already established Cape Town markets such as domestic, UK, Germany, Netherlands & USA.
  - Establish BP specific marketing program for the non-conventional Cape Town markets.
  - Develop and conduct both trade oriented and consumer oriented marketing programs. Trade programs such as Fam-trips, trade shows, tour operator and agent workshops and consumer programs such as hosting media, direct mail campaigns and consumer advertising.
  - Produce BP and youth tourism specific marketing collateral after careful review of current to avoid overlaps and incorporate a BP specific visitor information system into the current one.
  - Support the BP industries bid to host WYSTC conference in Cape Town in 2012.

- Skills and human resources
  - Participate on advisory boards of tourism departments of Cape Town's institutions of higher learning.
  - Establish internship programs.
  - Encourage on the job training programs.
  - Customise already existing programs such as SA Host to cater for BP and Youth tourism skills requirements.

Stakeholder Workshop

After the study was completed an industry stakeholder workshop was held on the 30th of June 2009 to review the findings and discuss the action plan. The result was a prioritisation of the actions in the plan. While the rest of the details of the workshop are presented in the appendices, the revised plan is shown in the Table below:

Revised Action Plan

No.	Action	Designated Organisation	Evaluation
Key Area 1: Industry Organisation and Government Support			
1	Establish a public-private sector backpacking working/ regulatory body (address zoning issues)	CoCT Tourism Department	• Success of the body • Periodic review of public-private sector relations
2	Hold biannual BP industry networking sessions/ workshops	CoCT Tourism Department	• Assessment of participation by industry stakeholders (public and private)
3	Establish a BP specific lodging grading and certification system based on a minimum standard approach	CoCT	• Constantly evaluate number of graded facilities
Key Area 2: Development and Growth			
4	Establish a BP SMME support assistance programme	CoCT Tourism Department in collaboration with marketing bodies	• Continual evaluation of BP trends and participation • Continual evaluation of SMME and niche sector growth
5	Develop a CoCT BP product development & growth plan	CoCT Tourism Department in collaboration with BP service providers	• Continuously assess and monitor BP product and experiences • Regularly update inventory • Continuously monitor progress of plan
6	Develop higher end BP products and activities within CBD and other areas	Private sector with support and encouragement from government	• Continuous assessment of product supply to ensure new products are developed and inventoried
7	Develop and support environmental and sustainability plans for service providers with incentives and award schemes	Service providers with CoCT coordinating, monitoring and providing support	• Continuous monitoring of attraction to ensure policies and plans are implements
8	Effectively communicate existing safety and security programmes to tourists, BP industry and alert responsible departments	All stakeholders, CoCT, public safety dept. CoCT tourism dept. facilitating communication and action	• Continuous monitoring of tourists and stakeholder satisfaction and perceptions • Keep track and record incidences to establish trends
Key Area 3: Marketing			
9	Establish BP specific JMI with other African countries	CoCT destination marketing body and private sector partnerships	• Destination performance research to measure flow of BP traffic in and out of destination
10	In short-term, focus on already established markets eg. domestic, UK, Germany, Netherlands and USA	CoCT destination marketing body and private sector	• Destination performance awareness research • Continual tracking and monitoring of BP performance indicators
11	Establish BP specific marketing programme for non-conventional CT markets and insert BP as a separate niche in all marketing tools Target Asian & S. American markets for language and educational tourism	CoCT destination marketing body and private sector	• Research and performance evaluation and monitoring of key indicators
12	Develop and conduct trade and consumer oriented marketing programmes eg, trade shows, tour operator and agent workshops, consumer programmes, media hosting etc.	CoCT destination marketing body	• Assess success of programmes on a regular basis • Evaluate niche sector performance through performance research

No.	Action	Designated Organisation	Evaluation
13	Produce BP and youth tourism specific marketing collateral (review first to avoid overlap) Incorporate a BP specific visitor information system into existing one	CoCT destination marketing body and private sector	• Destination performance awareness research • Continual tracking and monitoring of BP performance indicators
14	Support BP industry's bid to host international conference in Cape Town in 2012	Private sector driven with CoCT support, in discussion with CTRU due to support supplied	• Successful bid
Key Area 4: Skills and Human Resources			
15	Participate on advisory boards of tourism departments of higher learning institutions in Cape Town	All tourism stakeholders (public and private)	• Continual assessment and participation in curricular development
16	Establish internship programmes	All tourism stakeholders, CoCT can promote and coordinate	• Assess impact of internship programme on a regular basis • Assess placement rates of interns by institutions
17	Encourage on-the-job training	All tourism stakeholders (public and private)	• Continuous assessment of relevance of on-the-job training

- Red shaded rows indicate Big 5 priority areas
- Green shaded rows indicate High Priority actions

At the workshop the City also presented the achievable actions by scope of time within which the actions can be implemented. These actions by scope are presented in brief below. Again, the details are in Appendix 1 and the action plan.

Short-term Achievable

- Public-private backpacking working body (zoning)
- Industry networking sessions
- Communicate existing safety and security programmes (through CTT).
- Strengthen existing Cape Town source markets including domestic and the UK.
- Backpacking-specific marketing programme
- Specific marketing programmes at trade and consumer shows.
- Backpacking/ youth tourism specific collateral
- Support for WYSTC 2012 to prospectively be held in Cape Town and networking session at WYSTC 2009
- Participate on advisory boards
- Establish internship programmes (together with industry)
- Encourage on the job training (together with industry)

Medium-term Achievable

- CoCT backpacking product development growth plan
- Develop higher-end backpacking products and activities in the CBD
- Backpacking specific Joint Marketing Initiatives (JMIs) with other African countries

Longer-term Achievable

- Backpacking specific grading certification system
- Backpacking-specific SMME support programme
- Environmental and sustainability plans for service providers with incentives

Below were the other Key outcomes of the workshop going forward:

- The need to establish an industry liaison group between the City and the backpacking sector to ensure constant communication between the two regarding all aspects of the niche sector. Some participants were identified as the industry representatives with whom the City can communicate, and vice versa.

- The City indicated that there is budget available to assist the sector with collaborative efforts and that the sector should provide a ‘needs’ list way in advance so that there is enough time to allocate finances/ resources accordingly.

- With regards to support for WYSTC 2012 in Cape Town, the City requested a motivational proposal highlighting how the City’s support will be needed as well as the benefits of this support to the City. Since there is about three years until the conference, now would be the best time to motivate for this support.

While there was a wealth of information derived from this study, it wasn’t without limitations. Most challenges in this study were related to data collection. There was a lot of scepticism within the industry and lack of trust that resulted in unwillingness to cooperate and very poor response rates. However, the information and data that was sourced provided enough background to draw up relevant and useful conclusions and recommendations. The greatest recommendation that comes out of this study, among others, is the critical need to work on relations among all stakeholders to improve communication and most importantly, trust. There is need for consistent and seamless flow of information for decision-making, development, monitoring and evaluation among all role-players of the niche sector to ensure success. That can only be achieved through collaboration underpinned by trust and spirit of togetherness towards achieving mutual goals.

Backpacking and Youth Tourism Investigative Study

1.0 Introduction

With an estimated 160 million international tourists accounting for 20% of total global international travel, the youth travel market is becoming more lucrative and impossible to ignore. This is now a US$136 billion a year market accounting for 18% of global tourism receipts, (UNWTO, 2008). Today's youth are travelling more often, exploring more destinations, staying longer and spending more than any other tourist group. Average spend per trip increased by 40% between 2000 and 2007 to €1 915 (WYSET Confederation, 2007).

The travel and tourism industry has always been known for its resiliency to global catastrophes including epidemics such as the bird flu, climatic disasters like the Tsunami, and even terrorist attacks and threats. However, the current global economic meltdown has managed to challenge the travel and tourism industry resulting in a slow-down of international travel. According to the UN-World Tourism Organisation (UNWTO) international travel's response to the global economic crisis was drastic. Arrivals dropped by 1% in the second half of 2008 after a 5% year-on-year increase in the first half of the year. The year ended with 924 million international arrivals only 2% year-on-year increase and 7% less growth than the previous year. With this slowing down of international travel comes immense competition among destinations to attract and get tourists to their shores and even more pressure for destinations to concentrate on low cost travel visitor segments. Destinations, therefore, need to be proactive and precise in their selection and targeting of niche sectors and markets.

Backpacking is one tourism niche sector that is lucrative and competitive for destinations due to a number of reasons. It includes a diverse range of travellers, is mostly constituted by the youth who, even though they travel low cost are also relatively less price sensitive. Backpackers stay longer, therefore, spend more and they get to visit exotic and less visited places in the destination, thereby promoting geographic spread of tourism benefits. However, the diverse nature of this group requires that proper research be conducted to properly understand the particular needs, demands and travel patterns before investing heavily in its pursuit.

Australia and New Zealand have been the leading destinations with the UK and Germany being the leading origin markets. Both Australia and New Zealand have been enjoying a positive growth trend in backpacking tourism. South Africa, however, has not gone unnoticed in this regard having been ranked one of the top 20 destinations (number 16) by Lonely Planet's 2006 Travellers Pulse Survey and ranked 10th favourite destination by UK travellers. South Africa has entered the highly competitive international backpacking market which has now been acknowledged by government as an important niche market for the South African tourism economy. Cape Town is ranked the first of the top 20 backpacker ‘hot spots’ by international backpackers to South Africa (Department of Trade & Industry, 2007). Sustained growth of this niche sector, however, requires commitment and targeted strategies based on adequate knowledge and understanding of the markets and consumers from sound research.

This report covers both the desktop and primary research parts of the study showing the different trends of backpacking and youth tourism at the global, national and local levels from previous studies and secondary and primary research findings. The report covers both the supply and demand side trends of this tourism sector. Additionally, a draft action plan to grow this sector in Cape Town has been developed, drawing from both the supply and demand side trends.

2.0 Descriptions and Definitions

Backpacking has historically been used to denote a form of low-cost, independent international travel. The factors that traditionally have been used to differentiate backpacking from other forms of tourism included: use of public transport as a means of travel, preference of youth hostels to traditional hotels, length of the trip vs. conventional vacations, use of a backpack, an interest in meeting the locals as well as sight-seeing. Backpacking is a term that has also been mistakenly used to group all budget conscious and adventurous travellers. Research has shown that this is a very diverse group of travellers whose characteristics often overlap with other groups, but have key similarities including:

- A preference for budget accommodation
- An emphasis on meeting other travelers
- An independently organized and flexible travel schedule (i.e. no plan)
- Longer, rather than brief holidays
- Travel more widely
- An emphasis on informal and participatory activities.

Tourism Australia defines a backpacker as a traveller who spends one or more nights in backpacker/hostel accommodation while travelling in Australia. According to the South African Department of Trade and Industry (2007) a backpacker is visitor who stays at least one night in backpacker hostel/accommodation during their travel. Visitors do not necessarily need spend all their nights in backpacker accommodation, but may also stay in other types of accommodation.

Several other researchers have also tried to define and classify backpacker tourists. O' Reilly (2006) defined backpackers as international long-term budget travellers who were historically only youth, but have now broadened into the wider spectrum of travellers. Rogerson (2007) defined backpackers as having a preference for travelling alone, educated, middle-class, single, and obsessively concerned with budgeting.

Richards and Wilson (2003) classified backpackers as flashpackers and denture ventures or grey gapers. Flashpackers are the technologically savvy Generation Y travellers who take to the road seeking adventure, new friends, have high disposable income and demand a more upmarket travel experience. Denture ventures or grey gapers on the other hand are older backpackers usually more than 50, have high disposable income and also demand a more upmarket travel experience.

Youth tourism involves the travel of young people 30 years of age and under travelling outside the family unit, not for business, and not to primarily visit friends or relatives. Their travel usually includes at least one overnight stay (The Student and Youth Travel Association of North America (SYTA), 2003). The main features of youth tourism are: the low organisation and flexible travel arrangements, a high level of cross cultural interaction and the availability of free time. Youth tourists are also prepared to put up with a lesser degree of comfort than older travellers and normally travel alone or in a group made up of other travellers. There are several other subsectors of tourism that are closely related to backpacking and youth tourism, some of which include:

2.1 Volunteer tourism

According to Wearing (2001) volunteerism can be defined as a form of tourism that makes use of holiday-makers to fund and work on conservation projects around the world. It aims to provide sustainable alternative travel that assists in community development, scientific research or ecological restoration. Volunteer tourists seek a tourist experience that is mutually beneficial, that contributes not only to their individual development, but also positively and directly to the social, natural and economic context in which they are involved.

2.2 Education, student and language tourism

Edu-tourism refers to any program in which participants travel to a location as a group with the primary purpose of engaging in a learning experience directly related to the location. It is comprised of several sub-types including ecotourism, heritage tourism, rural/farm tourism, and student exchanges between educational institutions (Bodger, 1998). Student tourism refers to the movement of young people in higher education. This movement is a good source of income for many countries. Student tourism also refers to travel by schoolchildren, often related to learning about the history and culture of their own country (Richards, 2005). Language tourism on the other hand is comprised of programmes of study or cultural exchange for people interested in visiting other countries and in meeting local residents, with the aim of increasing their knowledge of culture and language (UNWTO, 2002). Japan is the most important source market for language schools, followed by Spain and Germany. The United Kingdom is still a major destination for language travel and new destinations are constantly developing, notably Australia.

3.0 Backpacking at the Global Level

Globally backpacking has been drawing the attention of many destinations. This has mainly been due to the fact that young people are travelling more often, exploring more destinations as they become more experience hungry, spending more during their travel and are resilient to global problems (Richards, 2007). Some destinations are more popular than others. Some of the most popular backpacker destinations include Thailand, New Zealand and Australia. However, many governments around the world have recognised the importance of backpacker tourism. Australia is well known globally as a backpacker destination due to the high preference the country has given to this niche sector. Australia has, for years now, dedicated resources to the development and marketing of the backpacking sector for several reasons including the fact that backpackers:

- Spend more and stay longer than other tourists
- Visit more exotic locations, thus pioneering new destinations and expanding the diversity and depth of the market.
- Have high repeat visitation rates, about three times that of other tourists.
- Tend to participate in a wider range of activities than other tourists.
- Are more resilient to negative shocks such as terrorism, natural disasters and political upheavals.
- Help reduce seasonality as they are more likely to travel out of the peak season to avoid more expensive flight tickets.

Research has shown that backpacking encourages pro-poor tourism because backpackers spend their money locally and not on luxury imported goods; they pioneer remote destinations helping locals to participate in mainstream tourism and they are resilient. Backpacker lodges employ local unskilled workers and they are on the cutting edge of global consciousness regarding poverty, inequality, climate change and sustainability.

3.1 Global demand-side trends

Youth and backpacking tourism has been on the rise. The youth travel industry with 106million international arrivals now accounts for over 20% of global international arrivals. This market is worth US$136 billion a year which is 18% of global international receipts (UNWTO, 2007). The growing visitor numbers and backpacker accommodation are true indicators of growing demand from this market. Frequency of travel within this group increased from 6.2 trips in five years to 7.3 trips in five years between 2002 and 2007, while 50% of youth accommodation suppliers globally increased their capacity in 2006 to accommodate the growing demand (UNWTO, 2007).

Globally, youth and backpacking tourism is well represented across all the regions of the world. Europe with 54.5% represents the single majority of this market (Richards, 2007). Figure 1 below shows the representation of this market by region. Africa represents only about 0.8% of this market globally, which is rather expected due to harder economic conditions in Africa in comparison to other world regions.

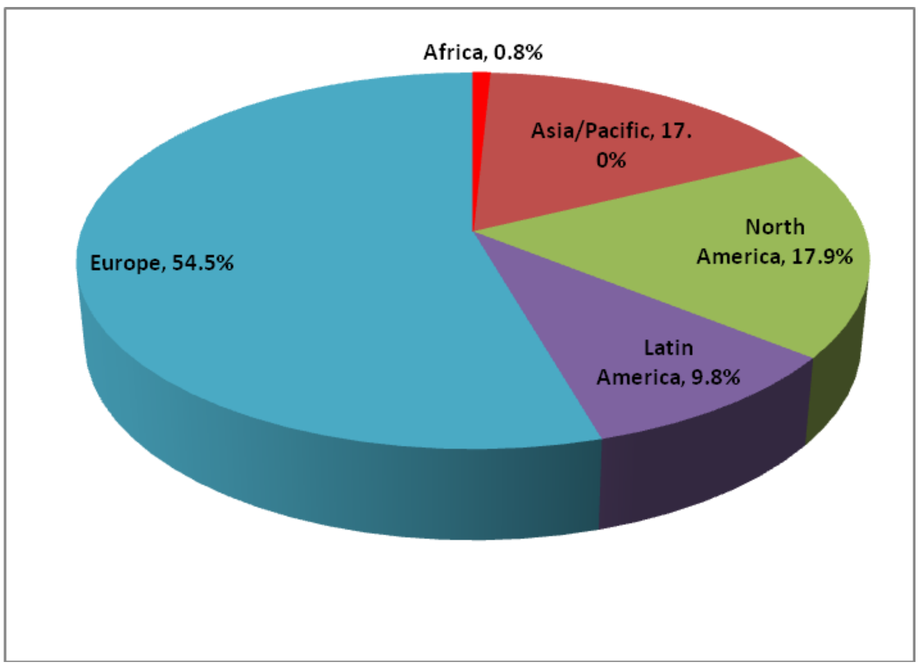


Figure 1: Distribution of international youth & backpacking tourism (Source: Richards, 2007)

3.1.1 Who is the backpacker?

The concept of backpacking has been defined and classified in several different ways by different researchers and groups. The wide range and diversity of backpackers has been a source of continuous discussion. Some researchers have classified backpackers based on their travel behaviour, some have classified them based on their underlying motive to travel, while others have classified them based on age and life stage. However, most seem to converge at some typical common features identifying backpackers as travellers who:

- are obsessively concerned with money and budgeting.
- prefer travelling alone
- are educated
- are from the middle-class
- are single

Backpackers have a preference for budget accommodation, place an emphasis on meeting other people during their travels, have an independently organised and flexible travel schedule, prefer long rather than brief holidays and place an emphasis on informal and participatory holiday activities.

Loker-Murphy (1996) identified four sub-categories of backpackers with respect to their travel motivations. These are:

- escapers/relaxers
- social/excitement seekers
- self developers, and
- achievers.

Seven other categories of youth tourists have also been identified according to their motives and experiences, including:

- Moratorium travellers, those taking the opportunity to travel before entering a career or a family life and have sufficient resources to travel comfortably.
- Ascetic travellers who abstain from comforts and pleasure, have unplanned journeys and spend very little money.
- Adventurers who test their limits but have sufficient finances and have planned their trip extensively. They are often looking for new ‘unconquered’ destinations.
- Goal-directed travellers who need a reason for their travel such as education.

- Party travellers who see the trip as a party and an opportunity to meet new people.
- Alternative travellers looking for new experiences and avoiding mainstream tourism.
- Peter Pan travellers who are older and in search of their second youth by abandoning normal life and joining young people on their travels.

Other backpacker segments based on age and life stage have been identified including:

- the traditional youth backpacker (15-25 years) who sees backpacking as a social and cultural experience,
- the transition backpacker (26-29 years)
- the contemporary backpacker (30 years or older).

As the backpacker grows older their desire and willingness to pay for privacy with regard to accommodation also increases. Other groups of backpackers that have been identified are the ‘backpacker plus’ and the ‘flashpacker.’ The ‘backpacker plus’ are older travellers who have already worked for several years, but not tied down by family responsibilities or senior work positions. The ‘flashpackers’, have high disposable income and demand more upmarket travel experiences. The ‘grey gapper’ or the ‘denture venturer’ are the older than 50 travellers.

Rogerson (2007) defines backpacking as a mindset and a way of experiencing the world not limited to one particular group. He states that backpacking is enjoyed by a variety of travellers including those who are long-term world travellers on a restricted budget; those working their way around the world; the traditionally youthful backpacker; the over 40’s with families wanting to travel in the backpacking style; those seeking confirmation of identity and those relaxing before a significant career change. Either way, one chooses to define backpacking, it is clear that there are many ways travellers can be identified as backpackers and that there is no ‘one size fit all’ definition of a backpacker. In this study a simpler definition will be adopted defining backpackers as those travellers that have spent at least one night of their trip in backpacker accommodation. Given that there is a big overlap in the kinds of activities that backpackers and traditional tourists participate in while Cape Town it is important to make that slight distinction to ensure that the backpackers are accurately identified among others.

3.1.2 Demographics of backpackers

3.1.2.1 Age

Even though the preceding section has identified different types of backpackers at different life stages, a survey conducted by the International Student Travel Confederation (2007) with backpackers from Canada, the Czech Republic, Hong Kong, Mexico, Slovenia, South Africa, Sweden and the UK, found that the majority of backpackers are students aged below 26 years. The World Tourism Organisation (WTO, 2006) states that backpackers are between the ages of 15 and 25 usually from Western countries. They are more likely to be students, with formal education completed at high school and university levels. In less developed countries, younger people are more likely to join the workforce in order to survive and don't have the means to travel (refer to Figure 1, for African representation). The Lonely Planet's 2006 Pulse Survey showed that the majority of these travellers are young between the ages of 18 and 34, and about 10% between the ages of 35-44 (Figure 2). This finding seems to corroborate the importance of the age factor in backpacking tourism. However, it doesn't invalidate other categories as the same study also showed that about 7% were between the ages of 45 and 54.

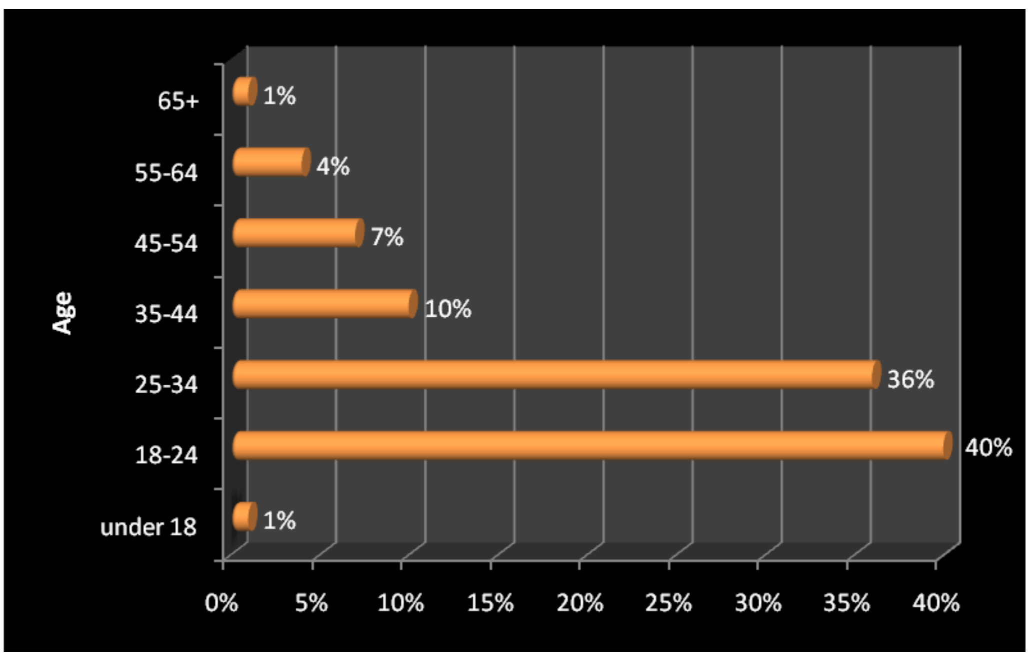


Figure 2: Traveller age (Source: Lonely Planet, 2006)

3.1.2.2 Education and income

The same study by the International Student Travel Confederation (2007) showed that backpackers have high education levels, but with lower incomes (51% earn less than US $5,000 per annum). The students are prepared to save and/or work during their travels to increase their spending power, (Richards, & Wilson, 2003). About 60% of these travellers have bachelor's degree and 20% with postgraduate degree (Figure 3).

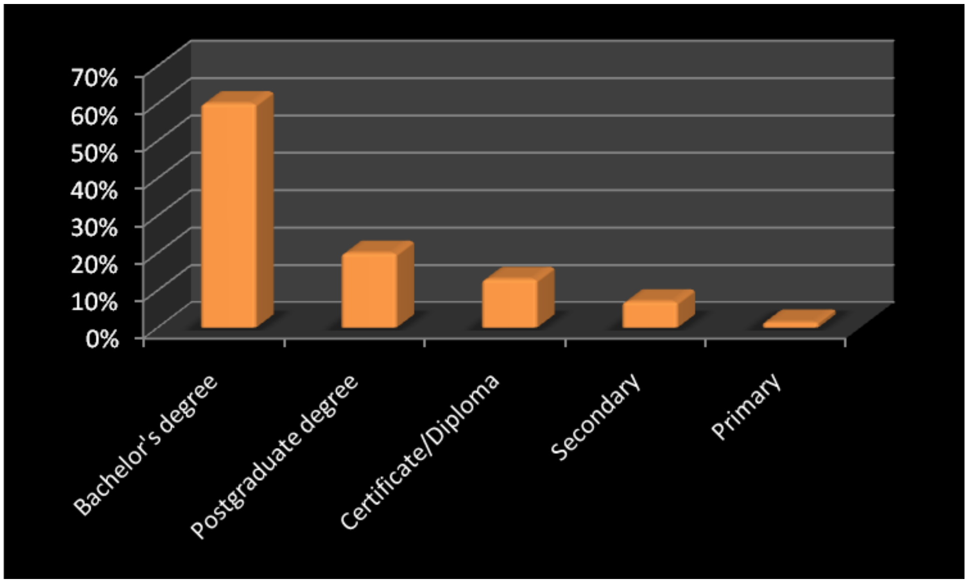


Figure 3: Backpacker educational qualifications (Source: Richards, 2007)

Backpackers' income ranges from as little as less than US$ 1 000 to over US$20 000 per annum (WYSE Confederation, 2007). The single largest group was that below US$ 1 000 (Figure 4). The fact that backpackers are highly educated, but low income suggests that they are still at the early stages of the professional lives and/or that they are taking a break between their academic and professional life, therefore, don't have stable income as yet.

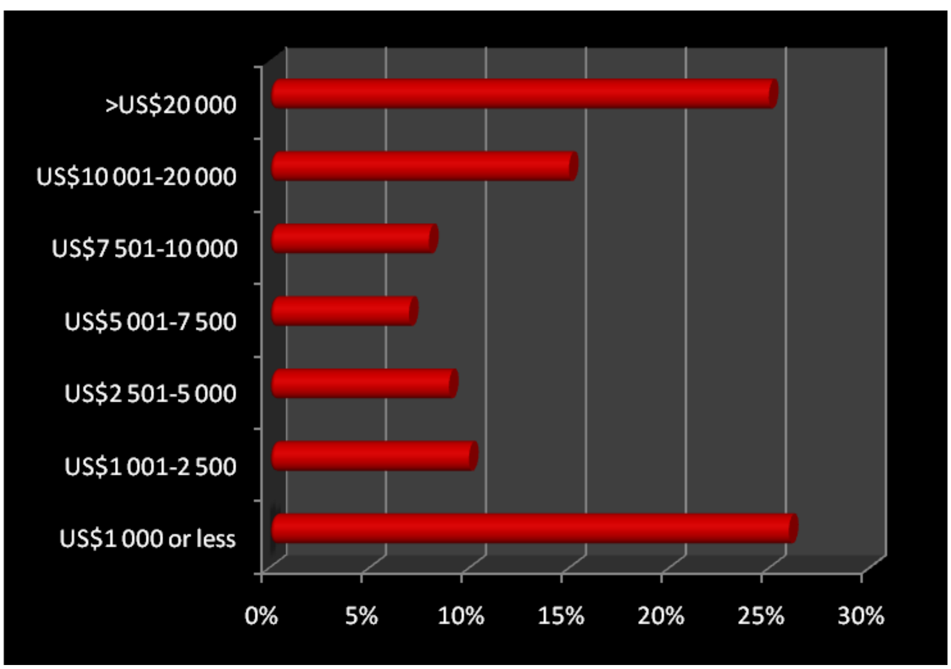


Figure 4: Backpacker & Youth tourists' income ranges (Source: WYSET Confederation, 2007)

Many backpackers are at a crossroads in their life. They either have recently graduated, just married or divorced or are in between jobs. The aim of their travels is normally to go beyond normal life while they have the chance. They spend most of their time travelling with other backpackers in impromptu groups formed along the journey (Rogerson, 2007).

3.1.3 Length of stay

On average backpackers stay in a destination considerably longer than the regular tourists. Even though they are budget travellers, their overall spend often matches or even exceeds those of regular tourists, mostly due to their longer length of stay. The average length of stay was about 53 days in 2007 down from 63 days in 2002 (Richards, 2007). However this is still far much higher than the two weeks for traditional tourists. Backpacker length of stay varies across countries as programs differ by country. For example Australia tends to enjoy longer than usual length of stay (73 nights) probably due to its holiday work visa program. The WYSE Confederation 2007 study showed that while African youth and backpackers represent only a small proportion of the global market they do stay the longest when they do visit (refer to Table 1).

Table 1: Trip length by region of origin

Origin Region	Average length of Stay (days)
Africa	68
Asia/Pacific	55
North America	56
Latin America	47
Europe	53
All	53

(Source: WYSET, 2007)

3.1.4 Spend

WYSE Travel Confederation and the United Nations World Tourism Organisation (UNWTO) in their Youth Travel Matters report (2008) state that the young independent traveller in 2007 would have an average spend on their main trip of US$ 3 000. North Americans tend to spend the most (US$ 3 300) per trip followed by Latin Americans (US$ 2 300). Europeans spend about US$2400 per trip, but generate the most overall spend as they tend to travel most often (an average of six longer than 7-day trips in five years) compared to those from other world regions.
For work experience travellers, the average length of a trip is seven months and the average total budget is almost US$ 4 800 (including travel and expenditure at the destination). Of this 40% is earned while working in the destination. Over 60% of work experience travellers decide to work abroad based on information from friends (WYSE Travel Confederation, 2008).

3.1.5 Mode of transport

Overall, the main mode of transport used by backpackers to reach their destination is air. Once in the destination, however, younger backpackers tend to make use of more rail and coach networks, while the older segment is more likely to use tour busses. The most commonly used mode of long distance transport within the destination between major cities is bus (62.6%), followed by car (45%), rail (42.5%) and Air (32.5%) (Richards, 2007). Those under 26 are more likely to travel by train, rail, coach or tour bus, use their own car or hitchhike while those over 26 are more likely to make use of air travel. European backpackers from travelling within Europe, use less of less air transportation as there are various other modes of transport for travelling in within the region. Other transport modes used by backpackers within the destination are walking, tram, metro or local busses, motorcycles and bicycles.

3.1.6 Purpose of visit and travel motivators

Holiday is the most commonly listed main purpose of visit with close to 80% of travellers travelling for holiday purposes (Lonely Planet, 2006). Visiting friends and family is also important with about 40% of travellers sighting it as the main purpose of travel. Friends and relatives play an important role as they provide backpackers with accommodation at the destination. Other important main purposes of travel include: taking career break (33%), to relax (32%) and others (refer to Figure 5).

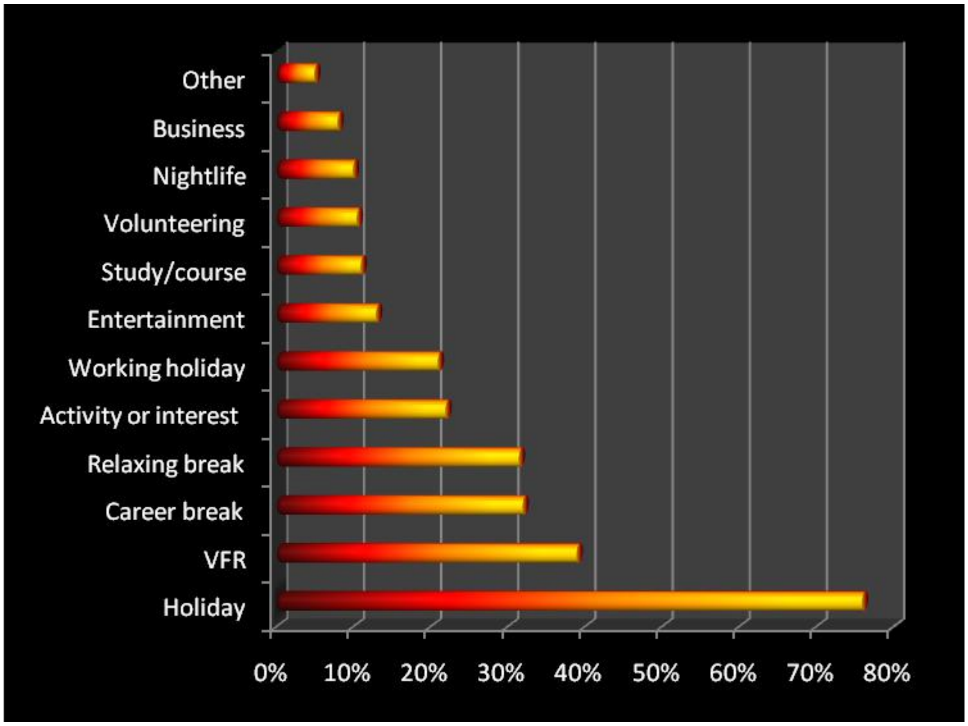


Figure 5: Main purpose of visit (Source: Lonely Planet, 2006)

The underlying travel motivations, however, reveal a completely different scenario. While most travellers' main purpose of visit is holiday, the most common underlying motivation is to explore other cultures, (Lonely Planet, 2006). Understanding the underlying motivating factors for travel is of critical importance when trying as it touches the core of why one decides to visit in the first place. Those destinations that touch this core beat the competition as tourists settle for those destinations they feel will address their underlying desire to travel and fully satisfy their core needs. Interestingly, while VFR comes second with regards to main purpose of travel, it doesn't appear on the 'underlying motivating factors to travel' list. Increasing one's knowledge (84%) comes second followed by experiencing everyday life in another country and others (refer to figure 6). This discrepancy in purpose and motivation to travel should signal to destination marketers the critical need to fully understand exactly why people travel and choose certain destinations, without which they continue losing them to those who understand.

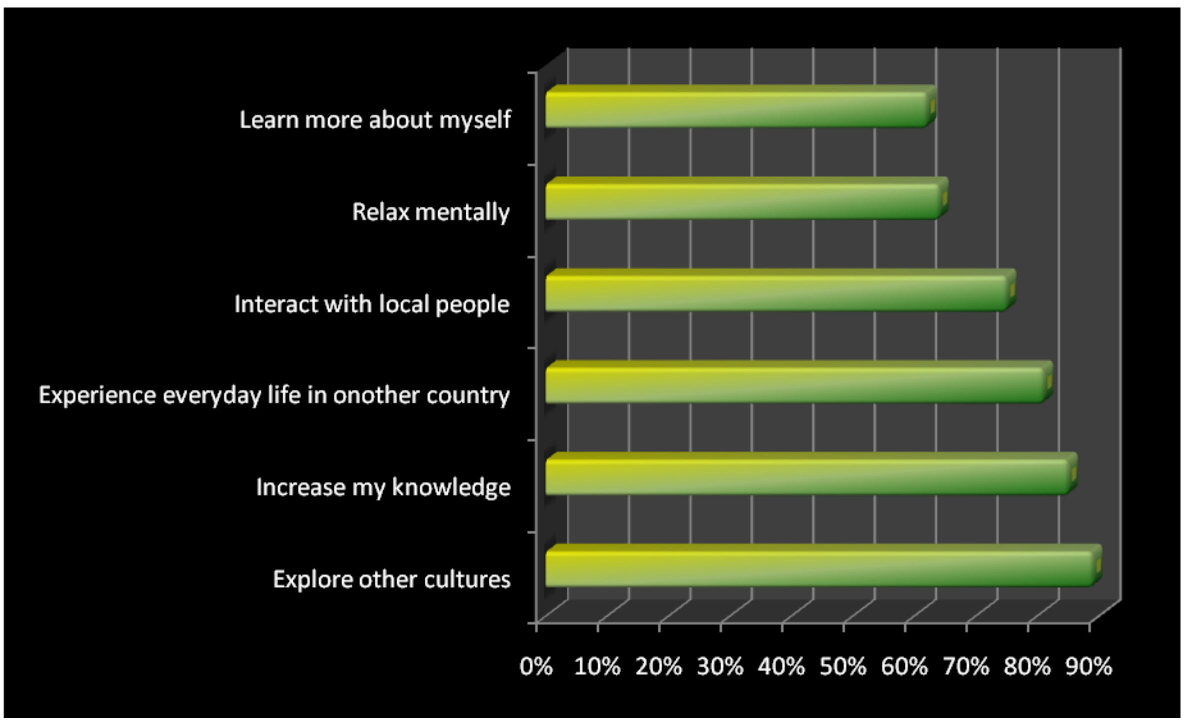


Figure 6: Backpacker Travel Motives (Source: Jones, 2008 (WYSET Confederation))

3.1.7 Accommodation use

Global demand for and the choice of accommodation by backpackers is closely related to their motivation for travel. For example, those staying in backpacker hostels are more likely looking for excitement, adventure and a social holiday while those making use of hotels are more likely to be looking for rest, relaxation and a calm atmosphere (Richards, & Wilson, 2003). The most common form of accommodation used is hotels, followed by hostels and family and friends (Staywyse, 2007). Establishments which are used less frequently by backpackers include guesthouses, bed and breakfasts, self catering establishments, camp sites and campervans (Figure 7).

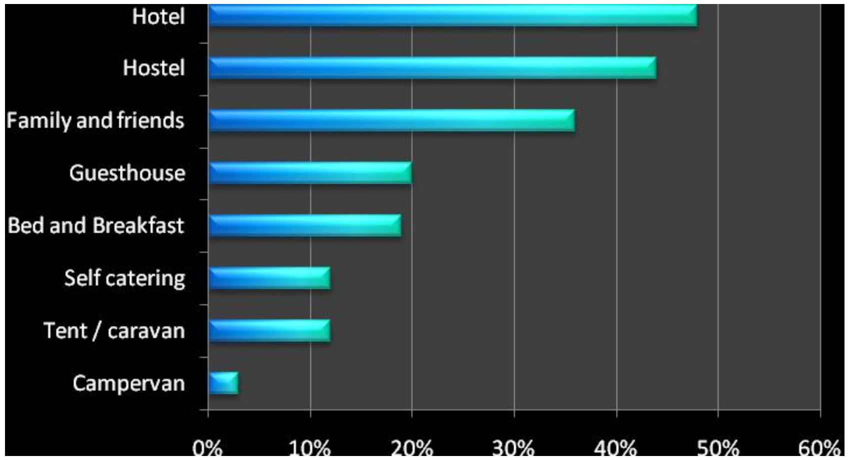


Figure 7: Accommodation use (Source: Staywyse, 2007)

Global demand for backpacker hostel accommodation varies by region. The choice of accommodation depends on the destination and the availability of different forms of accommodation. Figure 8 below illustrates backpacker hostel use by world region. The Australia/Oceania region has the highest demand for hostel accommodation followed by South East Asia and Southern and Central Africa. The high demand in Australasia could be partly due to the popularity of Australia as a backpacker destination.

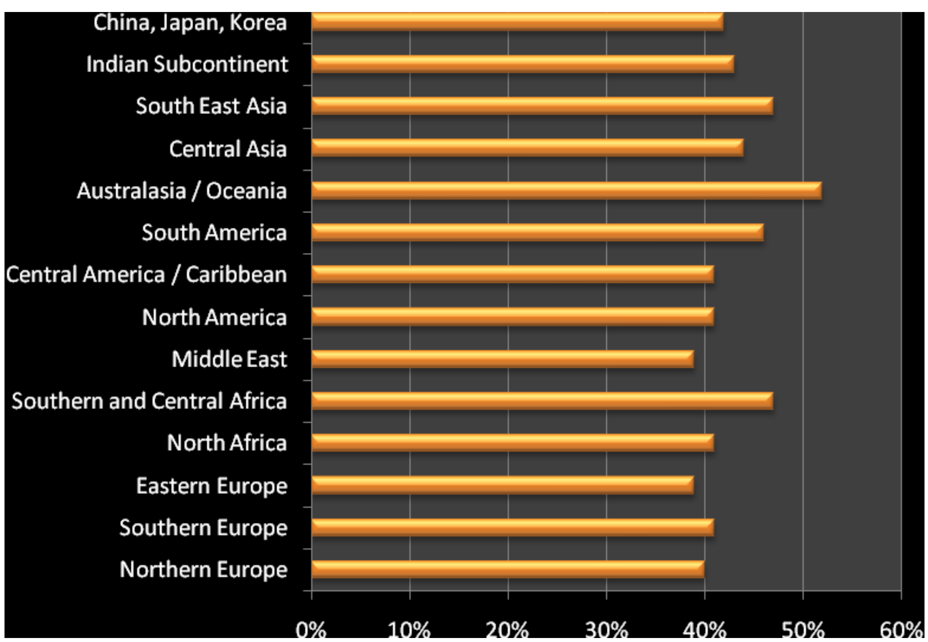


Figure 8: Backpacker hostel use by world region (Source: Staywyse, 2007)

Hostels tend to be chosen by backpackers largely based on their location and price. Brand reputation and online book ability are seen as the least important factors when selecting a hostel (Staywyse, 2005).

Table 2: Global backpacker accommodation choice factors

Factor	% rating very important
Location	52
Cost	45
No curfew / rules	25
Independent quality rating	23
Ability to book online	20
Brand reputation	12

(Source: Staywyse, 2007)

3.1.7.1 Recent backpacker accommodation developments

There has been a dramatic increase in the quality and professionalism in youth travel accommodation due to new markets and peer-to-peer reviews conducted online. Most youth travel accommodation providers are investing in increasing their capacity and improving facilities. The industry turnover is expected to rise (WYSE Travel Confederation, 2008).

Backpackers with a greater disposable income are having a significant impact on the accommodation sector. Youth hostels are revamping their facilities in order to meet the needs of this more up-market backpacker segment. Up-market hostels now have free WiFi, rainfall showers and rooftop bars, to mention some. Technology is also becoming increasingly important as youth tourists now generally travel with Laptops, iPods and MP3 players (WYSE Travel Confederation, 2008). Higher quality establishments seem to have higher profitability as they can charge higher rates. It has been established that there is a direct relationship between hostel rating and profitability. Establishment profitability increases with high hostel ratings. Figure 9 below illustrates this relationship between hostel rating and profitability. This trend also illustrates that there is an increasing demand for more upmarket accommodation facilities from backpackers.

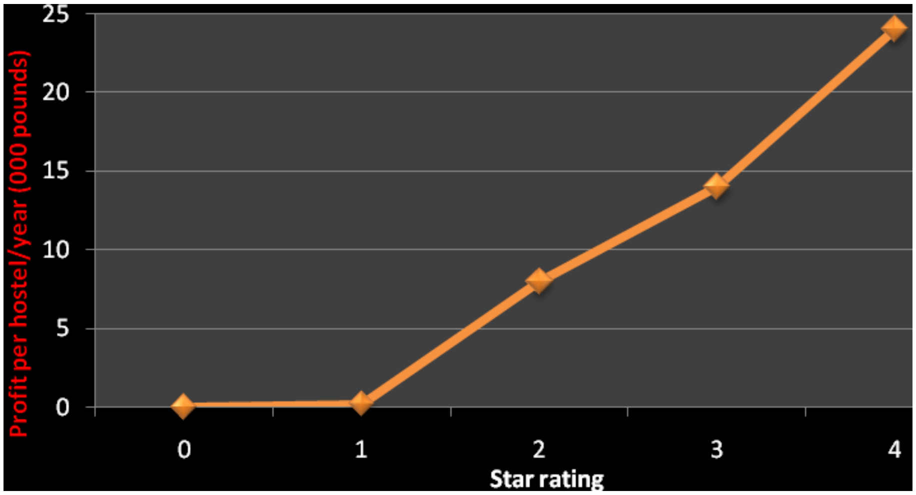


Figure 9: Relationship between hostel rating and profitability (Source: Staywyse, 2007)

3.1.7.2 Hostel users sources of information

The above rating-profitability relationship of backpacker hostels could partly be related to the main sources of information of the users. With the current growth of internet use especially among the youth, it has become quite easy and common practise for travellers to check out ratings of service providers and suppliers from previous users and those with experience before making commitments. Research has shown that when looking for a hostel to stay in, backpackers mostly use the web among a number of other information sources (refer to Figure 10). Other important information sources include guidebooks and word-of-mouth.

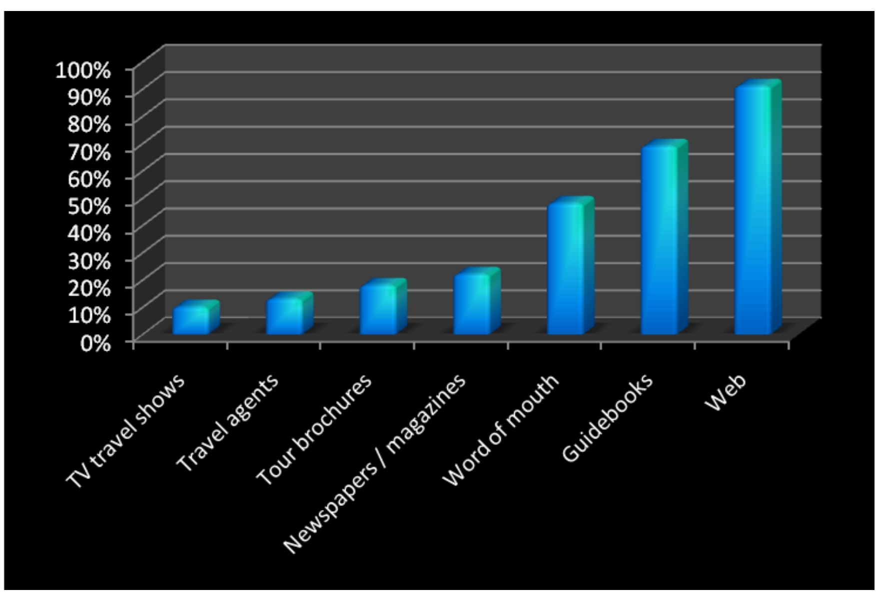


Figure 10: Hostel users' information sources (Source: Staywyse, 2007)

3.2 Global supply-side trends

There is an abundant supply of backpacking products and services at the global level ranging from different competing destinations, to travel insurance companies, travel agents and transport suppliers, accommodation providers, youth and backpacker supplies retailers and many others. While there is an abundance of a variety of backpacker services suppliers globally, the most distinguishing are accommodation and the destinations themselves. With regards to accommodation suppliers there are numerous of such across the globe most of which belong to and are represented by different organisations. One of the largest backpacker accommodation organisations is Hostelling International (HI) to which a lot of hostel operators belong including 90 Youth Hostel Associations in over 80 countries, operating over 4,000 hostels (HI, 2009). Others include Hostelworld, representing hostels in over 170 countries around the world and the most recent Stay Wyse non-profit global youth accommodation organisation. The international backpacking industry has experienced rapid growth in recent times, mainly the accommodation and travel and tour products and services (Rogerson, 2007). In economically unstable times such as these backpacker numbers remain resilient and are less affected then other market segments.

Regarding backpacker destinations, there is growing competition with increasing recognition of the importance of youth and backpacking tourism. While the traditional backpacker destinations such as Australia and New Zealand remain popular, there are other emerging competing destinations including Thailand and India, to mention some. The young and new backpackers usually start with well developed and tested destinations such as Australia and Europe while more experienced backpackers are more adventurous and try out new destinations. In 2007 destinations that did well with experienced travellers included Vietnam, Morocco, South Africa and Argentina (Richards, 2007). Overall, the most popular destinations are Australia, New Zealand and Thailand, but popularity varies with origin country of visitor (Lonely Planet, 2006). In the Lonely Planet 2006 Pulse survey South Africa ranked 16th most popular destination overall, but ranked higher (10th) with UK Travellers (Table 3). Given the diverse nature of the backpacker market the important fact for destinations, therefore, is to know and understand their particular market and go for it. There are some destinations that are popular in all markets including Australia, Thailand, New Zealand and Italy and others that are popular only in one market such as South Africa (in UK) and Japan (in Australia). It is interesting that Australians prefer their destination the most while UK travellers don't have their own country as one of their top ten favourite destinations to visit. South Africa is the only African country to appear on the top ten favourite destinations list of any of these major generating countries.

Table 3: Top 10 favourite country to visit by country of origin

Rank	Australia	UK	USA
1	Australia	Australia	Italy
2	Italy	Thailand	Australia
3	Thailand	New Zealand	France
4	France	USA	UK
5	New Zealand	Italy	Thailand
6	Canada	India	Spain
7	UK	Spain	USA
8	USA	France	New Zealand
9	Spain	Canada	Mexico
10	Japan	South Africa	India

(Source: Lonely Planet, 2006)

Given the wide range of the global backpacking suppliers, these can be better understood by looking at a case study of a successful backpacker destination. Since Australia has been the champion of backpacking tourism this section will be covered by looking at trends in Australia as the major global backpacking tourism product and experience supplier.

3.2.1 The Case for Australia as a backpacking destination

Tourism Research Australia (2008) defines a backpacker as ‘a visitor who stayed at least one night in a backpacker/hostel accommodation during travel to Australia’ or ‘a traveller aged 15 years or above who spend one or more nights in backpacker/hostel accommodation during travel in Australia’. The five different segments of backpackers which they have identified include:

- The working holiday maker who is an individual backpacker (mostly from the UK), that is granted a 12 month work visa.
- The free independent traveller, covering a wider range of ages and couples, including people who are backpacking for social reasons.
- The domestic backpacker, a substantial market that is expected to grow because of low costs.
- The Asian sector which includes travellers from Japan and Korea, a segment with major growth potential.
- Students or young people travelling to study.

These segments can be further divided into those seeking fun in the sun, conventional Japanese travellers, balanced good timers, tribal travellers, aspiring explorers, discerning discoverers and real explorers.

3.2.1.1 Demand-side trends

Demand for the Australian backpacking product has been on the rise recently in line with the increasing global trend in youth travel. Backpacking is the best performing tourism niche sector of Australia. Demand trends of the Australian backpacking sector are discussed in this section starting with visitor volumes, followed by accommodation demand, spend and other visitor patterns.

Recent visitor trends-Visitor numbers

International backpacker arrivals have been increasing since 2000 by an average annual rate of 3% to reach 566 000 visitors in 2007 (Tourism Research Australia, 2008). This is higher than the overall growth rate of international visitors to the country. However, there was a slight year-on-year decrease (-1.2%) in international backpacker visitors in 2008 (Figure 11). Domestic backpacker arrivals have been less predictable as there have been large year on year fluctuations. However, the average length of stay has decreased since 2000. Overall, Australia received 5. 2 million international visitors in 2008 of which 11% were backpackers.

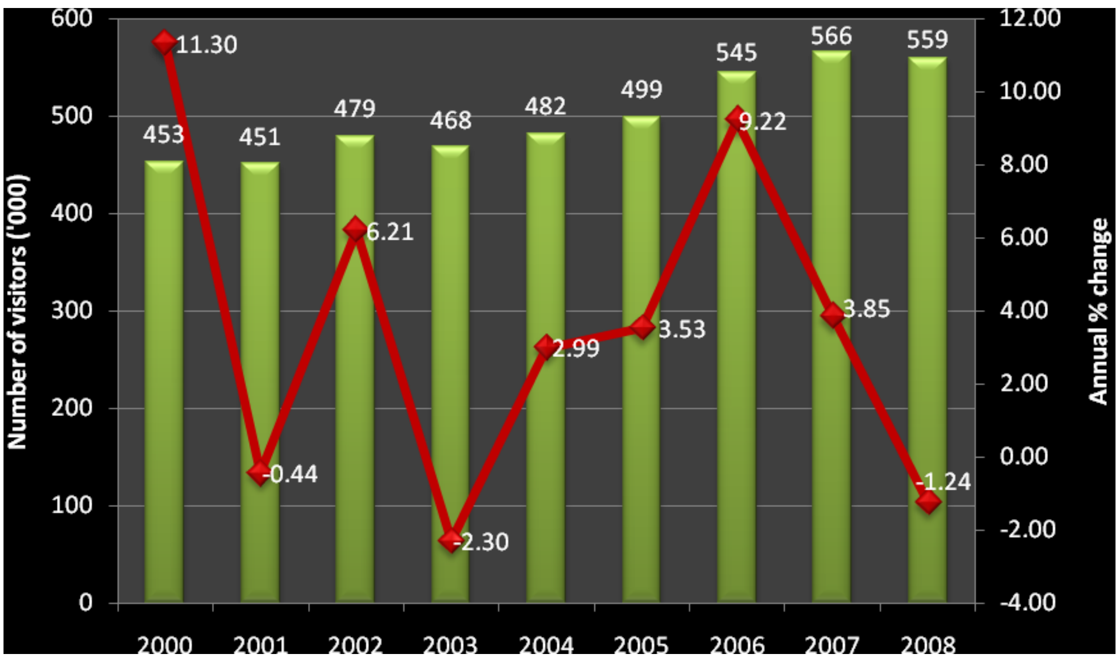


Figure 11: 2004-2008 Backpacker international visitors to Australia (Source: Tourism Australia, 2008)

International nights spent in Australia have also increased at a rate of 2% since 2000. Backpackers accounted for 40.8 million out of a total 167.8 million visitor nights in 2008. The top most contributing source markets were the UK, Germany, USA, Korea and others (refer to Table 4 below). There are several important points for Cape Town that emerge from the Australian source markets data:

- First, it is clear that Australian main international backpacker source markets coincide with the major overall international source markets for Cape Town namely the UK, Germany and the USA.

- From the rankings it can be seen that those source markets that contribute the highest visitation numbers don't necessarily also contribute the highest bed-nights and spend. While the UK consistently ranks first, the same can't be said for the others. For example Korea ranks sixth in numbers, but fourth in nights and fifth in total spend, implying that Korean are fewer in numbers, but stay longer and spend more. The USA ranks fourth in visitor numbers, but sixth in nights meaning they visit in larger numbers, stay shorter, but still spend more as they maintained the same (4^{th}) rank on spend. Also, New Zealand ranks fifth in visitor numbers, but 10^{th} on both bed-nights and spend implying that they have high volume, but bring less value per visitor as they stay shorter (an average 25 nights compared to an overall average of 72 nights), therefore spend less.

- It can be concluded that some markets bring more value per visitor than others, and it is up to the destination to decide which markets to pursue. Higher value visitors are usually better as they bring the same if not better financial benefits to the destination, but with less negative (especially environmental) impacts.

Table 4: 2008 Top ten backpacker source markets for Australia

Origin Country	Visitors		Total nights in Australia		Total spend in Australia	
	Number '000	Rank	Nights '000	Rank	Spend (Au$ million)	Rank
UK	114	1	7 129	1	581	1
Germany	53	2	4 147	3	292	3
Other Europe	52	3	4 471	2	379	2
USA	47	4	2 379	6	234	4
New Zealand	37	5	940	10	85	10
Korea	29	6	3 635	4	225	5
Scandinavia	29	6	1 910	9	167	6
Japan	28	8	2 647	5	157	7
France	27	9	2 319	7	149	9
Canada	26	10	1 969	8	152	8

(Source: Tourism Australia, 2008)

Backpackers from Korea and New Zealand have had the strongest growth since 2000, both increasing at an average annual rate of 11%. Overall, there has been robust growth in backpacker numbers from Asia as can be seen that two of the top ten source markets (Korea & Japan) are Asian countries.

There, has been growth in domestic backpacker visitors, but not as consistently as the growth in international backpackers. Figure 12 below shows the inconsistent growth pattern of domestic backpacker tourism in Australia. Growth has been recorded more in the domestic backpacker visitors in the 40-49 age groups since 2000. However, domestic backpackers spending patterns are just the same as those for non-backpacker visitors, as illustrated in Table 5 below (Tourism Australia, 2008).

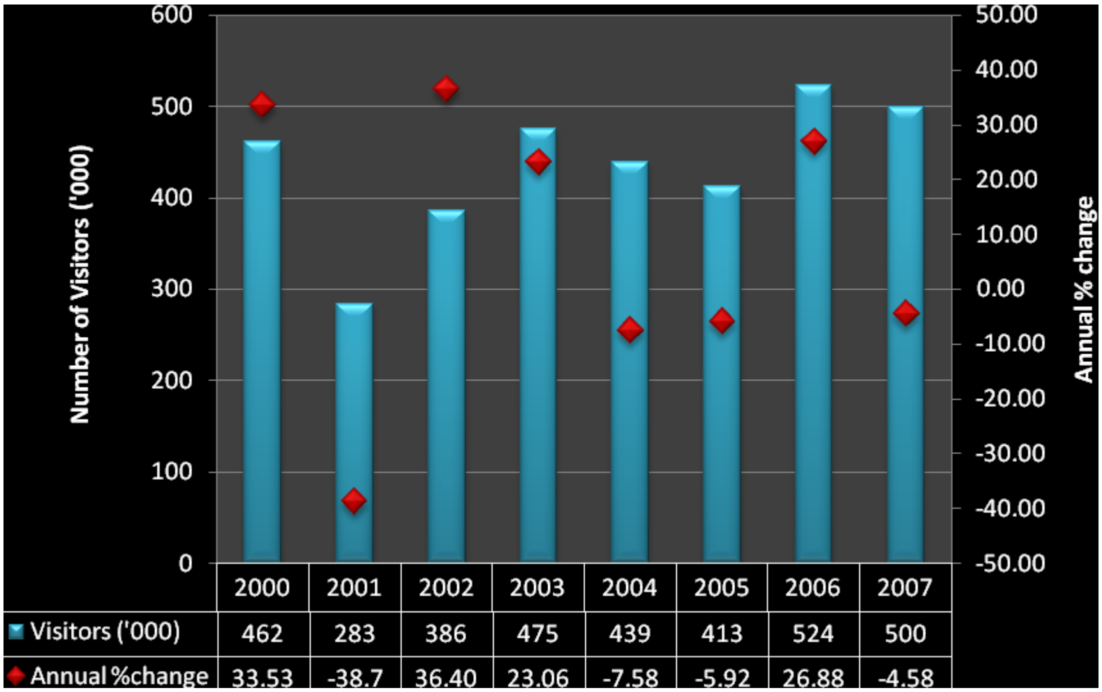


Figure 12: 2004-2007 Backpacker domestic visitors in Australia (Source: Tourism Australia, 2008)

Backpacking accommodation demand

Apart from the visitor numbers themselves, there is no other better indication of demand for backpacking services than demand trends for backpacking and youth accommodation. While there has been a growing trend in use of upmarket accommodation due to changing demographics of backpackers, backpacking accommodation use still remains an accurate indicator for demand as there is great overlap between different kinds of tourists when it comes to other accommodation types.

Backpacker accommodation demand has been increasing in Australia as shown by rising numbers of guest nights, rising occupancy rates and receipts and rising employment within the backpacking accommodation sector. Guest nights increased by 22% from 7.15 million in 2002 to 8.73 million in 2008, while the number of people employed and receipts from backpacking accommodation each increased by 16% and 66% respectively during the same period (Tourism Australia, 2003 & 2007). These trends are illustrated in Table 5 below.

Table 5: Backpacking accommodation demand indicators-Australia

Item/Year	2000	2003	2005	2006	2007	2006/2007 %change
Guest nights (million)	7.15	8.26	8.31	8.54	8.73	2.2
% Bed Occupancy	49	46.4	47.8	49.7	51.2	3.0
Receipts from accommodation (Aus $million)	130.9	175.9	192.3	203.4	218.4	7.4
Number of people employed	2 972	3 506	3 337	3 271	3 449	5.4

(Source: Tourism Research Australia, 2008)

How much do they spend?

The following Table 6 illustrates 2007 expenditure patterns by backpacker visitors in Australia. As can be seen international backpackers spend more per category than other tourists. However, the same can’t be said for domestic backpackers. Domestic backpacker spending is the same as that of the traditional tourists. International backpackers spend almost twice as much on accommodation as the other tourists, about five times as much on domestic airfare, about five times as much on organised tours and three times as much on entertainment. Backpackers travel more out into the regions than regular tourists explaining the higher airfare and other transport costs in comparison to traditional tourists. However, the total spend of backpackers ends up less than that of traditional tourists because of the higher total volume of traditional tourists in comparison to that of backpackers. It can therefore, be concluded that international backpackers are higher value tourists than traditional tourists as they bring more to the destination per arrival.

Table 6: 2007 Expenditures by backpacker visitors in Australia by category of spending

Expenditure Item	International (Aus$)		Domestic (Aus$)	
	Backpacker	Other	Backpacker	Other
Accommodation, food and beverages	2 592	1 147	389	295
Shopping	458	403	68	62
Domestic airfares	208	43	119	71
Other transport	525	201	117	93
Organised tours	469	88	-	-
Education	680	463	-	-
Entertainment	149	56	35	15
Other	289	159	104	51
Total per visitor	5 371	2 259	831	588
Total expenditure (Aus $ million)	**3 039**	**11 852**	**415**	**43 130**

(Source: Tourism Research Australia, 2008)

Age profile

The age profile has been changing over the past few years. Previously the domestic backpacker market was largely comprised of visitors between the ages of 20 and 29. However, there recently has been a growth in older aged backpackers between the ages of 40 and 49. This older age group now represents 12% (62 000 visitors) of all backpacker visitors. There also has been a shift towards older groups with international backpackers. However the majority (79%) of international backpackers still fall within the ages of 20 and 49 years.

What do they do?

International backpackers participate in more activities than non-backpackers. This is expected due to the much higher average length of stay compared to other international visitors. International backpacker visitors are more likely to engage in active outdoor/sports activities and arts/heritage activities than non-backpacker visitors.

Domestic backpackers participate more in social (88%) and outdoor/nature (52%) activities than any other activity type. Eating out at restaurants, general sight-seeing and going to pubs, clubs and discos were the most popular activities among domestic backpacker visitors (Table 7).

Table 7: The top ten activities enjoyed by backpackers in Australia

Rank	International backpackers		Domestic backpackers	
	Activity	%	Activity	%
1	Go shopping for pleasure	84	Eat out/restaurants	59
2	Go to the beach (swimming, surfing, diving)	81	Walk or drive around/general sightseeing	48
3	Pubs, clubs, discos etc	76	Pubs, clubs, discos etc.	43
4	Visit national parks/state parks	69	Go shopping for pleasure	33
5	Go to markets	68	Go to the beach (swimming, surfing, diving)	32
6	Visit botanical/public	63	Visit friends and relatives	25
7	Visit wildlife parks/zoos/aquarium	61	Visit national parks or state parks	21
8	Visit museums or art galleries	53	Bushwalking or rainforest walks	20
9	Visit history/heritage buildings/sites/monuments	52	Other activities	16
10	Go on guided tours	52	Picnics or BBQ	14

(Source: Tourism Research Australia, 2004)

Where do they go?

Three quarters of international backpackers disperse into regional areas of Australia. In 2007 international backpackers spent 34% of their total nights in regional Australia. They were also more likely to stay in regional backpacker accommodation with 41% of all backpacker accommodation nights spent in regional areas. The most popular backpacker regions/territories are New South Wales, Queensland, Victoria, Northern Territory and Western Australia in that order. However, outside of capital cities, coastal areas such as Tropical North Queensland and Hervey Bay/Maryborough (Queensland) are the most popular regions for international backpacker visitors (Tourism Research Australia, 2008).

Where do they stay?

Domestic backpackers were more likely to spend all of their nights in backpacker accommodation (76%), compared 23% for international backpackers. However, domestic backpackers also stayed in other accommodation types, including friend's or relative's property, caravan parks or camping grounds. International backpackers also chose to stay in rented houses, apartments, units or flats (28%) and homes of friends and relatives (12%).

Why do they travel?

Backpacker visitors are more likely to travel for the purpose of holiday than non-backpacker visitors. In 2007, 93% of international backpacker visitors travelled for holiday compared to 54% of other international visitors. Backpackers travelling for the purpose of employment and business have experienced strong growth since 2001, increasing by 20% and 12% respectively. Domestic backpacker visitors also travel mostly for holiday purposes (75% in 2007).

3.2.1.2 Supply-side trends

Australia has been in the backpacking business for a while and it leads in terms of recognition as a global backpacker destination. Therefore, it has a well developed backpacking tourism system with a variety of destinations, activities, and accommodation and other services. Since backpacking accommodation is the most distinguishing feature of backpackers from other tourists, it is the supply sector that will be looked at mainly in this section. With other services, there are overlaps between backpacking and traditional visitors' demand that isolating backpacking effect on the supply trends gets complicated.

Australia experienced growth in backpacking accommodation supply between 2000 and 2003. Bed-space increased by 20% between 2000 and 2003. However, backpacking accommodation supply has been decreasing from 2005 to 2007, but occupancy rates and number of employees increased during the same time. Table 8 below shows backpacking supply trends between the period of 2000 to 2007, including number of establishments, number of people employed in the backpacking accommodation establishments and available bed spaces.

Table 8: 2000-2007 Australia backpacking accommodation supply & demand

Item/Year	2000	2003	2005	2006	2007
Number of establishments*	466	494	456	429	424
Number of persons employed*	2 972	3 506	3 337	3 271	3 449
Bed spaces*	40 659	48 588	48 000	47 000	47 000
Guest nights (million)	7.15	8.26	8.31	8.54	8.73
Bed occupancy (%)	49	46.4	47.8	49.7	51.2

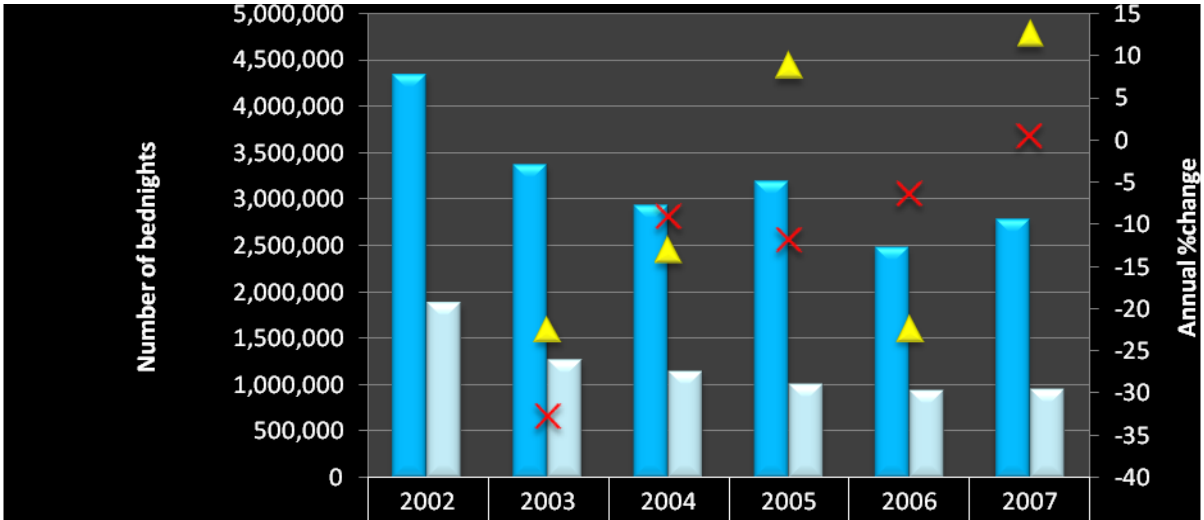
*Data based on establishments with 25 or more bed spaces

The decrease in supply between 2005 and 2007 might have been due to the global economic conditions as it wasn't due to declining demand since bed occupancy and guest nights increased during the same period.

4.0 National Level: Backpacking in South Africa

4.1 Demand-side trends

Nationally, backpacking accommodation demand indicators have been showing a downward trend, contrary to global trends. This finding, however, doesn't automatically imply decreasing backpacking activity, but could be signalling a shift in type of accommodation now in demand by backpackers with changing demographics. Figure 13 below shows backpacking and camping sites bed-nights trends over the past six years from SAT accommodation data. It can be concluded that demand for camping and caravan accommodation has been consistently declining during that period with a very insignificant gain (0.5%) in 2007 from 2006. Backpacker hostels trends have been more unpredictable from year to year. However, 2007 year-on-year growth showed robust growth, but only time can tell whether or not the momentum will be sustained.



	2002	2003	2004	2005	2006	2007
Backpacking hostels bednights	4,349,753	3,376,972	2,936,447	3,194,332	2,482,727	2,794,567
Camping & caravan parks bednights	1,882,729	1,266,365	1,151,548	1,015,201	950,244	954,955
Backpacking Hostel annual %change		-22.36	-13.04	8.78	-22.28	12.56
Camping & caravan annual %change		-32.74	-9.07	-11.84	-6.40	0.50

Figure 13: 2002-2007 Backpacker hostel and Camping accommodation use (Source: SAT 2002-2008)

Research indicates that the nature of the international backpacking market in the country has changed from the formerly typical 18-22 year old to older and more financially independent travellers who demand en-suite rooms instead of dormitory accommodation. There have also been more visits by school and sport groups who make use of backpacker services and facilities (Rogerson, 2007). This new trend could be the reason why demand for typical backpacker accommodation has been declining.

Most backpackers looking for accommodation in South African backpacker hostels are from Western Europe and are well travelled, long haul travellers (Barker, & Visser, 2004). Of these tourists, most are from Germany, United Kingdom and the Netherlands. Most tourists visiting South Africa are generally young men and women between the ages of 21 and 25. The majority of these are employed full time and are visiting the country for a period of 2 weeks to a month. A large proportion of these travellers travel alone and for those who travel in groups, the main reason is to share costs. The general budget of backpackers to South Africa is a total of R10 000 or less, excluding travel costs and any types of insurance.

4.1.1 Source Markets

According to the 2007 study commissioned by the Department of Trade and Industry (DTI, 2007) more than half of international backpackers in the country come from Western Europe, followed by Australasia (30%), North America (14%) and Central and South America (5%). The study also found that Southern Europe, Asia or the Middle East were insignificant markets for South Africa as there were no visitors at all from those regions. Israel was also found not to be a significant source market for South Africa even though it is a well-established market for the backpacking industries of Asia and South America.

Figure 14 illustrates the major source countries for international backpackers to South Africa. From figure 13 the main significant source markets for backpacking for South Africa include the UK, Australia, USA, Germany, Netherlands and to a lesser extent New Zealand and Canada.

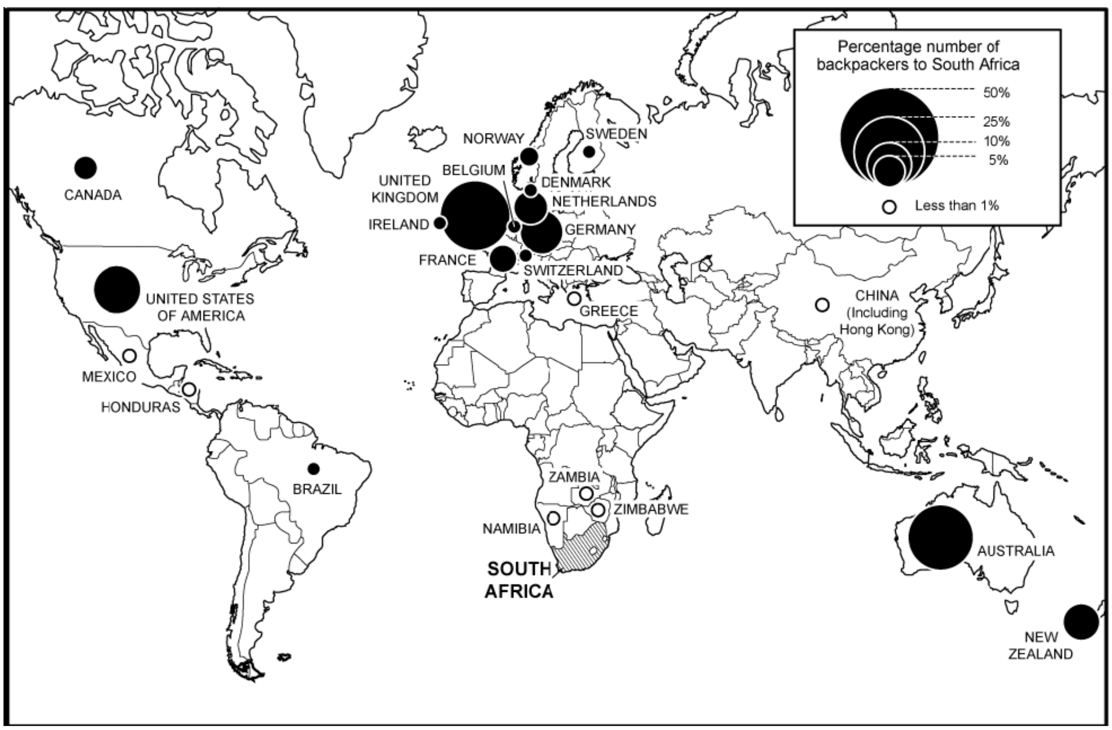


Figure 14: Main source markets for international backpackers to South Africa (Source: DTI 2007)

The majority (83%) of the international backpackers are first time visitors to South Africa. There, however, is a significant repeater rate of about 17%. Important to note is the fact that these travellers' decide to travel to the country an average of about four months before they depart.

4.1.1.1 Demographics

Age

There are no significant gender differences in backpackers to South Africa as the 2007 DTI study showed that visitors are about equally divided 52% male and 48% female. This finding is consistent with findings in other destinations. Backpackers to South Africa are mostly between the ages of 21 and 30 (70%), followed by below 20 (15%), over 35 (11%) and over 50 (4%). The average age of international backpackers to South Africa is 28 (DTI, 2007). Figure 15 below shows the age distribution of international backpackers to South Africa.

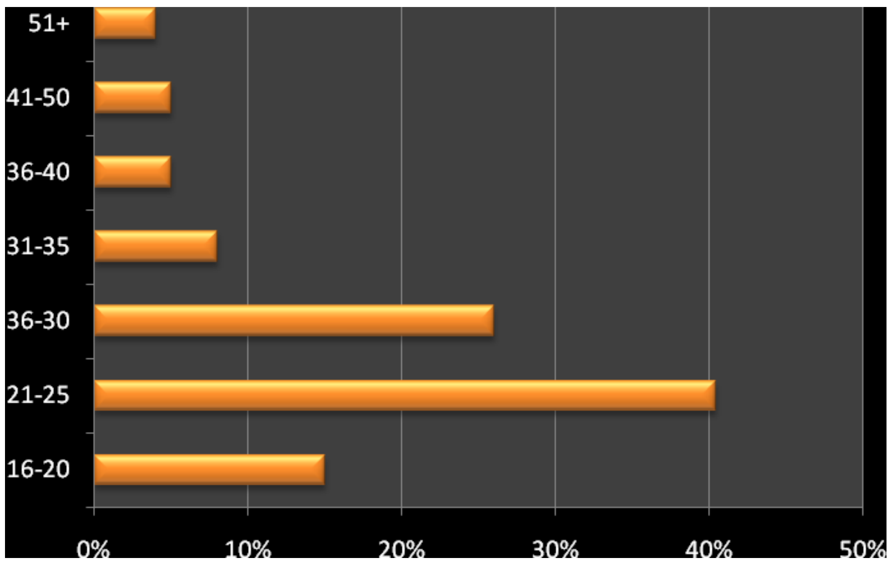


Figure 15: The age distribution of international backpackers (Source: EciAfrica, 2007)

Education

The typical international backpacker to South Africa is well educated and often already working as an early career professional. Consistent with backpackers in other global destinations, the majority (about 70%) have tertiary or post graduate university qualifications. Some of the common areas of profession include law, IT, computers and engineering. Some (17%) of these professional are ‘gapers’ taking a gap year in between studies or professions (DTI, 2007).

4.1.1.2 Average length of stay

International backpackers to South Africa stay for a period of 22-31 days, with the average length of stay being 42 days (DTI, 2007). About 73% of backpackers visit for a period of one month or less (Table 9). A critical finding is that backpackers spend much less time in South Africa then they do in other destinations such as Australia, Southeast Asia or the United Kingdom. Commonly, the stay in those countries would be 2-4 times longer than the stay in South Africa (EciAfrica Consulting, 2007). A critical factor influencing this trend might be to do with availability/or lack of work opportunities. Australia has work visa programs allowing backpackers to work during their long trips for income that they spend in the destination during their visit. In South Africa, working opportunities relate mainly to volunteer work with no formal pay.

Table 9: International backpacker length of stay in South Africa

Length of stay	Percent
3-7 days	8.7
8-14 days	19
15-21 days	21
22-31 days	24.6
32-90 days	15.9
91-180 days	7.2
181-365 days	3.1
More than 1 year	0.5

(Source: EciAfrica, 2007)

Backpackers don’t spend all their trip nights at backpacker establishments. Only about 45% of international backpackers spent all the nights in backpacker accommodation, the rest also use other forms of accommodation. Most volunteers use accommodation organised by the organisations that they work with. However, 68% spend three of every four nights at backpacker establishments and the remainder of the time is spent mainly with friends and family and/or in organised tours accommodation.

The several backpacker accommodation attributes considered as important by international backpackers when making accommodation choices are illustrated in Table 10 below. Cleanliness and friendly staff top the list of important attributes. However, almost all of the attributes are generally considered important except for a few including swimming pool, restaurant, satellite television and medical bay. This finding is important as it highlights that backpacker tourists might be an easier group to please than regular tourists as they look for and require the most basic features from the destination.

Table 10: Accommodation attributes considered as essential by international backpackers

Service / facility	Proportion rating it as essential
Clean bathrooms	91.5
Clean beds	90.1
Friendly staff	88.7
Self-catering	78.2
Internet	76.8
Travel information	76.1
Lockers	63.5
Laundry	61.4
Bar	56.3
Shuttle transport	55.3
Pay phones	54.6
Swimming pool	24.6
Restaurant	16.0
Satellite television	13.3
Medical bay	10.6

(EciAfrica Consulting, 2007)

4.1.1.3 Spend

Table 11 below shows that accommodation is the highest item of expenditure for both backpackers and non-backpacker international visitors to South Africa. For backpackers accommodation is followed by activities and food in that order while local transport costs come second for other visitors. An important fact to note is that backpackers to South Africa don't consistently spend more across all categories as is the case with Australia. Recall that spending categories for Australia discussed earlier showed international backpackers consistently spending more than traditional tourists. In South Africa backpackers spend more than traditional tourists on activities and food, but not on accommodation. Since the spend is for the whole trip, this finding might be due to the shorter length of stay of backpackers in South Africa compared to that for Australia, therefore length of stay gains fail to off-set the loss from use of lower cost backpacking accommodation.

Lower transport costs for backpackers might be an indication of less travel to different backpacker destinations within South Africa, implying that backpackers probably visit one major destination and stay within that area, due to either lack of a variety of backpacker offerings across the country or lack of knowledge about such offerings. Australia has a lot of well known backpacker destinations in the different regions of the country that visitors spent a lot of money on domestic flights and other transport modes connecting between all those destinations. The case for South Africa might be inadequate or lack of advertising and showcasing of all the different backpacker offerings across the different regions/provinces of the country.

Table 11: 2007 Average spend per trip in South Africa by international backpackers & other visitors by category of spending

Item	Backpackers***	Other tourists****
Accommodation	R2 686	R4 580
Activities/leisure	R2 490	R1 860
Food	R1 880	R1 680
Local transport	R1 754	R1 900
Souvenirs / shopping	R1 379	R1 800
Beverages	R1 359	-
Volunteer work*	R17 591	-
Other **	R11 373	-

*Includes accommodation, meals, transport and certain activities during period of placement

Includes medical costs; *(Source EciAfrica, 2007); ****(Source: SAT, 2007)

4.1.1.4 Purpose of visit

Holiday (39%) is the main purpose of visit for most of the international backpackers visiting South Africa, followed by search for adventure (28%), touring (19.9%), and visiting friends and family (7.8%). A small percentage of backpackers' main purpose of visit is business (7.5%) (DTI, 2007). The listed motivating factors for visiting South Africa include:

- To experience the culture
- To meet local people
- To experience South Africa's natural diversity, wildlife and game parks. It is important to note that in the 2007 DTI study 82% if the international backpackers indicated that South Africa's natural diversity had played an important to very important role influencing them to select the destination.

Backpackers visit South Africa expecting authenticity with regards to cultural experience. They expect to enjoy a cultural experience that is real and not staged. Other things they come expecting include:

- meeting locals outside of the tourism environment
- being able to see traditional and contemporary South African life
- get to experience both the urban and rural areas

- be able to could wander around and meet people
- get to experience the way of life of the locals first-hand, not through a window
- interact with locals from all socio-economic sectors and cultures

Other strong motivations for travel to South Africa are that backpackers see it as a gateway to Africa as they travel on an expanded itinerary and for humanitarian work. For many travellers, a visit to South Africa is part of a wider global itinerary. The most significant destinations visited in Africa apart from South Africa on these global itineraries include Swaziland, Mozambique, Botswana and Namibia.

4.1.1.5 Information sources

When sourcing information for their trip to South Africa, the core channels used include Lonely Planet, word of mouth recommendation, the Internet, Coast to Coast, previous visits, information from friends and relatives, tour operators, brochures, volunteer programmes, travel agents and the Best of Backpacking Southern Africa. The main information sources used when looking for information on the country are the websites of South African Tourism and the Lonely Planet. The Internet also plays a key role in pre-trip planning and in communication once at a destination has been selected. The two most important websites used by international backpackers are those of Lonely Planet and of South African Tourism. Other websites used regularly include Greyhound, Alternative Route, About Cape Town and various travel blogs. It is important to note that in terms of information sources, blogs are often more useful to backpackers than official websites such as Hostelworld, STA travel and the Baz Bus.

With bookings, although backpackers make use of travel agents for some parts of their trip, the most common channels used to make bookings and arrangements include the Internet, which accounts for one third of all flight bookings made.

4.1.1.6 Mode of transport

When travelling to various destinations once arrived, a variety of transport services are used. However the most commonly used are rental car, Bazbus, private car and hostel shuttle in that order. The following figure illustrates transportation usage by international backpackers.

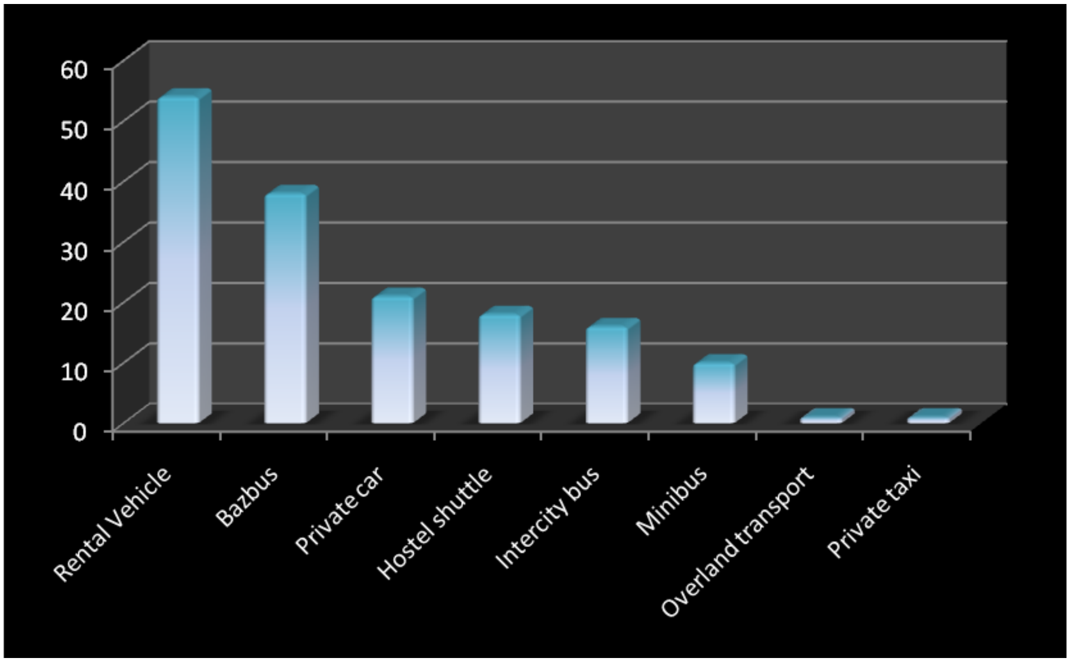


Figure 16: Transportation use by international backpackers (Source: EciAfrica, 2007)

4.1.1.7 Where international backpackers go & what they do in South Africa

The Western Cape is the most popular backpacker destination in South Africa, with almost all (93%) of international backpackers visiting the province. Kwa-Zulu Natal, Gauteng and the Eastern Cape come second, third and fourth respectively (Barker & Visser, 2004). The following table illustrates provinces visited by backpacker and other tourists in South Africa. It should be noted, however, that the Western Cape is still the most popular destination even with the other non-backpacker international tourists (Table 12).

Table 12: Provinces visited by backpacker tourists in South Africa

Province	**Average overseas tourists (%)**	**Average backpacker tourists (%)**
Eastern Cape	23	56
Free State	5	10
Gauteng	45	64
Kwa-Zulu Natal	26	71
Limpopo	6	0
Mpumalanga	12	43
North-West	6	0
Northern Cape	6	9
Western Cape	65	93

(Source: Barker & Visser, 2004)

From Table 13 below it is clear that backpackers take part in a wide range of activities. This finding is consistent with what happens in other regions of the world. It has been documented that backpackers engage in a lot more activities within the destination than do regular tourists do. It can be seen that Cape Town is quite a popular destination with a lot of backpackers participating in a variety of activities offered in Cape Town. Visiting natural sites tops the list, followed by game viewing, visiting museums, historical sites, townships and many others (refer to Table 13.

Table 13: Popular activities of backpackers in South Africa (in %)

Activity	Proportion Participated	Hotspots
Visiting natural sites	59.4	All of South Africa but especially Cape Town, Drakensberg, Coastlines, St Lucia and the Wild Coast
Game viewing / safaris	50.7	Kruger Park, St Lucia, Addo
Museums	49.3	Johannesburg, Cape Town
Historical sites	46.1	Cape Town
Night clubbing	44.3	Cape Town, Durban, Johannesburg, Garden Route
Township tour	43.4	Johannesburg, Cape Town
Hiking	42.5	Drakensberg, St. Lucia, Swaziland, Cape Town, Wild Coast, Garden Route, West Coast
Cultural village	32.0	Wild Coast, KwaZulu Natal, near Kruger Park, Swaziland
Wine tours	29.7	Cape Winelands
Mountain biking	15.5	Cape Town, Oudtshoorn
Surfing	15.1	Wild Coast, KZN South Coast, Cape Town, Durban
Horse riding	12.3	Lesotho, Cape Town, Wild Coast, Garden Route
Rafting / kayaking	10.5	Garden Route, Wild Coast, KZN South Coast
Shark viewing	10.1	Hermanus, Cape Town
Bungee jumping	8.7	Storms River
Whale watching	7.3	Hermanus, St. Lucia

(Source: EciAfrica Consulting, 2007)

4.1.1.8 International backpacker experience in South Africa

Generally, international backpackers make positive assessments of South Africa. Of particular importance is the fact that about 93% of international backpackers interviewed in the 2007 study by EciAfrica indicated that they would recommend South Africa as a destination to other backpackers, family and friends. The most commonly cited highlights of the South Africa visit included Cape Town, Kruger Park, adventure activities, social interactions with South Africans, shopping, entertainment, township tours and the country's natural diversity. The two most outstanding disadvantages identified of South Africa as a destination are crime on and the poor public transportation system.

4.2 Backpacking in South Africa: supply-side trends

The largest number of backpacking accommodation establishments is found in the Western Cape, followed by the Eastern Cape, Kwa-Zulu Natal, Gauteng and Mpumalanga. By contrast, there is only limited provision of accommodation in the Free State, the Northern Cape, the North West and Limpopo. There are significant clusters of backpacker accommodation establishments along the Garden Route, the Wild Coast and the Kwa-Zulu Natal coast, and also in inland areas such as Hogsback and Nelspruit. In terms of local development, backpacking plans a large role in the economies of Coffee Bay, Jeffrey's Bay, Mossel Bay and Oudtshoorn (DTI, 2007).

The following figure illustrates the geographical distribution of suppliers of backpacker accommodation in South Africa by province.

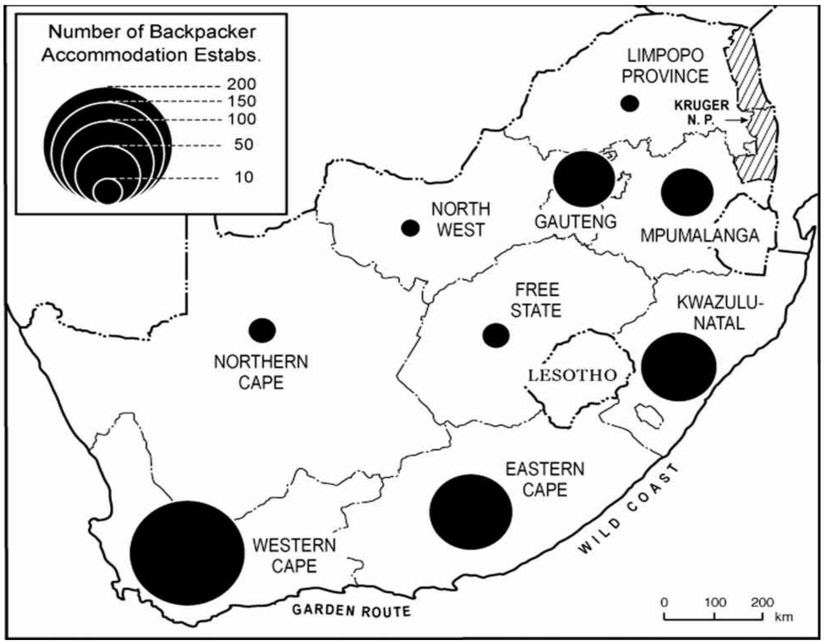


Figure 17: The geographical distribution of suppliers of backpacker accommodation (Rogerson, 2007)

The figure above shows that most backpacker accommodation facilities are located in the Western Cape, followed by the Eastern Cape, Kwazulu-Natal, Gauteng and Mpumalanga. Very little backpacking accommodation can be found in the Northern Cape, the Free State and the North West. The following Figure 18 illustrates the geographical distribution of suppliers of backpacker accommodation in South Africa by locality.

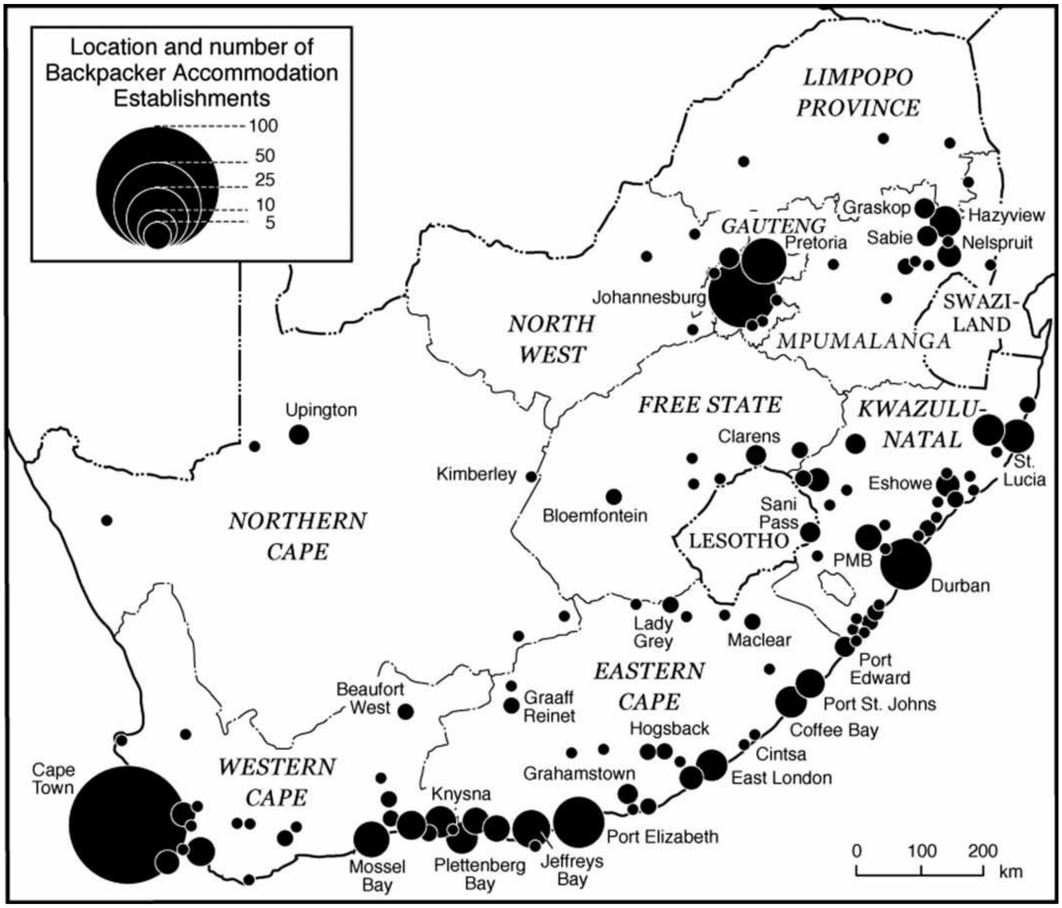


Figure 18: Geographical distribution of suppliers of backpacker accommodation, by locality (Source: Rogerson, 2007)

Recently there has been increasing competition amongst backpacker establishments in South Africa, particularly in the Western Cape and the Eastern Cape. This suggests that unless backpacker numbers increase and international backpackers stay longer, the number of backpacker suppliers in the areas may be reaching saturation point (Rogerson, 2007).

In the South African backpacker study conducted by (EciAfrica, 2007) it was noted that the backpacking accommodation sector is dynamic as there is constant emergence of new enterprises and demise of the old ones. This trend is in line with the previously discussed global trends of continual upgrading and modernising of backpacking accommodation in response to the changing demographics of this niche market. The study also found that the segment is significantly greater than assumed, at least double the number that is recorded with South Africa Tourism. The backpacking accommodation sector is predominantly male with some entrepreneurs originally from the United Kingdom, Namibia, Poland, Germany, Ireland, Mauritius, the Netherlands, Zambia and Austria. Most backpacking establishments are SMME's and are owned either by individuals, families or by partnerships.

5.0 Backpacking at the Local Level: Cape Town & Western Cape

It has been discussed in the preceding section that the Western Cape is the most popular backpacking tourism destination in South Africa, particularly Cape Town. The Western Cape and more specifically, Cape Town, is the focal point of attraction for international backpackers. On average, 75% of backpackers stay at least one night in the region (DTI, 2007). Other popular places include the Kruger Park, Durban, Port Elizabeth, Jeffrey's Bay, Paarl and Stellenbosch, Knysna, Coffee Bay, Plettenberg Bay and Wilderness. The most frequently visited provinces are the Western Cape, Eastern Cape, and Kwa-Zulu Natal. Gauteng plays a special role as its airport in Johannesburg is a major point of entry for backpackers. A significant point to note is that a good majority (60%) of international backpackers are not able to visit all the places in South Africa that they would have liked to because of lack of awareness of the attractions and facilities and shortage of time. This signals lack of marketing by service providers and destinations.

5.1 Cape Town backpacking demand trends

Demand indicator data at the local level in terms of backpacker occupancy rates, employment, receipts and growth figures is limited as service providers are either sceptical or unwilling to provide their business data. The researchers are still in the process of soliciting these data and will be analysed as it is received. However, this section will be covered more fully with the primary data as this research process includes primary data collection at the local level.

5.1.1 Backpacker accommodation demand and employment

Since Cape Town is the hot point of tourism in the Western Cape, the available provincial demand data gives an indication of backpacking demand in the city. The Western Cape enjoys the highest occupancy rates in backpacking accommodation with annual average occupancy rates of about 66% (DTI, 2007). Figure 19 below shows that the Western Cape is, by a substantial margin, the leading backpacker destination as the average annual occupancy rates are quite high in comparison to other provinces.

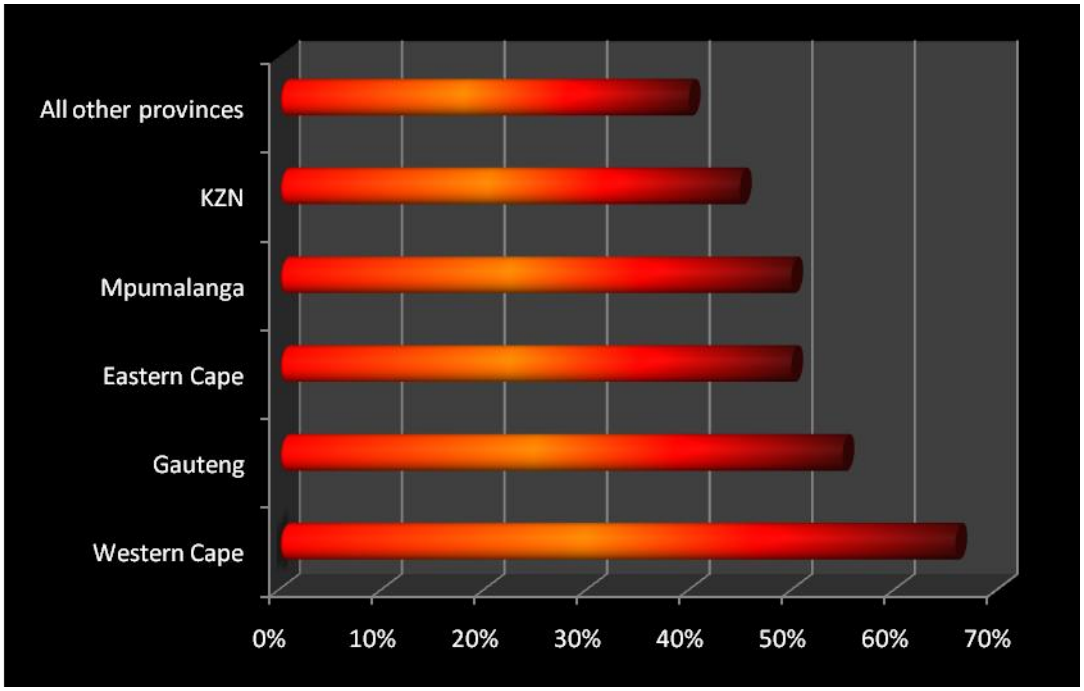


Figure 19: Backpacking accommodation average occupancy rates by province (Source: DTI, 2007)

Jobs data also show a similar trend with the Western Cape leading in terms of number of employees per establishment, implying that there is greater demand for backpacking services in the Western Cape compared to all the other provinces. Employers hire more help to cope with increasing demand. However, since the data is cross-sectional it doesn't show the trend over time. Figure 20 shows employment by backpacking accommodation enterprises in the provinces.

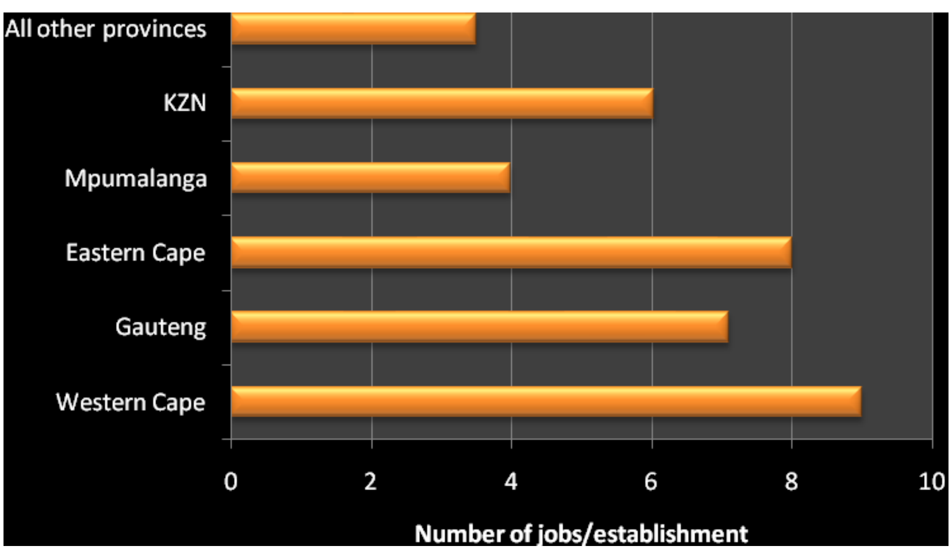
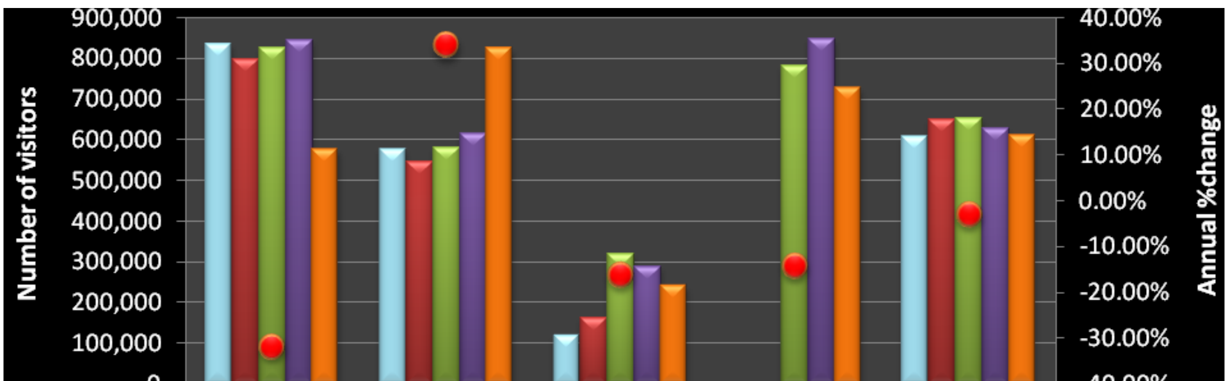


Figure 20: Number of employees/establishment (Source, DTI, 2007)

5.1.2 Attractions visitation

Some of the most popular backpacker activities in Cape Town include visiting attractions such as exploring Table Mountain through both hiking and cable car, visiting the Green Market Square, Cape Point, Robben Island, the Castle, wine and township touring. While attraction visitation numbers are not the best indicator of backpacking activity due to overlaps as all kinds of tourists also visit these areas, they give an indication of the general trend of demand of tourist products. Figure 21 below shows visitation trends to major attractions in Cape Town, which are most popular by backpackers. Visitation trends to the attractions show a decreasing trend as well except for Table Mountain National Park-Cape of Good Hope. The decreasing 2008 year-on-year trends could be compounded by the global economic crisis.



	TMNP-Boulders	TMNP-Cape of Good Hope	Robben Island	Table Mountain (cableway)	Kirstenbosch Botanical Gardens
2004	835,305	577,507	119,812		607,935
2005	796,656	545,018	163,458		648,579
2006	825,848	580,907	319,503	780,819	653,580
2007	844,423	615,197	289,149	847,599	628,953
2008	576,347	823,386	242,277	727,000	610,309
07/08 %change	-31.75%	33.84%	-16.21%	-14.23%	-2.96%

Figure 21: 2004-2008 Visitation numbers to Cape Town's most popular attractions (Source: Attractions)

5.1.3 Travel patterns

Activities participated in by backpackers in Cape Town don't particularly differ from those participated in by backpackers elsewhere. Backpackers are generally outgoing and adventurous and the pattern can be seen in Cape Town as well. The most popular backpacker programmes include exploring Table Mountain, whether hiking or using the cable car; visits to Green Market Square, Cape Point, Robben Island and the Castle; a wine tour and a township tour. In more rural locations such as Coffee Bay and the Wild Coast, activities are limited to hiking, drinking in the local pub and participation in hostel organised activities such as abseiling (Barker, & Visser, 2004).

What is distinguishing with Cape Town is the average length of stay compared to that of other regions. Cape Town average length of stay of backpackers was estimated to be six-seven nights, compared to two nights in other places within the Western Cape, two nights across the Eastern Cape, KwaZulu-Natal, Gauteng and Mpumalanga and, between one and two nights in the elsewhere (DTI, 2007).

5.2 Local supply-side trends

5.2.1 Accommodation

It is evident that the Western Cape, particularly Cape Town has the greatest supply of backpacker accommodation. As discussed earlier (in the national section) and illustrated in Figures 17 and 18, the Western Cape and Cape Town have about 200 and 100 backpacker accommodation respectively (DTI, 2007). Figure 22 below shows the spatial distribution of accommodation suppliers in Cape Town including backpacking accommodation. It is evident that backpacker accommodation is highly concentrated around the city.

Figure 22: Spatial distribution of accommodation establishments in Cape Town (Source, Van Der Merwe Ferreira and Van Niekerk, 2007)

In terms of bed supply, the bed number data sets between CTRU and CoCT differ between having 14 and 20 Hostels, and the bed data from CoCT indicates 455 beds. In searching the following publications, www.alternativeroute.net and www.coastingafrica.com, 34 backpacker accommodation establishments are listed. Clearly, there is a need to confirm actual supply. The Backpackers "Overview" map (Figure 23) shows the overall backpacking accommodation density for the metropole, while the Backpacker "Hotspots" map (Figure 24) expands on the highest accommodation density to illustrate distribution of backpackers (Accommodation) in the City.

Figure 23: Overview of Backpacker Accommodation Supply in Cape Town (Source: CoCT and CTRU GIS data)

Figure 24: Backpacker Hotspots in Cape Town (Source: CoCT and CTRU GIS data)

5.2.2 Tour operators and transport

The 2007 audit of backpacking suppliers of transportation and tour services commissioned by the DTI identified nearly 60 enterprises in this category nationally, of which more than half are in the Western Cape. The biggest backpacker transport and tour operator is Bazbus and it maintains its headquarters in Cape Town since Cape Town is the national epicenter of this niche sector.

Outside of the Western Cape it is evident that the only significant transport suppliers are small clusters of transport, travel service or tour suppliers operating in Johannesburg. Other transport operators are the based in Nelspruit dealing with Kruger Park tours. Figure 23 below clearly shows the dominance of the Western Cape with regards to backpacking transport suppliers.

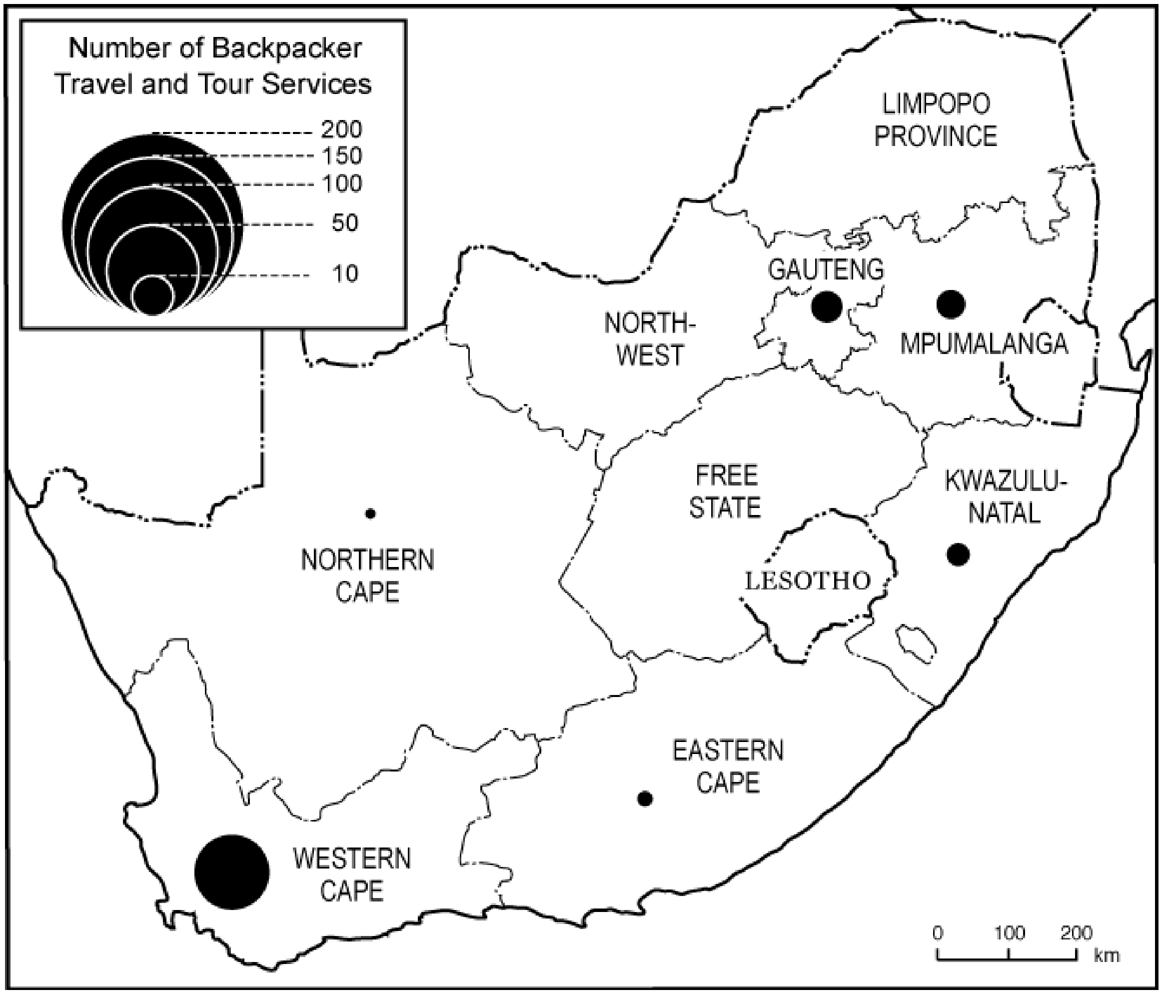


Figure 25: The Location of Suppliers of Backpacker Travel and Tour Services (Source: DTI, 2007)

5.2.3 Attractions

The Western Cape and Cape Town in particular has a lot to offer to the backpacker tourists. There are plenty of world class attractions and offerings including the hot spots such as Table Mountain, Robben Island, Kirstenbosch Botanical Gardens; historical and cultural tours such as township tours; museums; winelands; parks and scenic natural attractions such as Cape Point and many others. It can be concluded from the desktop data and information that there might be other issues in Cape Town with regards to backpacking tourism, but lack of 'what to do and visit,' is certainly not one of them. The niche market map below (Figure 26) is of the metropole showing points of operation for the various niches (operations can include establishments and activities, which would need detailed site visits to clarify). This map gives a sense of zoning and where most nature and adventure activities take place.

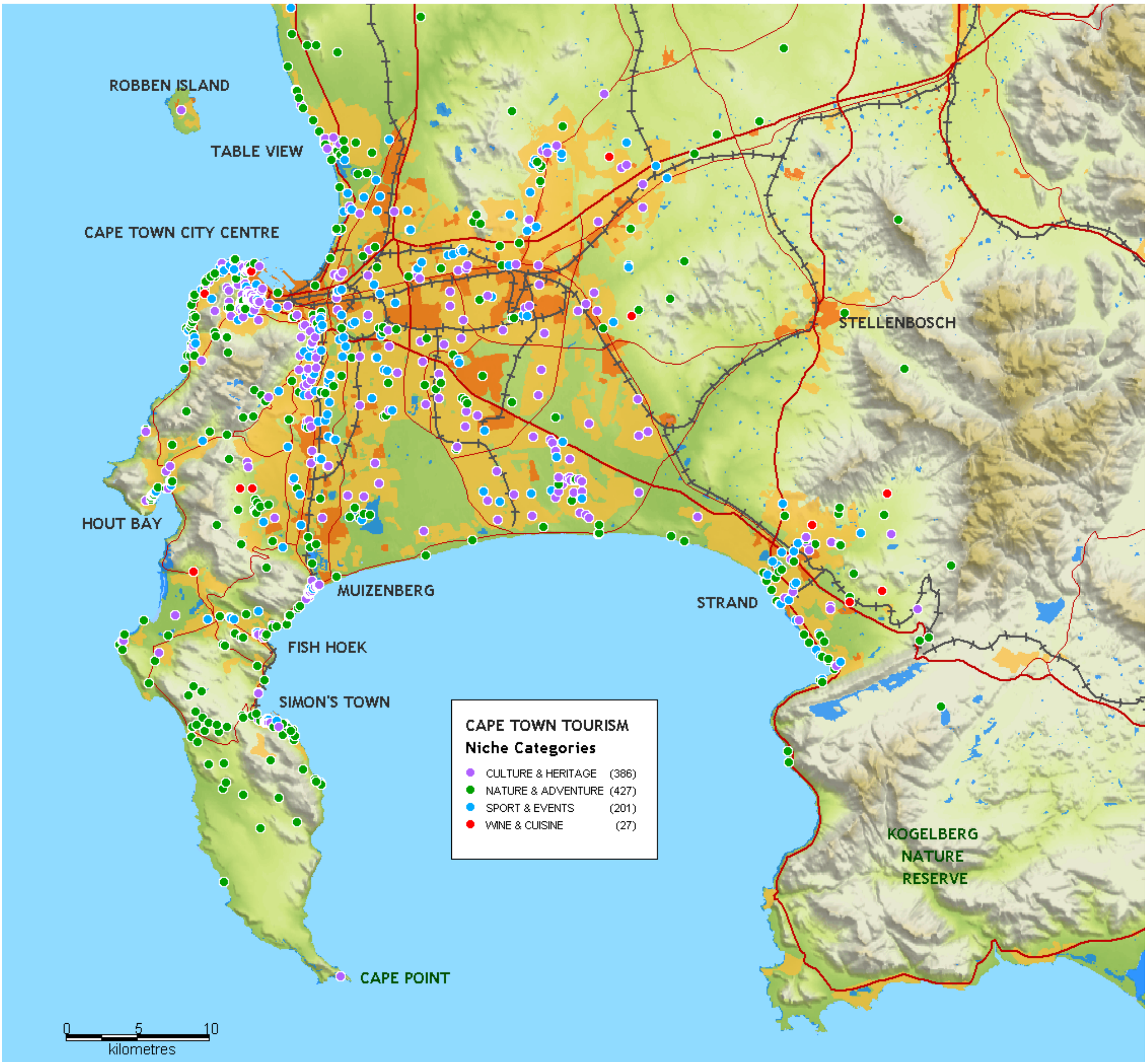


Figure 26: Cape Town Tourism Niche Categories (Source: CoCT and CTRU GIS data, 2006)

6.0 The Impacts of Backpacker Tourism

6.1 Positive impacts

Little emphasis has been placed on the impacts of backpacking on local economies, development, local communities and the physical environment. As backpacking to an area increases, local economies may move from agriculture and fishing as the demand for labour increases, property values rise and infrastructure improves. In many cases, former backpackers settle down in a destination and establish their own businesses (Brenner & Fricke, 2007).

Backpacking tourism can contribute significantly to local economic development as backpackers generally purchase locally produced goods and services and prefer to interact with local people.

Compared to other forms of tourism, backpacking results in far fewer economic leakages and can support local development in the following ways:

- Money spent is spread across a wide geographical area, including remote and isolated regions which are not frequented by mass tourists
- Money is spent on locally produced goods and services
- Only basic infrastructure is required
- There is pride and consideration for local cultures and communities
- Demand is less likely to be diminished by threats of political instability or international problems (Barker & Visser, 2004)

When considering investment into the backpacking industry, entry costs for locals are low and minimal capital is required, which enables greater participation. Once backpacker establishments are functioning and well established, they provide a certain ambience to the area in which they are located and the presence of international tourists stimulates other economic activities such as the development of Internet cafes, clothing outlets and the organisation of excursions (Barker, & Visser, 2004).

6.2 Negative impacts

While backpacking has a lot of benefits, it also can have negative impacts especially when not properly planned and managed. Backpacking like other forms of tourism can lead to increased demand for local services, resources and infrastructure, thereby burden the tax payer. Growing backpacker enclaves may push out local residents as costs for essential services and real estate rise. Backpacking can lead to the degradation and destruction of the physical environment by overuse of scarce resources such as water (Howard, 2007).

7.0 Challenges

7.1 Infrastructure

With the growth of the backpacking segment, there needs to be commitment to develop infrastructure catering specifically to this segment parallel to the infrastructure that caters for traditional tourists. This infrastructure should comprise of inexpensive transportation systems, with low priced hotels and youth hostels surrounded by shops, nightclubs and coffee houses.

7.1 Shortcomings for local development

Apart from the opportunities that have been created for black employees, the expansion of backpacker tourism has been primarily around white owned businesses, tour operators and members of the tourism industry. There is also a lack of backpacker services and facilities in township, clusters are continually being established along popular tourist routes. There seems to be a lack of training provided by local authorities or provincial and national government providing people with the basic skills needed to enter the industry. Seasonality is also a challenge as there are two distinct visitor seasons in the country implying that income doesn't flow throughout the year. In order to overcome these issues and to ensure further local development there needs to be concerted efforts to improve government and industry working relations to improve tourist flow to local backpacking destinations (Barker, & Visser, 2004).

7.2 Lack of government support

Suppliers of backpacker products in South Africa face a number the challenge of lack of support from national, provincial and local governments. These challenges include lack of regulations from local government such as zoning, lack of marketing and financing support. In addition backpacking entrepreneurs face problems securing insurance coverage since backpacking is not officially recognized, (Rogerson, 2007).

7.3 No strong domestic backpacker market

Most establishments depend mainly on international backpackers not domestics. The Western Cape enjoys the highest occupancy rates from international backpackers. Backpacker accommodation suppliers prefer these international visitors because domestics are said to: cause too much trouble, bad mouth the country, steal and abuse cheap accommodation. Domestics don't make use of any support services and they want to rent accommodation by the hour (Rogerson, 2007).

7.4 Lack of marketing

Backpacking entrepreneurs in South Africa face challenges of lack of international and domestic marketing of the destination as a competitive destination and lack of responsiveness to backpacking issues at the provincial and municipal levels. There is inadequate or lack of linkages and networking among enterprises in the industry (EciAfrica Consulting, 2007).

8.0 Primary Data Results

This study involved primary data both for the supply and demand sides. Primary data was obtained by use of structured questionnaires. For demand-side trends data was solicited both form those backpacking tourists that had visited the destination and those that had not visited the destination. The goal was to understand the destination's strengths and weaknesses from those that had visited the destination and understand why tourists decide not to visit the destination in favour of others from those that had not visited the destination. The goal for the supply-side data was to understand the capability of the market to meet the tourists' demand and requirements from the supplier's viewpoint.

The study's supply-side target sample size was 90 comprising of 30 each from the following sectors: accommodation, attractions, transport and tour operators. However, this target was off by a big margin for two main reasons. First, as the study progressed it came apparent that there are not that many backpacking dedicated suppliers in Cape Town in the first place, so even if the target was meant 100% there would not be enough backpacking suppliers. (Suppliers were identified by Cape Town Tourism (CTT) and Backpacking South Africa (BSA), which is part of the South African Youth Travel Confederation (SAYTC). Volunteering South Africa, Tours and Transport South Africa and Education South Africa are other sub-sectors of SAYTC). Secondly, the response from those that are in the backpacking business was very low. Suppliers were mostly very sceptical and uninterested, therefore were either not willing or not able to participate in this study, despite the study being conducted in collaboration with BSA. The final valid responses obtained from suppliers, therefore, were only 14: seven lodging, three language schools and four tour operators.

The study's demand-side target sample size was 250 comprised of 150 international and 100 domestics. The goal was to obtain 100 responses from internationals that had visited the destination and 50 from those that had not visited Cape Town, but had visited other backpacking destinations. The goal for domestics was 70 of those that had visited and 30 of those that had not visited. The result was a total of 84 international respondents that had visited the destination and four domestics that had visited the destination. At the time of this report there were no responses from the 'have not visited' group, both internationals and domestics. The highest response rate of 84% was from the internationals that had visited the destination.

8.1 Supply-side Results

8.1.1 Lodging

There were only seven responses from the backpacking lodging suppliers. The results will, therefore, be presented as frequencies since there were too few responses for any other analyses. Of the seven respondents two were from the South Atlantic Coast region of Cape Town, three from the Central Atlantic Coast and two from the North-East Atlantic Coast. Five were pure backpacking hostels, one guest house and one backpackers' lodge. The establishments' sizes ranged from eight rooms to 188 rooms and were from two months to 15 years old. Two of the establishments were 4-star, two 3-star, one 1-star and two were not graded. All respondents were current members of BSA and all agreed that backpacking associations are required for several reasons including, but not limited to:

- Maintaining standards within the industry
- Assist with marketing
- Assist with provision of information

- Offer assistance to SMMEs
- Provide networking platforms
- Government lobbying

All respondents stated that backpacking establishments require a grading system of their own separate from the generic accommodation grading system. All the respondents got the bulk of their business from backpackers; four got 100% of their business from backpackers and the rest got between 50 to 95% of their business from backpackers.

Business trends and advertising

From the backpacking service providers, business seems to be doing great as 71% indicated that their business has been increasing in the past five years. One indicated that business was the same while another stated that business had been declining in the last five years. The fact that business has been on the rise for most of the respondents is a good indication that the sector may be on a growing trend.

The establishments use several advertising channels to expose their businesses. Figure 27 below shows the main advertising channels used by backpacker lodging providers to expose their businesses. It is important to note the importance of the Internet and word of mouth in spreading the word. All the respondents utilise the Internet in one way or the other, while the majority also rely on word of mouth. It is of particular interest to discover that traditional word-of-mouth channel is still that relevant a method of advertising even in this age of information and advanced technology. It goes further to illustrate the uniqueness of the hospitality sector that, personal touch is still very much relevant even though all the other industries are getting more and more automated and 'people-free.'

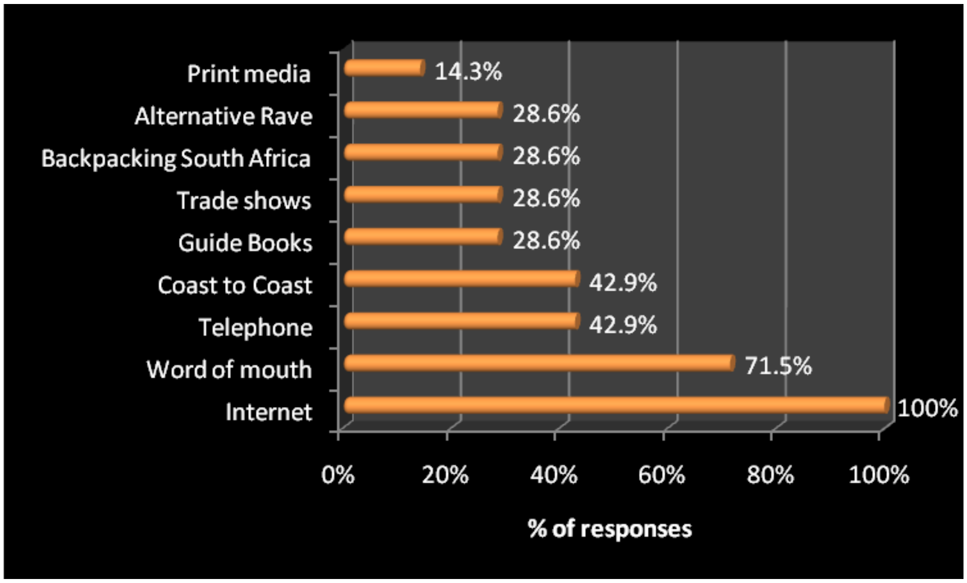


Figure 27: Advertising channels for backpacking accommodation establishments
(*Totals will be greater than 100% due to multiple responses)

Seasonal trends

As would be expected, summer seems to be the best season for backpacking lodging businesses in Cape Town as they achieve more than 75% occupancy rates during this season. Four (57.2%) of the establishments achieve over 75% occupancy in summer, two achieve between 51-75% occupancy in summer and one less than 50%. The next good season for the lodging establishments after summer is spring, followed by autumn and winter. Figure 28 below illustrates the seasonal occupancy rates as reported by the participating establishments. The graph shows that in summer no establishments record occupancy rates below 25% while the reverse is true for winter, where no establishments reported occupancy rates over 75%. However, the fact that almost half reported that they achieve occupancy rates between 51-75% in winter is impressive. It goes to show that, while winter is a relatively slow season across the board, backpacking is quite resilient to sustain such occupancy rates during this season.

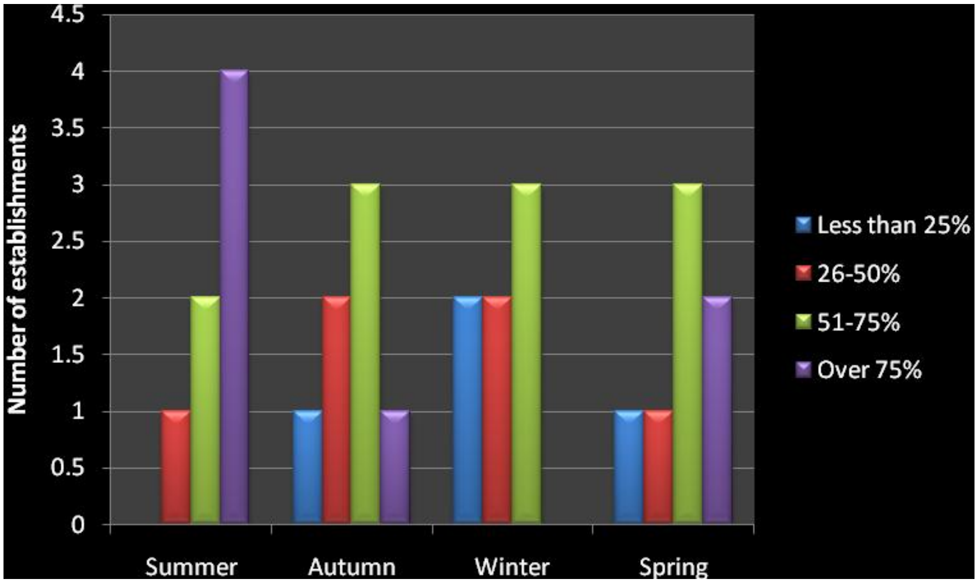


Figure 28: Seasonal occupancy rates

Summer also seems to be the season that most lodging establishments achieve their highest room rates as indicated by four of the seven establishments. Other seasons and periods that the establishments achieve highest room rates include spring and school holidays. One establishment indicated that they charge a flat rate across all the seasons, their rates are not seasonal.

Asked about the best source markets for each season, the respondents gave a wide range of countries. There were several markets pointed as the most suitable for each season according to the establishments' business patterns. Table 14 below shows the seasonal markets for backpacking in Cape Town.

Table 14: Top source markets by season (number of times each market has been mentioned as top source market for that season by respondents)

	Summer	Autumn	Winter	Spring	Total
UK	4	2	3	2	11
Germany	3	2	2	3	10
Netherlands	2	1		1	4
Europe in general	2	1	1	2	6
South Africa	2	3	4	1	10
Australia	1	-	1	1	3
Scandinavia	1	1	1	2	5
France	-	1	2	-	3
USA	-	3	1	-	4

The findings suggest that the UK, Germany and domestic are important source markets for backpacking overall. The findings further suggest that the domestic and UK markets are especially important source markets for the low winter season as they have been mentioned the most number of times as the main sources of business for the backpacking establishments. The domestic market is the only one that was mentioned more for the winter season than for summer season, implying that it is a market very worth looking at as it pertains to addressing the destination's seasonality challenges. Overall, Europe is the most important backpacking source market for Cape Town, as five of the top nine mentioned source markets are European. The respondents mentioned that their clients are mostly either European or domestic.

Visitor characteristics from the supplier's perspective

The respondents described their clients as mostly: young, between the ages of 25-35, of medium socio-economic status and both male and female. These findings are consistent with the visitor characteristics observed for other global backpacking destinations. Because, the backpackers are mostly young, they are either students or at the beginning of their careers, therefore, mostly of medium rather than high economic status.

The tourists travel mostly travel in pairs/couples or small groups of ten or less and have short (less than six nights) to medium (7-14 nights) length of stay.

Domestic tourists tend to have very short advance booking time compared to other markets. According to most of the backpacking lodging suppliers their domestic clients are mostly walk-in. Other make one to two weeks advance bookings, but not longer than that. African (excluding domestic) tourists book up to three months in advance, but also do walk-in. European and South American backpacking tourists book mostly a month to six months in advance, while Asian tourists book at least three to six months in advance. North American tourists book their accommodation mostly three months in advance. According to the respondents, however, all also do walk-ins regardless of their origin. The walk-in finding across all tourists corroborates the fact that backpackers travel on flexible schedules without much of a concrete plan and just look for accommodation as they get into the destination.

Yield by tourist source market

The respondents were asked to rank the different source markets of their customers with regards to yield per customer per night and also list the top five source markets from which their businesses got the highest yield per visitor in 2008. Figure 29 illustrates the rankings of source markets by yield for the lodging establishments per customer per night. The respondents were asked to rank the source markets from 1 through 7 starting with the highest to the lowest yield/customer/night markets. European visitors seem to be high value customers for the lodging establishments as they were ranked first the most number of times (five times). The only other source market that got first rankings was domestic. What this implies is that European and domestic markets are valuable to the backpacking sector. Lodging establishments get more from European tourists per night than they do from tourists from other source markets.

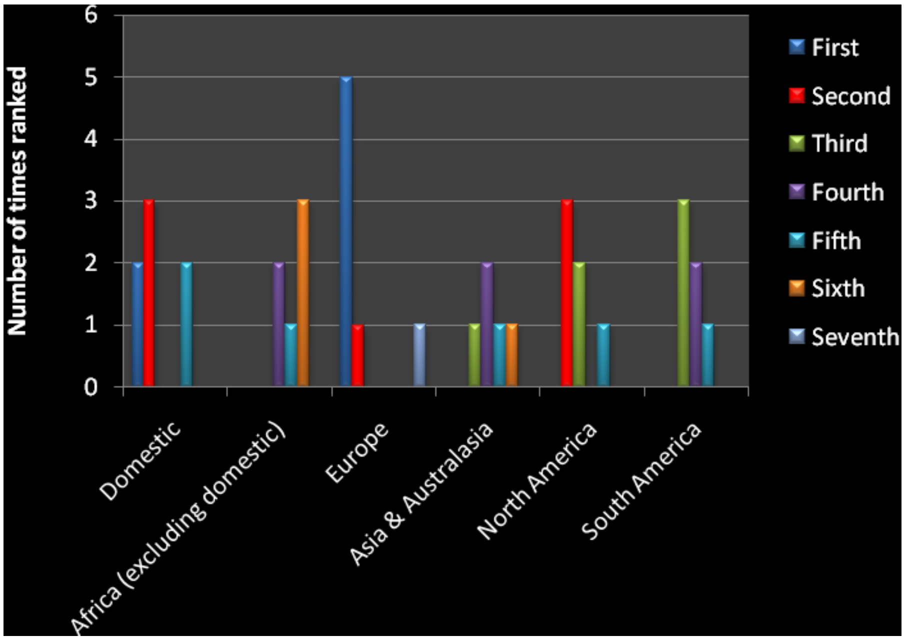


Figure 29: Ranking of source markets by yield per customer per night

North America and domestic were both ranked second three times and Europe was ranked second once. These three were the only ones that got a number two ranking. Asia & Australasia and South America only start at position three. African (excluding domestic) only came in at rank fourth and was ranked sixth three times, implying that it is not a high value market for the backpacking lodging establishments.

Respondents were also asked to list the top five source countries from which their businesses received the highest yield per visitor in 2008. The results yielded a list of what the backpacker establishments consider to be their high value source countries. The list is as follows:

- UK
- Germany
- Domestic
- USA
- Netherlands
- France
- Nigeria

- ❖ Australia
- ❖ New Zealand
- ❖ Belgium

The findings are consistent with the other findings that place Europe at the top of the important backpacking source markets to Cape Town.

Importance-Performance (I-P) for the backpacking lodging sector from the supplier's perspective

The backpacking lodging suppliers were asked to rate the importance of several accommodation attributes demanded by backpackers as they perceived them and also rank their performance on each of those attributes. The purpose was to identify the gaps between what is demanded by the tourists and what is delivered by the service providers. The tourists themselves were later asked to rate the importance and performance of the same attributes with the goal of understanding the actual importance and performance from the tourists' view and the compare with the provider's perception.

Importance-Performance Analysis (IPA) is an important tool that enables management to realise their areas of strength, weaknesses and those that need urgent intervention and/ or no intervention. IPA has mostly been used to assess customer satisfaction and service quality and its application to skills importance and employee performance has not been observed. The means of importance and performance divide the matrix into four quadrants and the attributes are categorised as minor or major weaknesses and strengths depending on their location on the grid (Deng et. al, 2008). Figure 30 below illustrates the I-P grid and the quadrants.

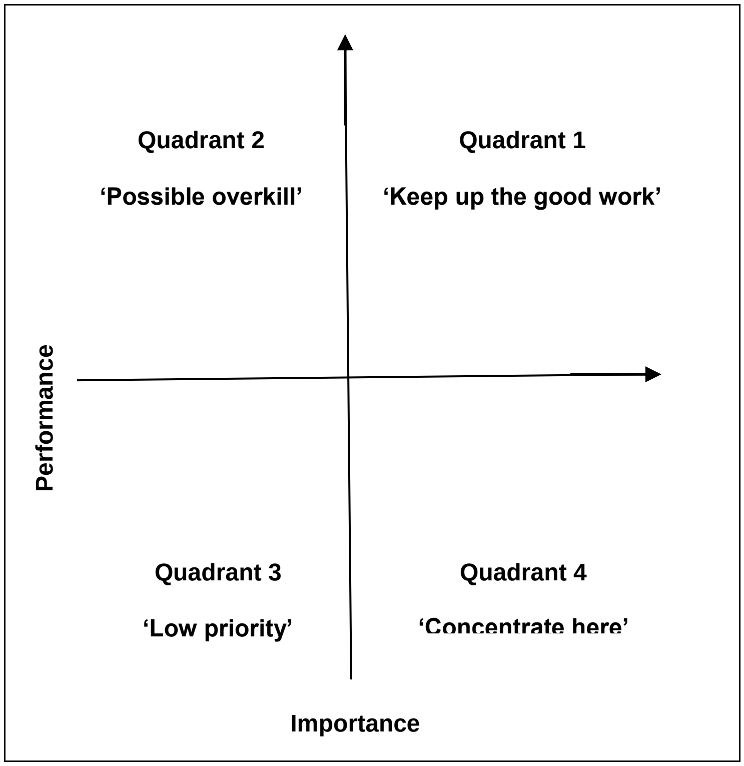


Figure 30: Important-Performance grid (Martilla & James, 1977)

For attributes located in quadrant one both importance and performance are high, therefore are major strengths. The interpretation is 'keep up the good work.' (Martilla & James, 1977). For those in quadrant two, performance is high, but importance is low implying that resources committed to continual improving of performance are being wasted. The interpretation to management here is 'possible overkill.' There is need to re-allocate resources to the development of other important attributes. Quadrant three represents 'low priority' attributes as both importance and performance are low. These are considered minor weaknesses that don't require any additional effort. Attributes in quadrant four represent major weaknesses requiring immediate attention since importance is high, but performance is low. The message to management here is 'concentrate here.' There is need to urgently commit additional resources to improve performance on these attributes as they are regarded as important, but don't meet expectation.

The table below presents the mean score results of the backpacking lodging suppliers I-P analysis. Recall that importance was measured on a 5-point scale: 1 being not important at all and 5 being extremely important. Performance was also measured on a 5-point scale: 1 being poor and 5 being extremely important. The I-P gap is the difference between importance and performance. The I-P gap signals the amount of work needed to be put into performance to meet the level of importance of the attribute to the customer.

Table 15: Mean Scores for the I-P analysis (Supplier perspective)

	Attribute	Importance (I) Measured on a 5-point scale 1: not important at all 5: Extremely important	Performance (P) Measured on a 5-point scale 1: Very poor 5: Excellent	IP Gap (I-P)
1	Friendly staff	4.71	4.29	0.42
2	Safety and security	4.71	4.00	0.71
3	Clean bathrooms	4.57	4.29	0.28
4	Clean beds	4.71	4.57	0.14
5	Overall cleanliness	4.29	4.00	0.29
6	Lockers	3.57	4.00	-0.43
7	Internet access	3.14	4.00	-0.86
8	Pay phones	3.00	3.86	-0.86
9	Medical bay	2.86	2.81	0.05
10	Appearance	3.00	3.14	-0.14
11	Cost	3.86	4.14	-0.28
12	Staff knowledge of local activities and attractions	4.14	3.57	0.57
13	Friendly guests	4.43	3.50	0.93
14	Close to attractions	3.14	3.33	-0.19
15	Close to transport	3.86	3.50	0.36
16	Shuttle transport on-site	3.14	3.71	-0.57
17	Tour booking service	3.86	3.57	0.29
18	Advance booking facilities	4.14	3.43	0.71
19	Parking facilities	3.86	2.57	1.29
20	Laundry facilities	2.86	2.71	0.15
21	Swimming pool	3.29	3.00	0.29
22	Satellite TV	2.14	2.57	-0.43
23	Availability of tourist information	3.57	2.86	0.71
24	Restaurant	2.86	3.00	-0.14
25	Bar	2.86	2.71	0.42

From the table above it is clear that lodging suppliers view their performance much lower than the importance of the attributes. According to the lodging service providers the top most important lodging attributes to backpackers are:

- ❖ Friendly staff, safety and security and clean beds (score 4.71 each out of possible 5)
- ❖ Clean bathrooms (score 4.57 out of possible 5)

- Friendly guests (score 4.43 out of possible 5)
- Overall cleanliness (score 4.29)
- Staff knowledge of local activities and attractions and advance booking facilities (score 4.14 each)

The service providers' best performance is on providing clean beds, with a mean score of 4.57 out of a possible 5. The second best performance attribute is friendly staff (4.29). Overall, the lodging service providers rate their performance lower than they rate the importance of the attributes. This implies that the backpacking lodging service providers acknowledge that their performance on the attributes fall short of customer expectations. On 16 of the 25 attributes (64%) the I-P gaps are positive implying that the service providers are aware that the attributes are more important than their performance on delivering them. It is important to note that this is the suppliers' perspective. Suppliers tend to rate themselves higher than the clients would on the attributes. The findings will, therefore, be confirmed when compared to those from the customers.

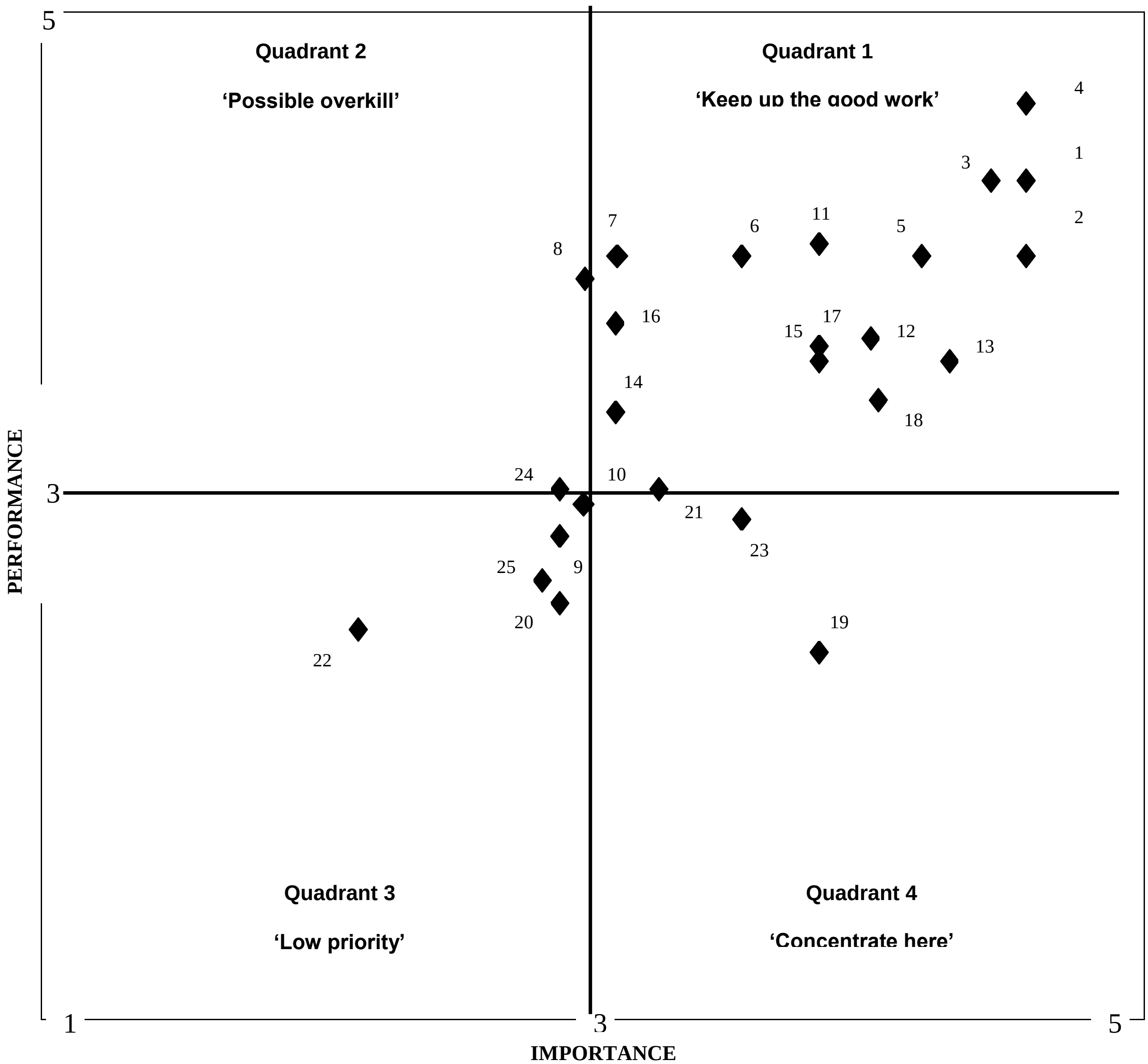


Figure 31: I-P Grid for Cape Town's backpacking lodging sector attributes (Suppliers' perspective)

Figure 31 above represents the I-P grid for the lodging attributes as presented by the lodging providers. The results show that the lodging providers are doing a great job on most of the attributes since most of the attributes are in are located in the 'keep up the good work' Quadrant 1 of the I-P grid. Attributes 8 (pay phones) and 24 (Restaurant on site) are really not that important to customers, but the providers do well on them, therefore, suggesting a possibility of 'overkill' on the part of the service providers. Service providers don't really need to worry much about these attributes with regards to backpacking tourists as they are not that important to them. Attributes 9 (medical bay), 20 Laundry facilities, 22 (Satellite TV) and 25 (Bar) are not that important and the service providers don't do so well on them either. These are low priority weaknesses and should be left alone without any further resource commitment. However, the case is different for Quadrant four ‘concentrate here’ attributes. These are attributes 19 (Parking facilities, 21 (swimming pool) and 23 (availability of tourist information). These are very important attributes to backpacking tourists, but the service providers are not performing up to required standard on these attributes, therefore, should commit resources to improvement of delivery of these to customers. It should be noted, however, that the service providers perform well overall, as only a few of the attributes have performance mean scores below 3. However, these will need to be compared to the ratings from the customers themselves to help the service providers understand where they go wrong or misunderstand customer needs.

Challenges for the growth and development of backpacking tourism in Cape Town

The backpacking lodging suppliers were asked to highlight the main challenges confronting backpacking tourism in Cape Town. Most of the lodging suppliers stated that government commitment was very minimal to lacking, but also acknowledged the interest that was shown by the Department of Trade and Industry (dti) even though they said it was rather brief. Several other challenges in addition to lack of government commitment and support were listed including:

- Lack of marketing domestic and international
- Safety and security/crime
- Lack of marketing support for SMMEs
- Skills development and training
- Lack of networking
- Negative perceptions towards backpacking
- Cape Town winter
- Council and municipal law
- Public misconception of industry

Going forward with backpacking tourism in Cape Town

All the respondents agreed that backpacking tourism is poised for growth in the future. However, the respondents provided several high priority actions to be implemented going forward in-order to grow the sector including:

- Working on changing perceptions about the sector and improve the image
- Provide marketing support to SMMEs
- Improve safety and security
- Standardise laws and regulations (i.e. zoning)
- Sector specific marketing campaigns
- Provide government assistance
- Establish skills development and training programmes

- ❖ Improve communication and networking within the sector

The respondents also stated that the local tourism authorities do several things to facilitate the backpacking sector such as:

- ❖ Providing guidance
- ❖ Market the niche sector
- ❖ Initiate support programs
- ❖ Disseminate information among others.

Overall, the findings from the backpacking lodging suppliers show some optimism about the sector. Their business has been growing, their occupancy robust and outlook positive. However they have significant concerns with regards to the sector that warrant some attention and action from those responsible especially the government and local tourism authorities.

8.1.2 Transport and Tour Operators

Responses from transport and tour operator service providers were very few. Only four valid responses were received out of the expected 30. As a result findings will be discussed as they appear since not much analysis can be conducted with so few responses.

General characteristics of the operators

The tour operators' focus is mostly inbound since all except for one focus on inbound almost 100%. They all own ground transportation and one also owns accommodation. They all specialise in group tours and two also focus on specialised tours. All provide guided tours, two also provide just transport, while two also do hotel and flight reservations. Important to note is that they all except one have documented company emergency policies. The companies seem to be investing in foreign language proficiency as they all offer services in different foreign languages of one kind or the other. The languages mostly mentioned, besides English include:

- ❖ German
- ❖ Spanish
- ❖ Afrikaans
- ❖ Xhosa

Customer-related

All the respondents indicated that their customers are both male and females without much difference between the two. Most indicated that their customers are most young, under the age of 34. However one indicated that their clientele go up to as old as 50 and over and travel mostly in couples, alone and in small group of ten or less. The customers come mainly from Europe, Asia and Australasia, North America, domestic and South America.

The most popular destinations for their clients are Cape Agulhas, Winelands, Cape Point, Table Mountain and Robben Island.

Challenges and priorities for growth and development

The main challenges facing these tour operators include: poor or lack of marketing, obtaining transport permits, growing competition, weather and fuel rates. The mentioned priorities for growth and development include:

- Need for grading system for shark and whale operators
- Strict compliance with standards and high standards for vessels
- Assistance to small operators
- Funding for trade shows
- Sort out the Department of Transport
- Financial assistance from government
- Reduction in crime and improvement of safety.

8.1.3 Attractions/ Language Schools

At the inception of this study, it was anticipated that responses would be received from attractions with respect to niche markets. However, as the study progressed it was evident that this would not be forthcoming. During consultation with BSA (and SAYTC) it was acknowledged that language schools are also an important component of backpacker and youth travel and they were included in the backpacking supply-side survey. There were three valid responses from language schools (there are eight in Cape Town). Findings will be reported as stated by the respondents. Two of the language schools are located in the Central Atlantic Coast region of Cape Town Tourism and one is in the South Atlantic Coast region.

Language school characteristics

Two of the language schools are handicap accessible, but one is not. It is important that language schools are designed to accommodate all kinds of visitors. It is rather disappointing to note that all the participating language schools indicated that they had no environmental protection and sustainability policies. It is now of critical importance for all tourism products and service providers especially those that attract visitors that are interested in nature and nature-based activities to have environmental protection and sustainability policies and plans in place. Today's tourists have become environmentally conscious and those products and service providers that show their commitment to sustainability will be sustainable. All three attractions are open all year round and as would be expected all get the bulk (90%+) of their business in Summer. However, it is important to note that business doesn't drop much for the low seasons either. For the other three seasons the attractions operate at between 70-90% capacity, which is rather impressive. The fact that they are open all year round and operate at greater than 70% capacity during the low seasons is an indication of good business and a point towards combating the seasonality challenge.

Two of the language schools offer a great variety of activities shown in Table 16 below. One of the them offer a few of these including: hiking, wildlife viewing, bungi jumping, cage diving, souvenir shopping and dining. While there are only a few language schools, it is it clear that they have a market that is interested in Cape Town's offerings. Moreover, it is apparent that Cape Town has no shortage of offerings. It is impressive that if only two language schools can offer all these kinds of tourist and recreational activities, the implication is that there is plenty for tourists to do in Cape Town. The respondents themselves agree that there are sufficient activities and attractions for tourists to participate in Cape Town.

Table 16: Activities offered by the attractions

Land-based	**Water based**	**Other**
Hiking	Swimming	Shopping (souvenirs)
Mountaineering	Canoeing	Equipment rental
Bicycling	Cage diving	Picnicking
Quad-biking	Rafting	Restaurant (dining)
Hunting	Kayaking	Events hosting
Wildlife viewing	Boating	
Bird watching		
Camping		
Bungi jumping		

Customer related

All three respondents agree that there is no difference in participation based on gender. Participation at their language schools comes from both males and females alike. They also concur that most of their customers are young, under the age of 25.

Europe also tops the list of source markets of business for the attractions. However, one of the attractions gets the bulk (60%) of its business from the African market, a finding that is not consistent with those from the other attractions. The reason might be that since the business is in edu-tourism, therefore, tends to have more African youth, as Cape Town is viewed as a great education destination in Africa and South Africa due to its high concentration of high quality institutions of higher learning. On the other hand western tourists tend to come mainly for holiday and not so much for education as they perceive their education to be of higher quality, however Cape Town (and South Africa) offers them an attractive destination to master English as a foreign language. Figure 32 below shows the percentage of business/visitation that comes from each market to the language schools in a year.

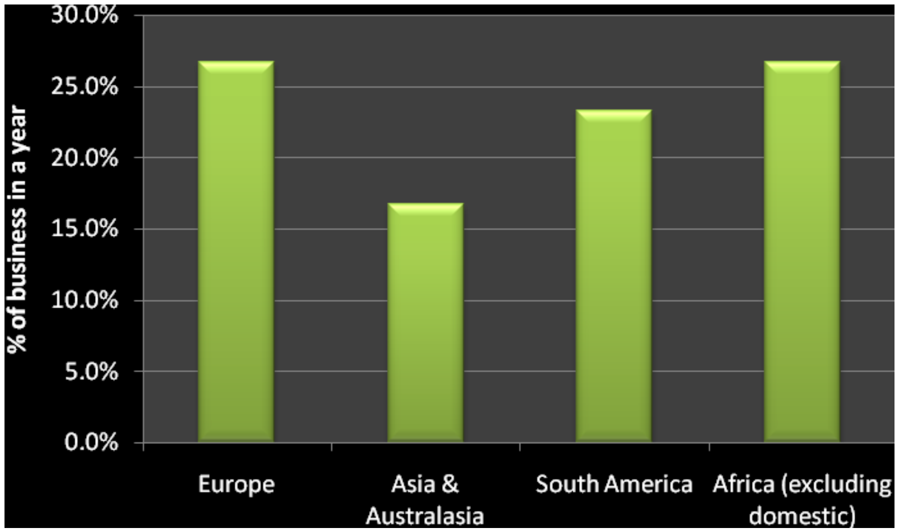


Figure 32: Sources of business/visitation to the attractions in a typical year

Challenges

The respondents stated that their businesses are definitely on a growing trend and have been for the past three years. This is a positive finding as it illustrates the great potential of the niche sector. However they stated several challenges they encounter that work against their growth and development goals. These challenges include:

- Lack of awareness of their sector
- Safety and security and crime
- Negative South Africa reputation abroad
- Competition from other destinations
- Lack of government recognition and support
- Visa regulations
- No standard regulation as they currently self regulate
- Lack of exposure from SAT
- Shortage of cheap accommodation options

The following is a list of what the respondents consider as top priority issues to be addressed in-order to grow visitation and participation at their attractions:

- Government recognition
- Improve visa regulations
- Invest in up-skilling staff
- International marketing and improved exposure by SAT

- Positive branding of South Africa

The findings from the language school suppliers mimic what has been said by the other suppliers, especially with regards to challenges and priority setting going forward. However, they also seem to agree that there is growth in the niche sector and more growth is yet to come.

8.2 Demand-side

8.2.1 Primary research findings from the 'Have-visited' group

Stratified sampling was utilised at this stage to include a fair representation of domestic and international backpacker tourists as these are two completely different markets with different travel patterns, needs and demands. Under each stratum, both those that have and have not visited Cape Town would be included. Those that have visited would provide critical information to enable the assessment and evaluation of the performance of the industry from an experienced tourist's point of view. Those that have not visited Cape Town, but have visited other backpacker destinations would provide invaluable insights into why they chose not to visit the destination in favour of others. The study targeted a total of 250 respondents, 150 international and 100 domestic. The international respondents were divided 50:100 'not visited' to 'have visited' ratio. Domestic respondents were split 30 (not visited):70 (visited).

The response rates from this section of the study were also very low, despite several interventions carried out to increase the response rate. The highest response rate came from the international 'have-visited' group. At the time of compiling this report there were only three responses from the 'have-not-visited' group, both domestic and international and very few domestic 'have-visited' responses. This section of primary data analysis will therefore concentrate mainly on the 'have-visited' group.

Demographics

Gender and Age

Of the 88 valid responses 40% were male and 39% female. The remainder didn't state their gender. The finding is quite consistent with the pattern that has been established in this study before that participation in backpacking doesn't vary by gender. Both males and females can equally be backpackers. The largest age group was the 25 to 29 representing 39.8%. The second largest age group was the 20 to 24 group. This confirms the fact that backpacking is mainly a young adults' niche sector since about 68% of all the respondents were under the age of 30. There, however, were a good number of the 40 to 49s (6.8%). Figure 33 below represents the age distribution of the backpackers.

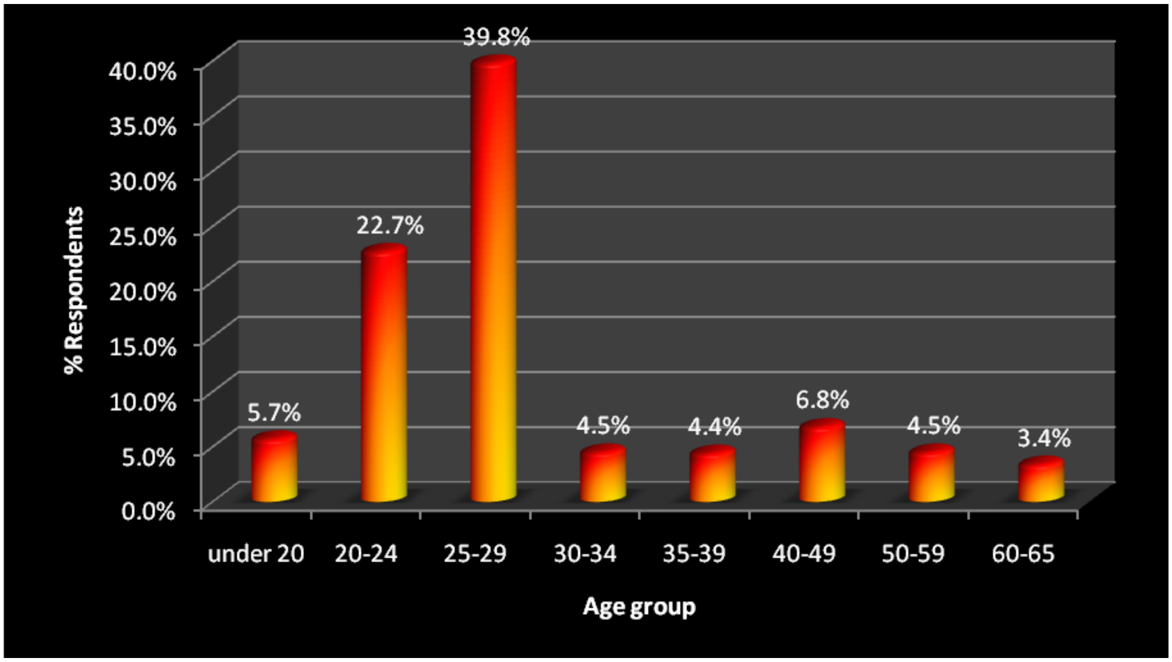


Figure 33: Age distribution of the respondents

Ethnicity and origin

The backpackers were predominantly white (68.2%), a few Asians (4.5%) and Hispanics (3.4%). Blacks and Pacific Islanders represented a small proportion of 2.3% each. Explaining the ethnic finding was the fact that the backpackers were also predominantly from Europe (64.7%), with a few from Asia and Australasia (10.6%), North and South America (8% each). Domestics and Africans represented only 4.5% and 3.4% each respectively. The UK was the single largest source country (28.2%) followed by Germany and Brazil (7.1%) each. This finding is very consistent with the general trend of tourism in Cape Town. The UK and Germany are the largest two source markets for international tourists to Cape Town. Other top source countries included:

- USA
- Australia
- France
- Denmark
- Netherlands
- South Africa

Education and Income

The single largest group of the respondents was out of school and employed (61.4%) followed by students (20.5%). Only 4.5% were retired. The results suggest that backpackers are well educated as about half (50.4%) of the respondents had attained an undergraduate degree and 27.3% had attained a postgraduate degree. Only about 3.4% were still in school studying towards their undergraduate degrees. Figure 34 below illustrates the educational background of the respondents.

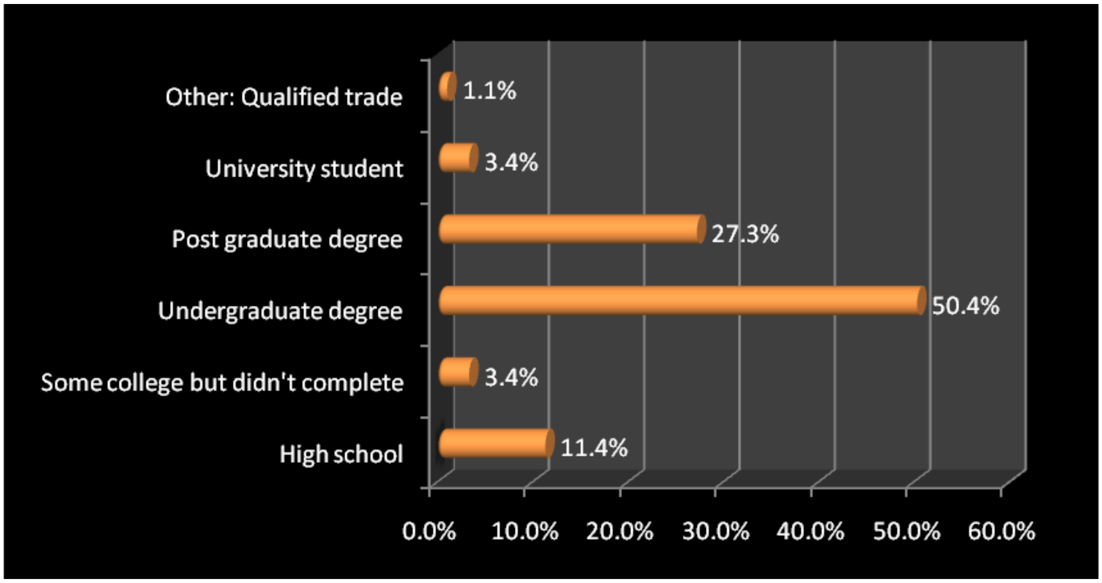


Figure 34: Educational qualifications of the respondents

This result is important as it shows that backpackers are generally highly educated contrary to the belief and perceptions that are normally attached to them that seem to suggest otherwise.

Monthly income results show that about 26% of the respondents earn between US$1 000 and $2 000 a month and about 19% earn below US$1 000 a month. A significant proportion earns over US$ 2 000 (refer to Figure 35). While the single largest group was the US$ 1 000 to $2 000, there were significantly high percentages of middle to high income backpackers as well. This finding, does, to an extent refute the commonly believed myth that backpackers are low income students. The WYSET (2008) recent study showed some changing demographics of the backpacking and youth travel market, with an increase in higher income and older participants. This study seems to confirm the WYSET findings and also disconfirm the misconception that backpackers are low income students.

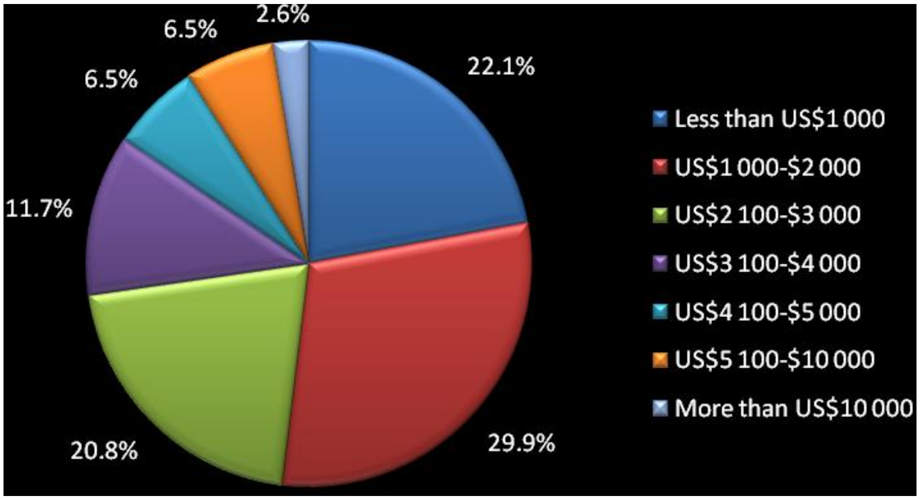


Figure 35: Monthly income

Travel patterns and characteristics

Travel motives and purpose

Before analysing the visitor characteristics, it is critical to understand the underlying motives of backpacking visitors. It is important to know that which drives them to decide to take a trip in the first place as well as their main purpose of visits. Figure 36 below shows the underlying motives of the respondents to take a trip to Cape Town. It seems from the results that most of the backpackers travel driven mainly by their desire to explore new places and to learn about other places and cultures. This is an important finding especially so as it pertains to destination marketing, as it is critical to know what drives people to travel in order to be able to communicate to them that our destination can satisfy that which they are looking to satisfy within themselves.

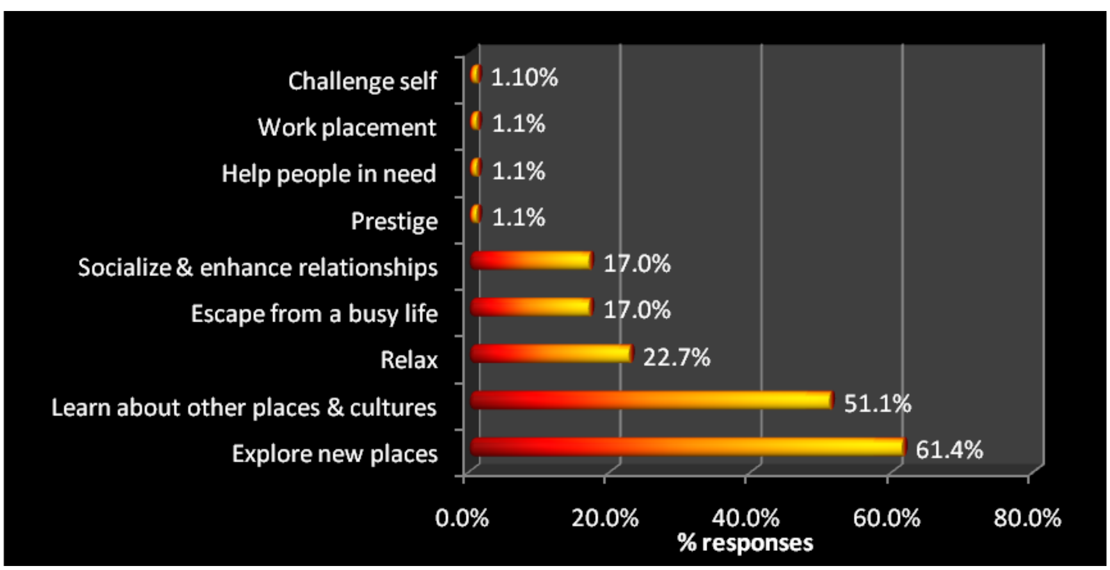


Figure 36: Underlying motive to travel (*Totals will be greater than 100% due to multiple responses)

Other important underlying motives include:
- To relax
- To escape from a busy life
- To socialise and enhance relationships

On the main purpose of visit, holiday (69.3%) was mentioned as the top most purpose followed by visiting friends and family (11.4%) and volunteerism (10.2%). Other purposes mentioned include:
- Business (6.8%)
- Attending a conference (4.5%)
- Sport event (4.5%)
- Shark diving (2.3%)
- Study (4.5%)
- Field-work and internship (1.1% each)

It is important to note that underlying motive and purpose, though very close are not one and the same thing. While, holiday is listed as the main purpose of travel, motive is what drives the visitor to take the holiday. Motives are, therefore more important for the destination marketer to understand as they are what drives the purpose. One decides to travel for holiday, or visit friends and relatives or attend an event to satisfy an underlying need which is the motive.

Trip planning

The study findings suggest that backpackers do take considerable amount of time planning their trip. The amount of time taken to plan the trip ranges from a couple of weeks to three years. However, the average length of time between decision and visit was 5.58 months. The North Americans had the longest average length of time of 7.11 months followed by those from Asia & Australia (6 months) and Europeans (5.6 months). This finding could be because Cape Town is a long haul destination for most of the tourists coming from Europe, Asia and the Americas, therefore it takes considerable amount of time to plan and organise the visit. The figure below shows the distribution of the amount time between when the visitor decided on Cape Town and the actual trip. The trip planning time could be longer given that planning doesn't only always start once a destination has been selected. It also occurs during the destination selection process. It is of critical importance, however, to note that most destination selection decisions are made between three months to a year before travel. Destinations, therefore, need to synchronise their marketing activities with the customers' destination decision making timing.

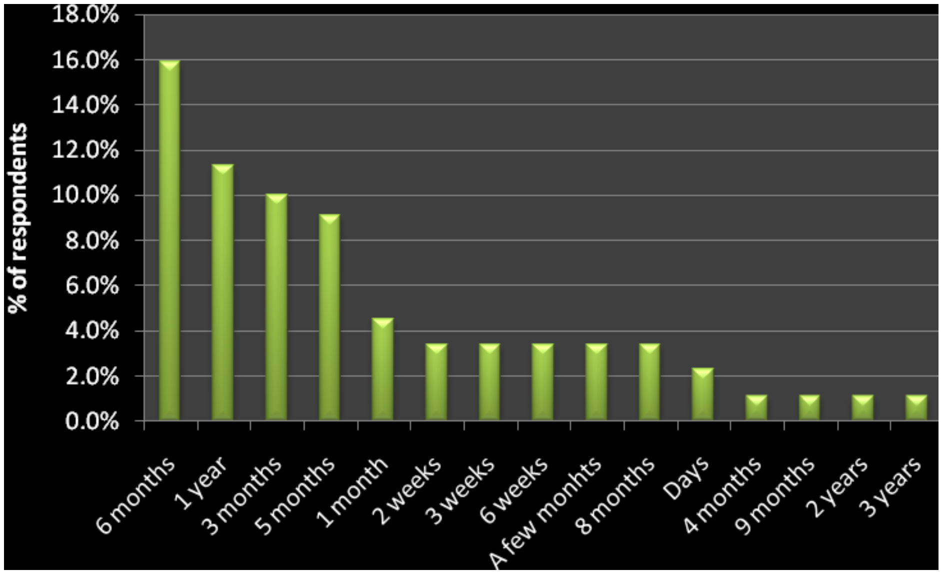


Figure 37: Time between destination selection and travel

The majority (71.6%) of the backpackers planned their trips alone, while 18.2% utilised a travel agent for their trip planning. This result is consistent with other studies that have been done in other destinations, that show that backpackers prefer not to be tied to a fixed schedule, therefore, they do most trip planning on their own. Those that received help with trip planning used some of the following:

- African Trails
- Baz bus
- STA
- School
- University
- NGOs

Sources of Information during trip planning

The visitors used different sources of information during their trip planning. The majority (68.2%) used the Internet, some used friends and family (34%) and guide books (26.1%). There were several other important sources of information used by the visitors when planning their trip (refer to Figure 38). It is clear that the Internet is the single most important source of information used by the visitors when planning their trip. However, word of mouth and the traditional books and magazines are still quite relevant.

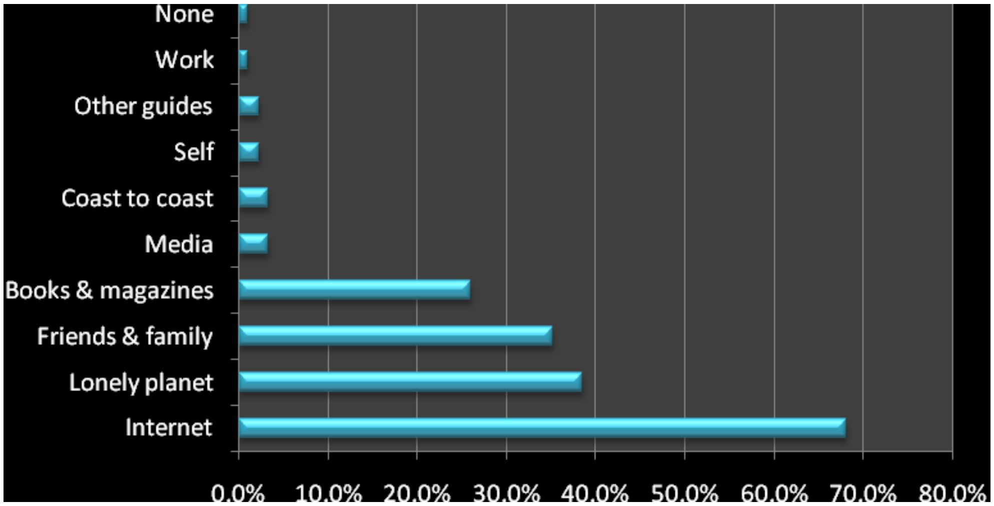


Figure 38: Main sources of information during trip planning

It is interesting to note that, when asked about they heard about Cape Town, most (68.1%) stated that they already knew about it. About 37.5% heard about it through friends and relatives while 18.2% heard about it through books and guides. Figure 39 presents the different methods through which the backpacking tourists learnt about Cape Town.

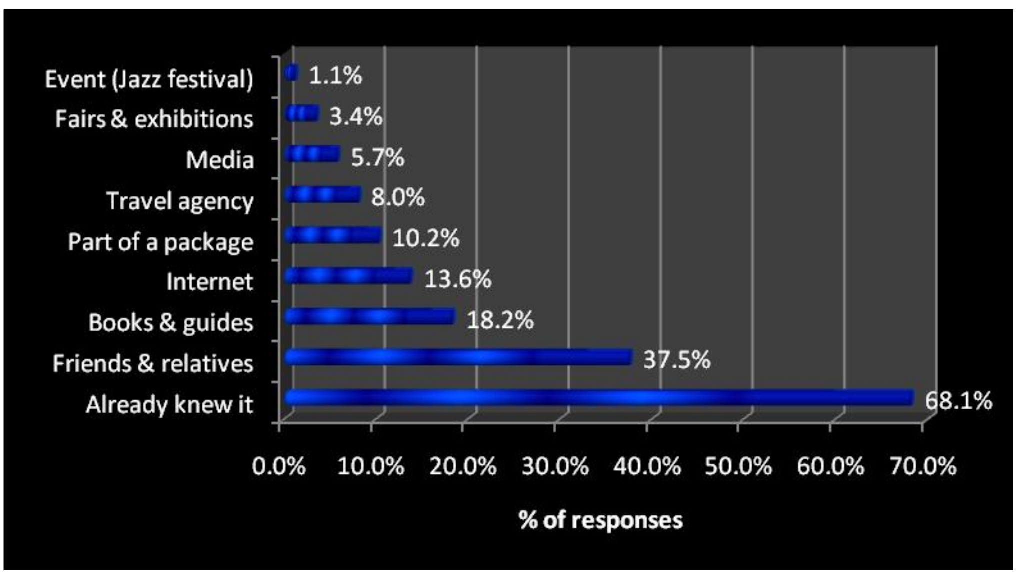


Figure 39: How the backpackers heard about Cape Town

It is interesting to note the drastic reduction of the internet's role when it comes to how the respondents heard about Cape Town. What this implies is that people use the Internet to actively search for information on the destination they have already heard about from other sources such as friends and family. Guide books play a particularly important role in this regard surpassing both the Internet and media.

Within destination travel patterns

Repeat visitation and travel group size

For most of the respondents (63.1%) it was their first time to visit Cape Town. About 13% had visited Cape Town two times and 9.3% three times. The average number of repeat visitation was 2 (1.8). The high percentage of first time visitors agrees with the underlying motives of backpacking tourists. Exploring new places and learning about other places and culture were the two most important underlying motives for travel, therefore it would be expected that most backpackers would be first time visitors. They move on to explore and discover other new places once they have visited. Analysing repeat visitation by origin of the tourists showed that domestics had the highest repeat visitation of 4.5 (Table 17). Europeans and those from Asia and Australasia have repeat visitation rate of about 2 each.

Table 17: Repeat visitation by origin region

Origin region	Average number of times one has visited Cape Town in the Past five years
Europe	1.66
Asia & Australasia	1.67
South America	1.33
Domestic	4.50
North America	1.29
All	1.80

The average travel group size was 5, but the most common was one; 31.6% of the respondents travelled alone and 22.8% travelled as couple. A few were in groups of four and more (refer to Figure 40).

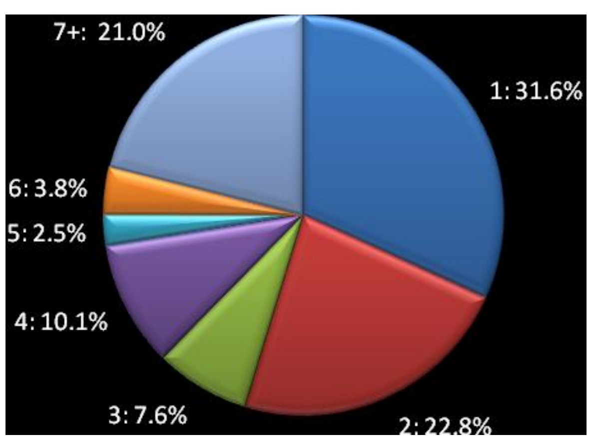


Figure 40: Travel group size

There was a significant percentage of those travelling in groups of seven and greater. This is due to the large bus group tours. Only 5.6% had children of 18 and under in their travel group, most (94.4%) travelled without children.

Mode of transport and accommodation choices

Air transportation (61.4%) was the main mode of transportation to Cape Town, followed by bus (20.5%) and personal car (11.4%). About 8% travelled to Cape Town by overland truck. The most common mode of transport within the destination was rental car (73.9%), followed by foot (44.3%), public transport (31.8%), metered taxi (29.6%) and tour buses (19.3%). About 3.3% of the respondents used a friend's car.

The majority (88.6%) used backpacker hostels for accommodation during their trip to Cape Town. A few used friends and relatives accommodation (8%), hotels (5.7%), home-stays (6.8%) guest houses (4.5%) and others (refer to Figure 41).

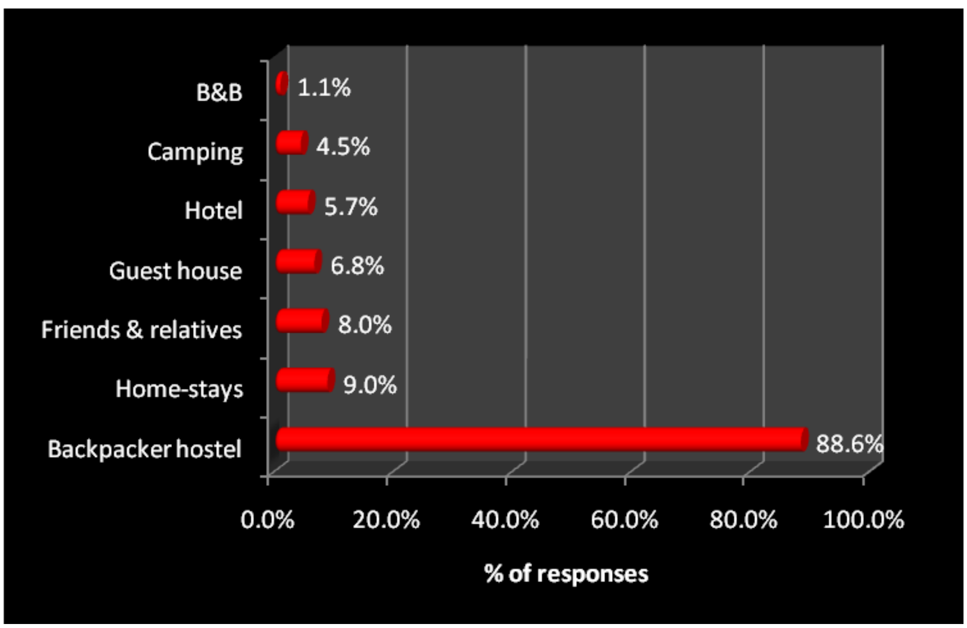


Figure 41: Accommodation choices (*totals will be more than 100% due to multiple responses)

The single most common area/suburb that the backpackers stayed during their trip to Cape Town was the city centre followed Gardens. A few stayed at Table View, Green Point and others (refer to Figure 42).

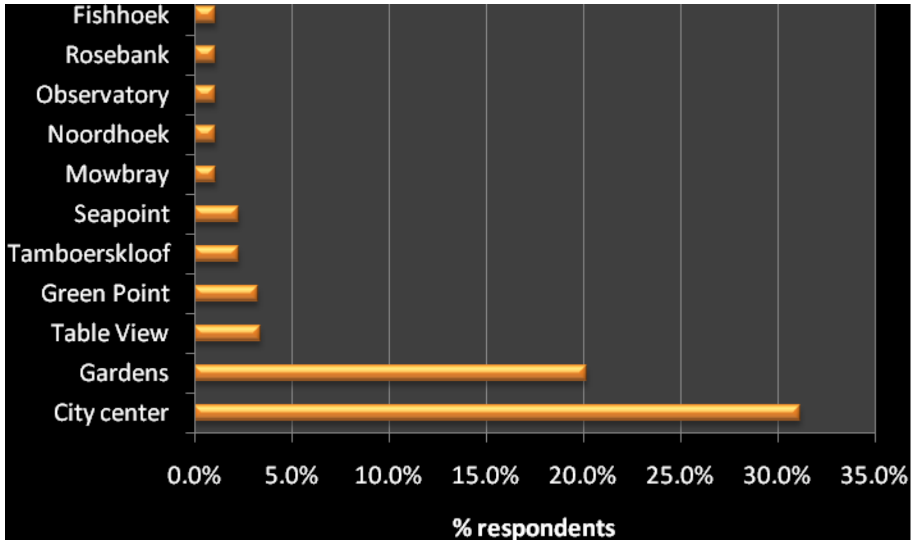


Figure 42: Suburb in which the backpackers stayed during their trip

The city centre choice of accommodation is consistent with the backpackers within destination mode of transport. About 44% of the tourists stated that their main mode of transport within the destination was foot in line with their choice of accommodation area. Tourists want to be close to the focal area of their activities where they can reach by foot.

Asked about their main reason for choosing the type of accommodation they did, most (75%) cited cost as the main motivator. This suggests that backpackers are a price sensitive type of tourists. Other reasons cited included:

- Accessible location (44.3%)
- Community spirit (27.3%)
- Youth dominated (22.7%)
- Activity location (15.9%)
- Informality (15.9%)

These cited reasons are very important to backpacking accommodation providers as it highlights to them why the tourists chose some places in favour of others. Backpackers don't like the formal nature of hotels and other more upmarket accommodation types and they also like the community spirit of the backpacking hostels.

Length of stay and Spend

The average length of stay of the backpacker tourists in Cape Town was 10.72 nights and the most common was 7 nights, the minimum, 2 nights and the maximum was 49 nights. Table 18 below shows compares the length of stay by origin region of visitor. The longest length of stay in

Cape Town was that of European backpackers followed by Asia and Australasia visitors. It is important to note that these are length of stay in Cape Town only not for the entire trip in South Africa. Tourists travel to different places in the country and spend their nights in those different places during their entire trip. It is also important to note that some of the groups were rather small, therefore, these regional comparisons should be taken as an indication of the different groups' length of stay.

Table 18: Length of stay by origin region

Region of origin	Length of Stay (number of nights)
Europe	11.7
Asia & Australasia	8.2
South America	11.5
Domestic	7.8
North America	8.0
All	10.7

The average total spend of the backpackers in Cape Town was R7 743. The backpackers spend the most on accommodation than any other category followed by food and beverage. Tourists from Europe were the highest spenders across all categories. Table 19 shows spending by category of spending and origin region of tourists. There were too few spending responses from respondents from other regions to do comparisons. Tourists spend a lot more on shopping than they do on within destination transportation.

Table 19: Spend by origin region and category of spending (Rands)

Region of origin	Total Spend	Accommodation	Food & Beverage	Within destination Transport	Entertainment	Shopping
Europe	7 664.76	1 825.08	1 812.50	672.87	917.17	1 035.64
Asia & Australasia	6 500.00	644.25	852.86	262.57	808.57	1 530.86
All	7 737.27	1 474.60	1 544.28	634.94	987.72	1 148.94

*Category spending doesn't add up to total spending due to other spending categories not reported.

Attractions and Activities

The tourists visit a wide range of attractions in Cape Town, but the most popular were Table Mountain (76.1%), V & A Waterfront (75%), Cape Point (70.5%) and others. Figure 43 shows the percentage of visitation to the different attractions by the tourists in Cape Town. Table Mountain was clearly the most visited attraction followed by the V&A Waterfront and Cape Point. A significant percentage also visited townships (28.4%) and wine estates (51.1%), thereby promoting spread of tourism benefits across different sectors and geographic areas.

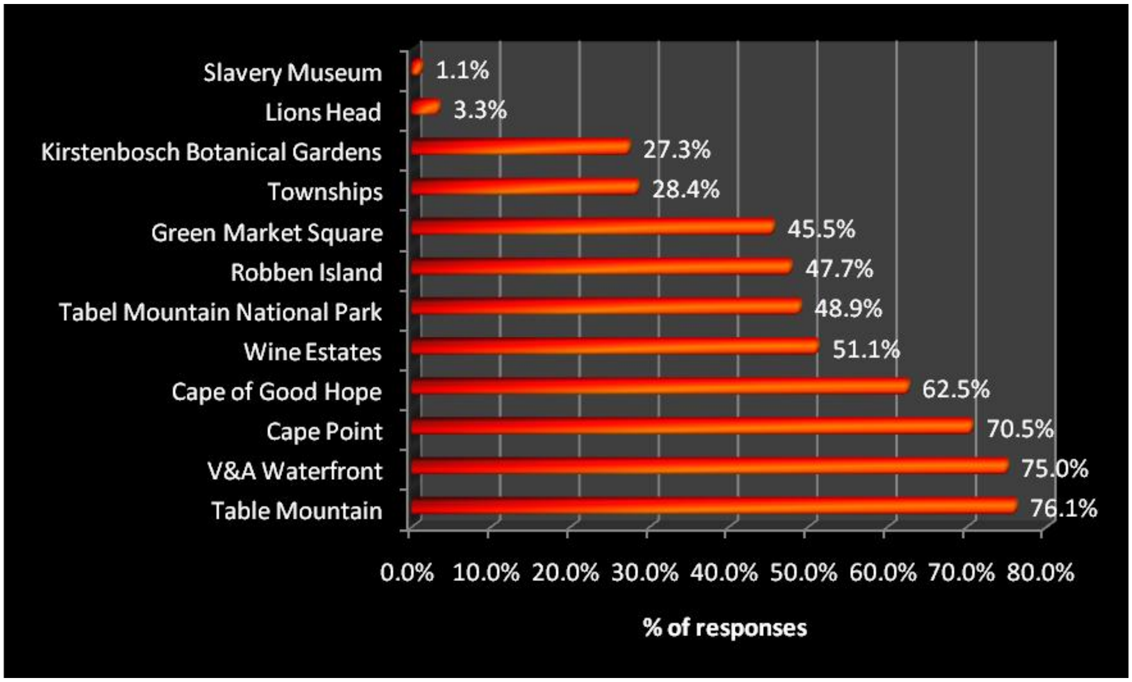


Figure 43: Attractions visited by backpackers in Cape Town

The tourists participated in equally diverse activities. Table 20 shows the percentages of participation in different activities by the backpackers in the destination. Shopping seems to be an important activity across all tourist types as it also most popular with non-backpackers. Visiting museums and historical sites, clubbing and township tours were also quite popular. In addition, nature and adventure-type activities were cited frequently as well..

Table 20: Activities participated in

Activity	**Percentage of participation**
Shopping	68.2%
Visiting museums & historical sites	64.8%
Visiting natural sites	62.5%
Clubbing	44.3%
Wine tours	47.8%
Hiking	36.4%
Township tours	27.3%
Whale watching	17%
Game viewing	14.8%
Shark cage diving	8%
Biking	9.1%
Surfing	3.3%

There are several other adventure-type activities that the backpackers participated in, though by fewer people including:

- ❖ Abseiling
- ❖ Paragliding
- ❖ Cage diving
- ❖ Diving
- ❖ Motorcycling

Competition

It is of particular importance to understand the destination's competition when it comes to global tourism. The respondents were, therefore asked to name other destinations they had on their consideration set when they were deciding to visit before they settled for Cape Town. Several other destinations were mentioned both internationally and domestically. Figure 44 below shows other international destinations that were considered by the backpackers during their decision making before they settled for Cape Town. South America, Australia and the USA were the leading contenders, however, not by a significant percentage.

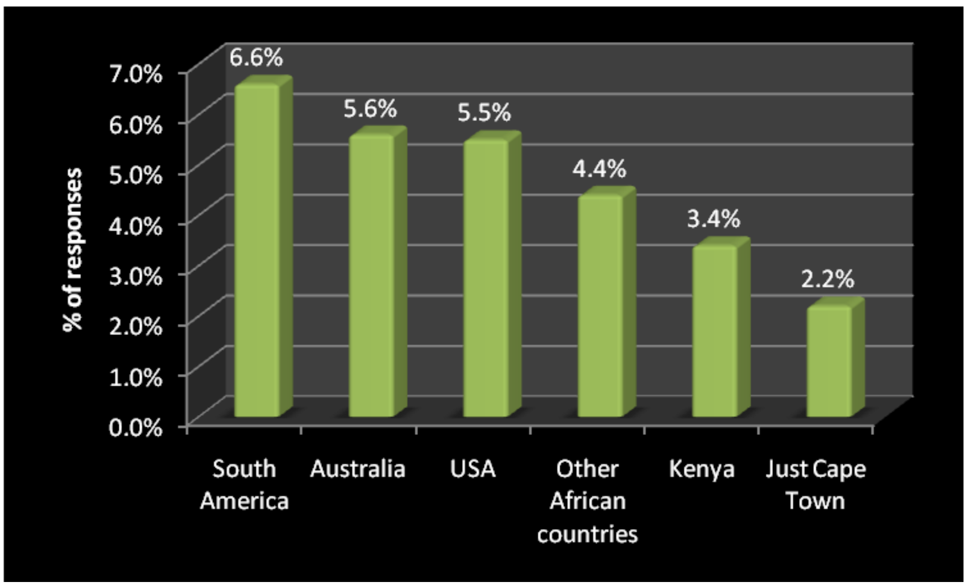


Figure 44: Other international destinations considered before settling for Cape Town

Other destinations mentioned included (1% each):

- ❖ Tanzania
- ❖ Botswana
- ❖ Namibia
- ❖ India
- ❖ Nepal
- ❖ Bolivia
- ❖ Peru
- ❖ Mozambique
- ❖ Thailand
- ❖ Bali and
- ❖ Cuba
- ❖ New Zealand
- ❖ Japan

- ❖ Denmark

It is also of particular important to note that some backpackers (4.5%) indicated that the Cape Town trip was part of a long African overland trip that included several countries.

Several other domestic destinations were also considered before settling for Cape Town. These include:

- ❖ Johannesburg (4.5%)
- ❖ Garden Route (2.3%)
- ❖ Mpumalanga, Limpopo and Port Elizabeth (1% each)

While several other destinations were mentioned, no single destination particularly stood out as a major threat to Cape Town. However, the finding that a good percentage of backpacker tourists to Cape Town visit on a prolonged African tour signals the importance of partnerships and joint marketing initiatives with other surrounding African destinations. In fact about 20% of the respondents indicated that they had visited other African countries on their way to Cape Town.

Perceptions and Satisfaction

The respondents were asked about their perceptions on a number of attributes prior to their visit to Cape Town and also to rate their level of satisfaction on the same set of attributes after the visit. The findings were rather interesting as they showed that the tourists' perceptions prior to visitation were worse than their actual experiences. In other words, the tourists were more satisfied than they anticipated before their visit. Table 21 below compares the mean ratings of perception prior to visiting versus satisfaction after visitation. On all the attributes, including even safety and security the tourists were more satisfied than they anticipated prior to visiting. This finding, while it is good that delivery surpasses expectations, it is rather disturbing as it confirms at the same time, that potential tourists have terrible perceptions about the destination. Destination marketers have a challenging task addressing this perception issue as, it can result in loss of business as potential tourists chose other destinations they perceive to be better. However, there are two issues that need to be dealt with as they were rated just slightly above average on satisfaction. These attributes are: Public transportation and personal safety and security.

Table 21: Perception vs. Satisfaction

Attribute	Perception score Measured on a 5-point scale 1: Poor 5: Excellent	Satisfaction score Measured on a 5-point scale 1: Very dissatisfied 5: Extremely satisfied
Service delivery	3.59	4.04
Accessibility	3.57	4.09
Quality of accommodation	3.58	4.23
Overall cleanliness	3.43	4.22
Friendliness of the people	3.85	4.40
Public transportation	2.98	3.17
Quality of infrastructure	3.26	3.65
Personal safety	2.65	3.33
Availability of information	3.70	4.07
Diversity of attractions	4.09	4.39
Value for money	3.75	4.00
Availability of activities	4.00	4.26
Availability of shopping facilities	3.75	4.26
Quality of restaurants	3.75	4.32
Customs & immigration	3.24	3.70

There were no much significant differences by origin region. Both the perception and the satisfaction ratings were pretty much consistent across the regions. The following figure is a visual graphical representation of these perception/satisfaction anomalies. Destination marketers need to capitalise on this discrepancy to change perceptions about the destination by highlighting and pushing the message that tourists' experiences in the destination always disconfirm their preconceptions.

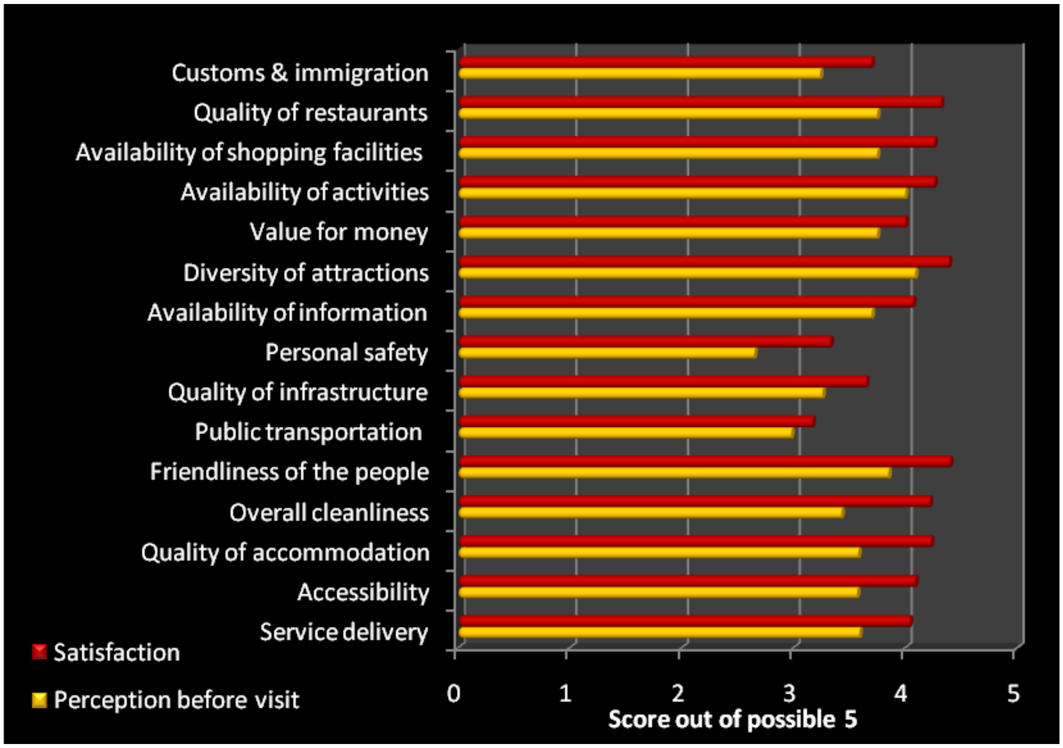


Figure 45: Perception vs. Satisfaction

The only attribute that scored above four on perception was 'diversity of attractions,' yet many (60%) scored above four on satisfaction, implying that the poor perceptions about the destination are almost always disconfirmed by the experiences.

Two most important measures of satisfaction and loyalty are intention to revisit and recommendation of destination to friends, family and colleagues. Over two thirds (71.6%) indicated that they would consider visiting Cape Town again in the future, while 80.8% said they would recommend Cape Town to their, friends, family and colleagues. This finding solidifies the satisfaction ratings discussed earlier as they reiterate the satisfaction the tourists had with the destination.

Most and least enjoyed

Table Mountain was the single most enjoyed thing in Cape Town by the backpackers. Interesting, was that 9.1% mentioned that they enjoyed everything. Figure 43 illustrates the top most enjoyed things.

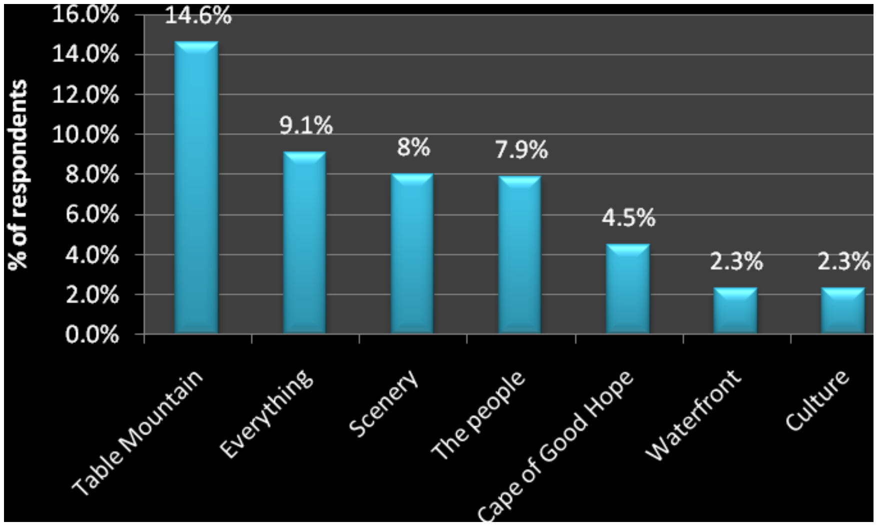


Figure 46: Most liked things about Cape Town

Other things mentioned included:

- Diversity of activities
- Museums and theaters
- Nightlife
- Robben Island
- Beaches
- Ocean

Crime, safety and security (30.6%) were the least liked things about Cape Town by the respondents (refer to Figure 47). There were a few other items mentioned including:

- Noisy accommodation
- No terraces to sit on
- Racist nature of the Afrikaans people
- High taxi fares
- The queue at Table Mountain cable car
- Traffic congestion
- Too touristic

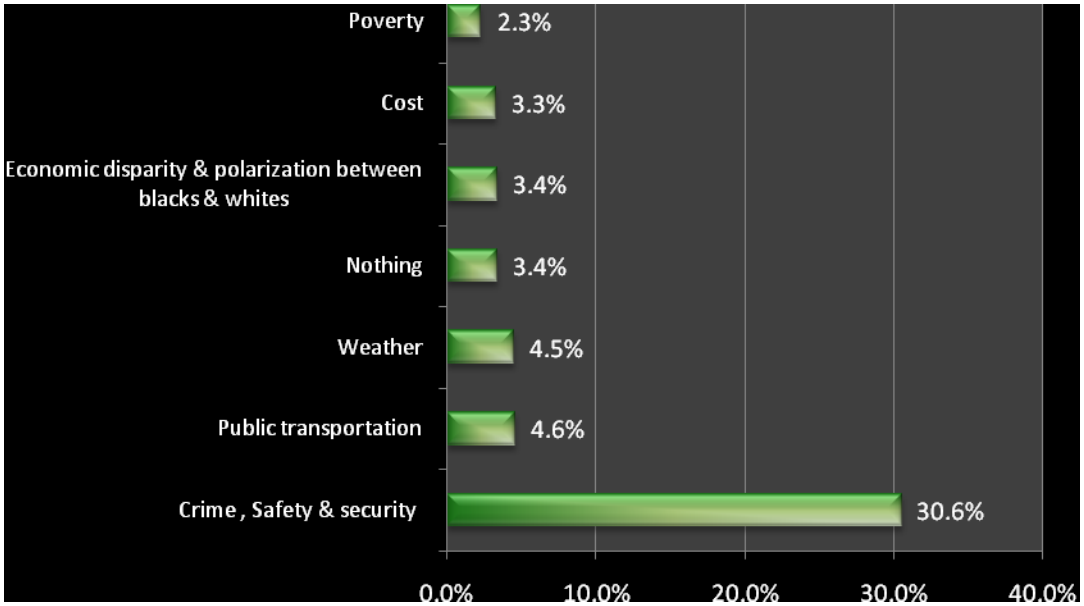


Figure 47: Least liked about Cape Town

Importance Performance

This section presents the importance-performance analysis of the accommodation attributes from the tourists' viewpoint. The most important attributes to the tourists were their safety and security (score 4.52), clean beds (score 4.49), friendly staff (score 4.38) and clean bathrooms (score 4.28) in that order (refer to Table 22). The least important attributes were satellite TV (score 2.32), payphones (score 2.51) and swimming pool (score 2.56). Important to note, however, is the I-P gaps which show that service providers almost always exceed requirements of the tourists as most of the gaps (20 out of 25) were negative implying that service provider performance mean scores exceeded tourists importance mean scores on most attributes. The only five attributes on which performance didn't meet tourists' requirements were:

- Safety and security
- Clean bathrooms
- Clean beds
- Overall cleanliness and
- Cost

Cleanliness issues seem to be the dominant problem areas.

Table 22: Importance-Performance analysis of attributes from the tourists' viewpoint

	Attribute	**Importance (I) Measured on a 5-point scale 1: not important at all 5: Extremely important**	**Performance (P) Measured on a 5-point scale 1: Very poor 5: Excellent**	**IP Gap (I-P)**
1	Friendly staff	4.38	4.39	-0.01
2	Safety and security	4.52	3.74	0.78
3	Clean bathrooms	4.21	4.05	0.16
4	Clean beds	4.49	4.24	0.25
5	Overall cleanliness	4.16	4.13	0.03
6	Lockers	3.54	3.77	-0.23
7	Internet access	3.69	3.72	-0.03
8	Pay phones	2.51	3.49	-0.98
9	Medical bay	2.58	3.13	-0.55
10	Appearance	3.41	4.21	-0.8
11	Cost	4.26	3.88	0.38
12	Staff knowledge of local activities and attractions	4.07	4.20	-0.13
13	Friendly guests	3.84	3.86	-0.02
14	Close to attractions	3.83	4.03	-0.2
15	Close to transport	3.89	4.07	-0.18
16	Shuttle transport on-site	3.10	3.56	-0.46
17	Tour booking service	3.23	4.10	-0.87
18	Advance booking facilities	3.33	3.93	-0.6
19	Parking facilities	2.67	3.40	-0.73
20	Laundry facilities	3.38	3.71	-0.33
21	Swimming pool	2.56	3.27	-0.71
22	Satellite TV	2.32	3.20	-0.88
23	Availability of tourist information	3.73	4.23	-0.5
24	Restaurant	3.04	3.67	-0.63
25	Bar	3.79	4.03	-0.24

Figure 48 below is the graphical presentation of the I-P results from the tourists. Performance score were higher than importance scores for all the attributes except for those in a blue border. This is extremely important as it signals to the service providers that they are meeting the requirements of their customers on the majority of the attributes that are important to them.

However, the few that didn't meet requirements should not be overshadowed by the positives and should be treated as weaknesses needing attention.

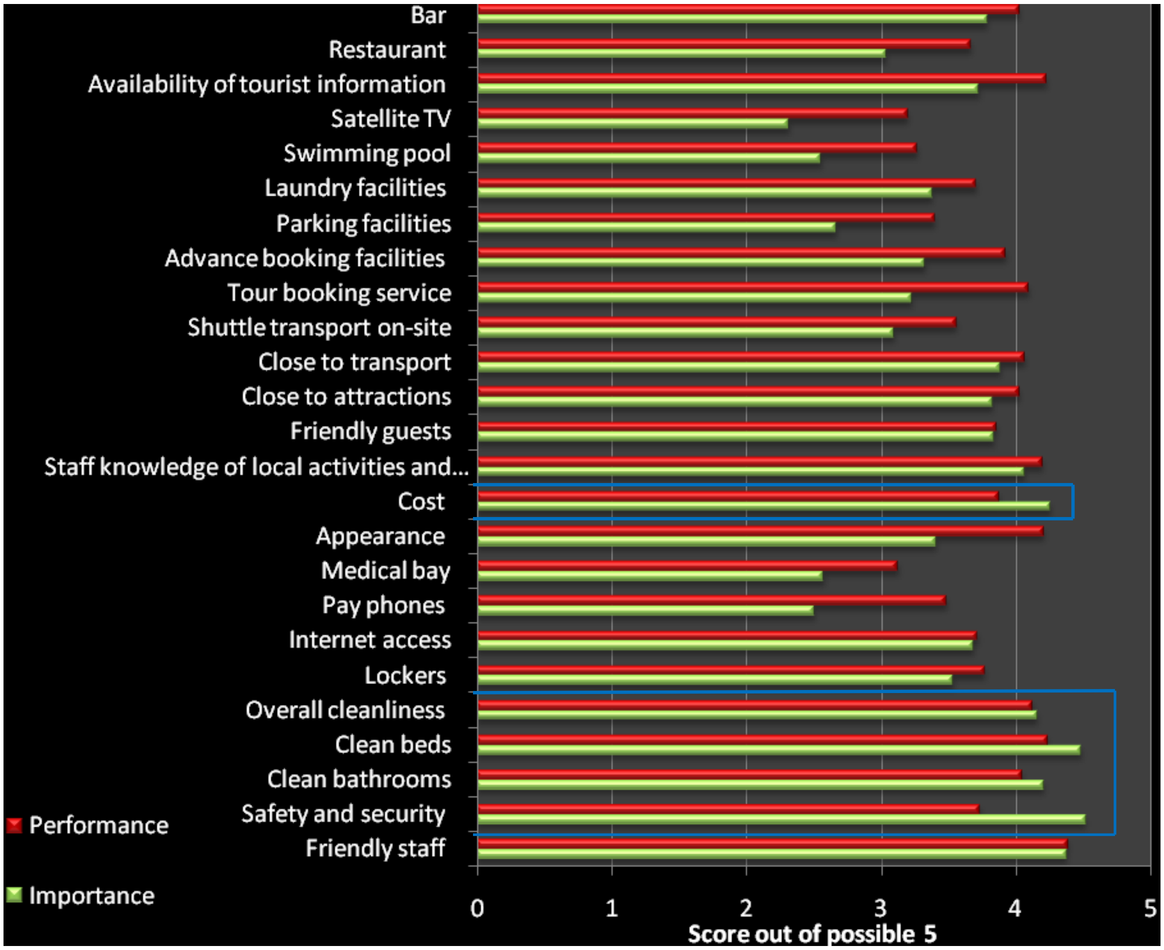


Figure 48: I-P of tourists

A comparison of the providers' and tourists' performance ratings shows that providers tend to overestimate both the importance of the attributes to the tourists and their performance on the attributes. Table 23 compares the I-P mean scores of the service providers and the tourists.

Table 23: A comparison of I-P scores of suppliers and tourists

	Attribute	Importance (I) Measured on a 5-point scale 1: not important at all 5: Extremely important		Performance (P) Measured on a 5-point scale 1: Very poor 5: Excellent	
		Providers' viewpoint	Tourist viewpoint	Providers' viewpoint	Tourist viewpoint
1	Friendly staff	4.71	4.38	4.29	4.39
2	Safety and security	4.71	4.52	4.00	3.74
3	Clean bathrooms	4.57	4.21	4.29	4.05
4	Clean beds	4.71	4.49	4.57	4.24
5	Overall cleanliness	4.29	4.16	4.00	4.13
6	Lockers	3.57	3.54	4.00	3.77
7	Internet access	3.14	3.69	4.00	3.72
8	Pay phones	3.00	2.51	3.86	3.49
9	Medical bay	2.86	2.58	2.81	3.13
10	Appearance	3.00	3.41	3.14	4.21
11	Cost	3.86	4.26	4.14	3.88
12	Staff knowledge of local activities and attractions	4.14	4.07	3.57	4.20
13	Friendly guests	4.43	3.84	3.50	3.86
14	Close to attractions	3.14	3.83	3.33	4.03
15	Close to transport	3.86	3.89	3.50	4.07
16	Shuttle transport on-site	3.14	3.10	3.71	3.56
17	Tour booking service	3.86	3.23	3.57	4.10
18	Advance booking facilities	4.14	3.33	3.43	3.93
19	Parking facilities	3.86	2.67	2.57	3.40
20	Laundry facilities	2.86	3.38	2.71	3.71
21	Swimming pool	3.29	2.56	3.00	3.27
22	Satellite TV	2.14	2.32	2.57	3.20
23	Availability of tourist information	3.57	3.73	2.86	4.23
24	Restaurant	2.86	3.04	3.00	3.67
25	Bar	2.86	3.79	2.71	4.03

Figure 49 below shows the importance-performance grid from the tourists rating of attributes importance and performance. The grid is clearly different from that from the suppliers' perspective in a number of ways (refer to figures 31 and 49). The most important result, however, is that most of the attributes fall under the ‘keep up the good work’ Quadrant 1for both. Also, according to the tourists there are no major weaknesses that need immediate attention, however, there are five attributes in Quadrant 2 ‘possible overkill’ on which the suppliers are possibly wasting resources on as they are not that important to the customers. These attributes include:

- Attribute 8: Pay phones
- Attribute 9: Medical bay
- Attribute 19: Parking facilities
- Attribute 21: Swimming pool
- Attribute 22: Satellite TV

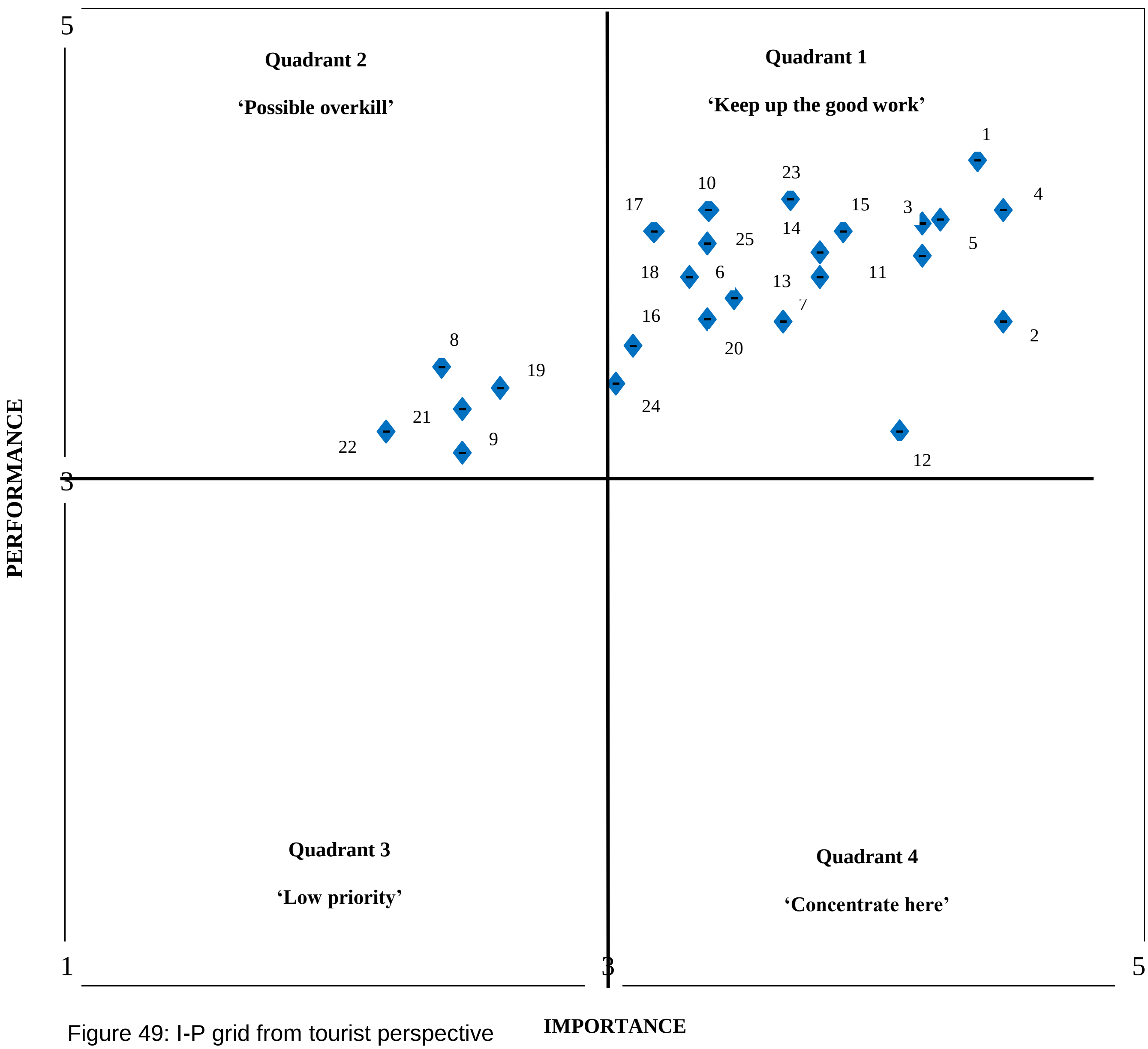


Figure 49: I-P grid from tourist perspective

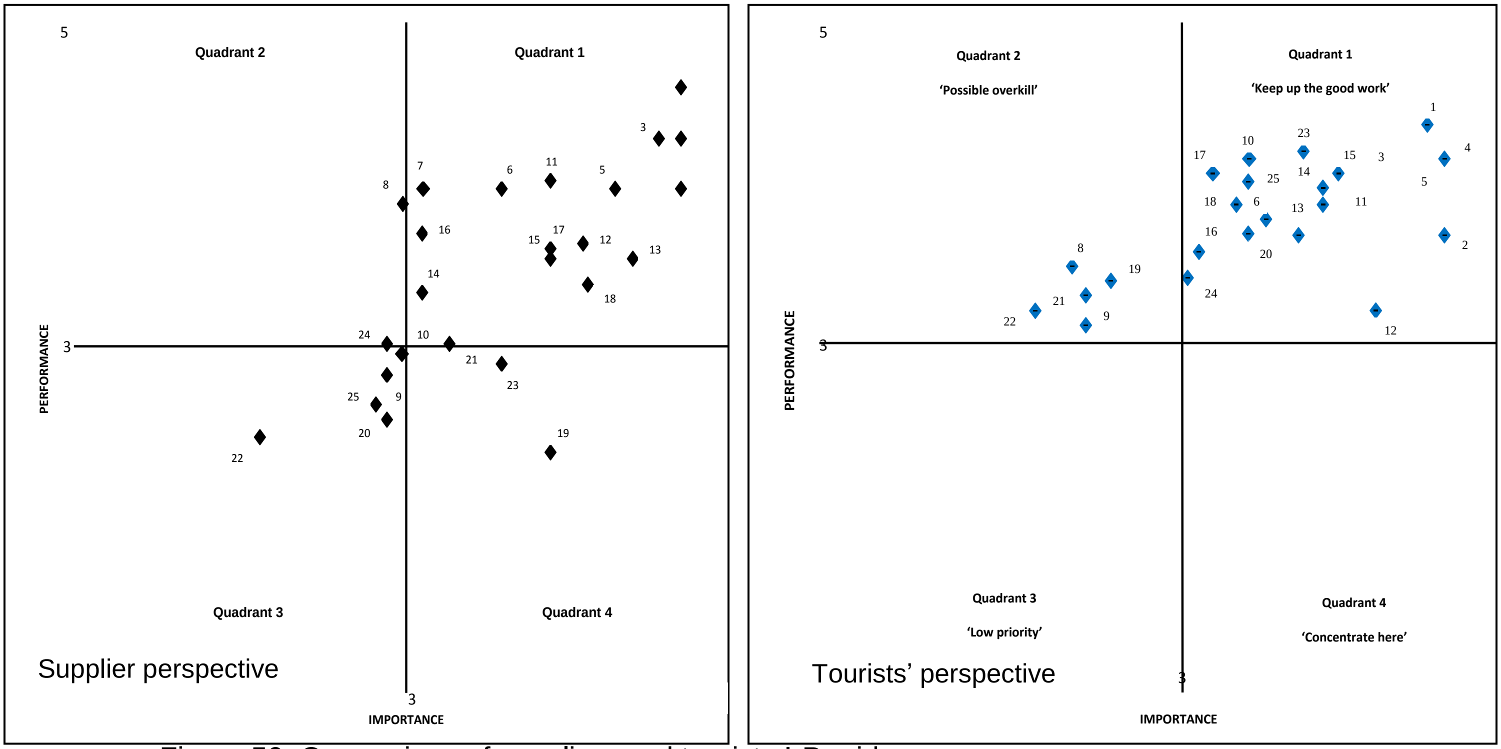


Figure 50: Comparison of suppliers and tourists I-P grids

An analysis if these two I-P grids side by side show that suppliers under-estimate their performance on some and over-estimate on others. According to the tourists there are no attributes on which they perform below average (3) and yet the suppliers grid shows several attributes under the average (3) line on performance. However the suppliers also over-estimate the importance of several attributes to customers, which are not necessarily important to the customers. These include the five attributes listed earlier.

8.2.2 Primary research findings from the 'Have-not-visited' group

This section will discuss in brief the key findings from the group of respondents who had not visited Cape Town on a backpacking trip, but had visited other destinations. Only descriptions of the key points will be given here as there were only three responses from this group, therefore not possible to run any analyses.

Most importantly destination managers would like to know and understand why people don't visit their destination in favour of others and also what the other destinations do and/or offer that attract tourists. Some destinations visited were Durban, South East Coast and various cities in Vietnam. For one of the respondents Cape Town was not even on the consideration list of possible destinations. Coincidentally that same respondent indicated that their main deterrent to visiting Cape Town was that they were simply unaware of Cape Town offerings. This is a rather sad indication of poor or lack of marketing of backpacking products. However the main reasons stated overall for not visiting Cape Town were:

- ❖ It is too far to travel to
- ❖ Cost of flight
- ❖ Not enough time to travel to Cape Town

Mentioned as the major deterrents to visiting Cape Town were:

- ❖ Crime and lack of safety and security
- ❖ Political climate
- ❖ Not value for money destination
- ❖ unaware of Cape Town offerings

The main sources of these deterrents mentioned included: media and friends and family. This is really not a very surprising finding as most of the western media dwells mainly on the negatives of the African countries and rarely on the good and positive developments. This is a disadvantage for democratic and progressive African countries such as South Africa as they are lumped together with the rest of Africa. Also, friends and family of people living abroad are not helping the destination as they also help nurture and foster negative perceptions of South Africa. It is quite a loss to the destination as these respondents indicated that they take an average of three 'longer than five nights' trips in a year, therefore would be beneficial to Cape Town if these tourists had Cape Town on their consideration set of destination

To end on an encouraging note, it is interesting to point out that the respondents indicated that they would consider visiting Cape Town in the future. It is therefore, a challenge for destination managers to manage the negative perceptions spread around by the media and friends and family to potential tourists.

9.0 Action Plan

This section presents the action plan with regards to backpacking and youth tourism in Cape Town following the findings of the study. It starts with presenting the overall goal, followed by the key action areas and the actions in that order.

Overall goal

Lack of data has made it difficult to establish the current growth trends of backpacking in Cape Town. However, it can be concluded from the minimal available trends data supplied by language schools, lodging and other primary sources, that backpacking tourism has been growing at an annual rate of between 2 to 5% within the past three to five years. This is much lower than the national and to some extent global average growth rates. The main reasons that constantly came out as hindrances for growth were lack of knowledge about the sector, bad perceptions, lack of government support and lack of marketing among others. The overall goal, therefore, should be to grow Cape Town's backpacking tourism from its current state of obscurity to become one of the global backpacking destinations of choice. This will be achieved through enhancement of perceptions about backpacking tourism in Cape Town, increased government support and regulation, increased marketing and sustainably developing and growing the niche sector. The action plan, therefore, is divided into the following sections to fully address the needed actions:

- Industry organisation and Government support
- Growth and Development
- Marketing
- Skills and human resources

The tables below present the detailed action plan with the prioritisation from the workshop added in the form of colour codes. Red illustrate the high priority areas overall and the green represents high priority actions. The uncoloured represent low priority areas.

Key Area 1: **Industry organisation and government participation** (In red are the big 5 high priority areas and in green are the high priority actions)
Goals: Create an organised sector; improve public-private sector relations and government support for backpacking tourism in the next 2-5 years and beyond

Action	Objectives	Resources	Rational	Potential Barriers & Time Line	Designated Org	Evidence of success	Evaluation
Establish a public-private sector backpacking working/ regulatory body (addressing zoning issues)	-Create and foster good public-private sector relations, coordination, cooperation and partnership. -Set rules and regulations to regulate the industry -Monitor and evaluate progress, trends & challenges -Set operating standards	-Time resources - HR to be assessed limited input needed -+/- R150 000 a year of costs related to travel, and meetings of body members.	-From the study it is clear that currently public-private sector cooperation is minimal or non-existent. This issue will have to be resolved to go forward with this niche. -It came out clear from the suppliers that there are no guiding rules, regulations and standards across the niche sector.	- Lack of commitment , cooperation and interest from one group or both -Lack of trust between groups -Lack of financial & other resources Within 6 months	CoCT Department of Tourism	-A fully functional BP working/regulatory body in place -Improved public-private sector cooperation -Increased communication and flow of information between groups.	-Success of the body -periodic review of public-private sector relations.
Hold biannual BP industry networking sessions/ workshops	-Improve public private sector relations. -Encourage BP stakeholders' networking & sharing of information.	-Time & human resources -+/- R300k/year	-Apart from Backpacker conferences there is currently no regular networking and sharing of information between different stakeholders groups in Backpacking tourism. Therefore, no overall assessment of the performance of the sector.	-Lack of commitment -Lack of resources Short term 1 yr	CoCT Department of Tourism.	-Successful BP networking sessions in the first year and beyond.	-Assessment of participation by industry stakeholders both public and private
Establish BP specific lodging grading and certification system based on a minimum standard approach	-Maintain and monitor standards among backpacking lodging service providers that are consistent, practical and suitable for their circumstances	-Time & human resources	-Currently there is no such system and backpacking accommodation are graded under the same system as the others, unfairly representing them as their circumstances are very different	-Resistance by other industry stakeholders -Lack of resources. Short to medium term 2-5 years	-CoCT	-Presence of a successful grading and certification system for BP lodging facilities. -Having several certified products under the new system.	-Constantly evaluate the number of graded facilities.

Key Area 2: Development and growth (In red are the big 5 high priority areas and in green are the high priority actions)

Goal: To sustainably grow and develop backpacking tourism products and experiences in line with current global trends that enables the positioning of Cape Town as one of the premier global backpacking destinations.

Action	Objectives	Resources	Rational	Potential Barriers & Time Line	Designated Org	Evidence of success	Evaluation
Establish a BP SMME support assistance program	-Offer support (financial or otherwise) to SMMEs - Improve participation by historically disadvantaged groups and promote inclusivity -Expose SMMEs to markets	-There are already some existing SMME programs. This will need co-ordination and can just be added as an additional stand alone component to the existing programs without much additional resources. -Otherwise these will be determined as needed.	-Future growth of BP or any other niche sector has got to be inclusive to succeed. -Currently there are few BP specific SMME service providers who lack resources to compete.	-Lack of resources 6 months to a year	CoCT Tourism Department in collaboration with the marketing bodies such as CTT, CTRU and others	-Growing numbers of SMME BP service providers in Cape Town. -SMME turnover growth from BP.	-Continual evaluation of BP trends and participation. -Continual evaluation of SMME and niche sector growth through assessment of turnovers, number of employees, and performance statistics.
Develop a CoCT BP product development & growth plan	-Have a BP development plan that identifies growth areas and gaps in supply of BP services in relation to demand. -Have in place a CoCT BP product and experiences resource inventory -Have an up to date record of resources and infrastructure.	-Time resources - Might be no additional HR costs as it can be added to current HR performance areas -+/- 50k per annum for inventory monitoring and updating	-Currently there is no plan or system to continuously monitor product and experience supply with respect to demand.	-Lack of resources -Lack of skills -Lack of cooperation by stakeholders Immediate to 1 year	-CoCT Tourism Department in collaboration with BP service providers and suppliers.	-Presence of an established system of BP product development plan complete with up to date product and experience resource inventory.	-Continuously assess and monitor BP product and experience supply. - Regularly update inventory to consider new entries and exits. -Continuously monitor progress of plan

Develop higher end BP products and activities within the CBD and other areas	-To cater for the currently changing global trend towards higher end backpacking	-Time resources -Mostly private sector investment	-Current global trend is towards older and high end backpacking facilities such as lodging , therefore important for the CoCT not to be left behind.	-Lack of resources -Resistance by stakeholders Short to long term	-Private sector, but with support of and encouragement from government	-Increase in higher end backpacking suppliers.	-Continual assessment of products supply, to ensure new products developed are inventoried.
Develop and support environmental and sustainability plans for service providers with incentives or award schemes	-Have all attractions develop and implement an environmental and sustainability policy/plan by 2011 -Ensure sustainability of the natural beauty and resources that attract the tourists in the first place.	-Time resources -But mostly private sector input +/-R 150k/year monitoring and evaluation plus awards aimed at providing performance improvement support	-Currently all the suppliers (attractions/ language schools) interviewed have no environmental protection and sustainability plan. -developing and implementing these is in line with global best practice.	-Lack of resources -Lack of cooperation from the suppliers -Lack of commitment Medium term 2 years	-Service providers, but with the CoCT coordinating, monitoring and providing supporting improved performance support Can be linked to Responsible Tourism Awards)	-Each attraction having and enforcing the plans. -Policies publicly displayed at attractions	-Continuous monitoring and evaluating of attraction to ensure policies and plans are implemented.

Effectively communicate existing safety and security programs to tourists	-Promote growth of niche sector through active reduction of crime and improvement of safety and security of both tourists & residents -establish partnerships with the responsible departments and stakeholder	-Not much more additional financial resources as programs already exist.	-Crime, safety and security have been continuously cited as the major obstacles to BP tourism growth and development in Cape Town by suppliers and also as a major problem by tourists.	-Lack of cooperation by the responsible departments Short and long term	-All stakeholders , CoCT public safety department and CoCT tourism department facilitating communication and action	-Increased visible policing -Safer surrounds -Reduced incidences of crime	-Continuous monitoring of tourists and stakeholder satisfaction and perceptions about safety and security in the destination -Keep track and record of incidences to establish trends in the long run

Key area 3: **Marketing** (In red are the big 5 high priority areas and in green are the high priority actions)

Goal: Sustainably grow backpacking tourism in Cape Town by a minimum of 5% per annum in the short to medium term (up to 5 years) and by over 5% beyond five years.

Action	Objectives	Resources	Rational & anticipated outcome	Potential Barriers & Time Line	Designated Org	Evidence of success	Evaluation
Establish BP specific JMIs with other African countries	**-**Capitalise on opportunities offered by neighbouring countries and save on financial resources. -Increase international backpacking traffic coming via other African destinations to about 50% in three years.	**-**Financial resources will depend on the size and duration of JMIs -Might not be any need for additional HR as the current can be utilised-JMI deal would be cost effective	**-**Over 20% of BP to Cape Town arrive coming from other regional destinations and about same percentage leave the country on route to other regional African countries before heading back to their home countries. -Anticipated outcome would be growth in overall BP arrivals and growth of	**-**Lack of resources -Lack of cooperation from the other countries Short and long to 5 years	**-**CoCT destination marketing body (CTT, CTRU) and private sector partnerships	**-**Growth in arrivals via other regional countries to 50% and over. -Growth in BP visitors to Cape Town by a rate of 5% per annum and above	**-D**estination BP performance research to measure the flow of BP traffic in and out the destination.

			international BP coming through other countries.				
In the short term focus on the already established Cape Town markets such as Domestic, UK, Germany, Netherlands & USA	-Increase awareness of Cape Town as a BP destination for both domestics and internationals without too much additional resource commitment -Reduce negative BP perceptions in the domestic market -Increase length of stay in Cape Town from the current average of 11 nights to 20 nights within the next five years. -Increase average spend/trip by 10% from the current R7737 within 5 years	**-**Financial resources depend on the extend and campaigns settled for ,but R5m-R10m domestic marketing and +/-R15m international marketing will generate awareness.	-These are already established markets for Cape Town and it's just the message that needs to include backpacking. There won't be much more resources commitment to what is already being committed. -The anticipated outcome would be greater awareness of Cape Town as a BP destination and in the core markets as well as improved BP perception in the domestic markets.	-Lack of commitment -Lack of resources Short to medium term	-CoCT destination marketing bodies (CTT, CTRU) and private sector	-Increased awareness of Cape Town as a BP destination +/-5% annual growth in BP traffic to Cape Town within the next five years. -Length of stay of 20 nights within 5 years -10% increase in spend/trip within five years	**-**Destination performance and awareness research -Continual tracking and monitoring of BP performance indicators such as hostel occupancy and room rates, attraction visitation, length of stay, spend and others
-Establish BP specific marketing programme for the non-conventional Cape Town markets and insert BP as separate niche in all market	**-**Increase domestic participation -Increase traffic from the non-conventional markets such as South America, Africa and Asia -Increase edu-tourism and language tourism	+/-R15m	**-**The current global growth in outbound tourism is coming from the Asian markets. –African, S. American and Asian markets are currently significant sources of edu- and language tourism for Cape	-lack of resources Short to medium term	CoCT destination marketing bodies (CTT and/or CTRU) and private sector.	-Growth in BP participation from these markets.	-Research, and performance evaluation and monitoring of key indicators.

tools -Target the Asia & S. American markets for language and educational tourism			Town from the study findings. -Anticipated outcome would be growth in inbound traffic from these markets and BP activity in the destination at edu- and language establishments				
Develop and conduct both trade oriented and consumer oriented marketing programmes Trade programmes such as Fam-trips, trade shows, tour operator and agent workshops and consumer programs such as hosting media, direct mail campaigns & consumer advertising	**-**Maximise exposure and promotion of BP and youth tourism both domestic and internationally	**-**These can be achieved without much more investment as these already occur. There only needs to be BP and youth specific angle and content added	**-**Backpacking tourism is on the rise globally and locally, but there hasn't been dedicated programmes for this niche sector in Cape Town even though many programmes currently run overall. Including BP to these already existing programs ensures growth of BP tourism. -The anticipated outcome would be growth in BP and youth tourism awareness and commitment to this niche sector	**-**Lack of commitment -Lack of resources Short to long term 5 years	CoCT destination marketing bodies	**-**Established programmes dedicated to BP running smoothly	-Assess success of programmes on a regular basis -Evaluate niche sector performance through performance research
Produce BP and youth tourism specific marketing collateral after careful review of current collateral to avoid	**-**Increase supply of BP and youth tourism collateral -Increase exposure of the destination as a BP destination	+/-R200k-R500k initially depending on how much already exists	**-**Collateral is an easier and cheaper way of gaining access to markets including those markets that would otherwise be inaccessible by technology.	-lack of resources -lack of commitment by responsible parties Short to long	CoCT marketing bodies	-Existing BP dedicated collateral -Increased BP and youth travel activity in the destination -Increasing BP	-Continuous evaluation and updating of collateral -Destination performance research to measure and

overlaps. Incorporate a BP specific visitor information system into the current one			-Dedicated marketing collateral communicates commitment to both the stakeholders and consumers alike	term 7 years		and youth tourism indicators	track niche sector performance and return on collateral investment	
Support the BP industry's bid to host a Cape Town-based BP conference in 2012	-Increase exposure and revenue making opportunity	+/- R200K for supporting conference --- -function -launch -Promotional material	Current industry driven initiative	Initiative already in motion Medium term 2 years 2012	Private sector driven with CoCT support in discussion with CTRU due to previous support supplied			

Key Area 4: Skills and human resources (In red are the big 5 high priority areas and in green are the high priority actions)

Goal: To continuously up skill the travel and tourism workforce in order to meet the growing and ever changing demands of the sector

Action	Objectives	Resources	Rational	Potential Barriers	Timeline	Responsibilities	Evidence of success	Evaluation
Participate on advisory boards of tourism departments of Cape Town's institutions of higher learning	-To influence decision making with regards to tourism curricular	-Time resources	-It is important for industry practitioners to have influence on course and curricular development for tourism programmes so that graduates are trained to meet industry needs and demands.	-Politics of academic institutions	-Short to long term (immediate to 5+ years)	-Tourism stakeholders, service providers, government and private sector alike	-Positive influence on tourism academic curricular -Properly trained graduates	-Continual assessment and participation in curricular development

Establish internship programmes	-To give hands on training to college students to prepare them for the job market	-Time resources -No financial resources if interns are not paid, otherwise minimal.	-Those graduates who are academically smart are not always practically prepared for the real world job market. Exposing them to the job market prepares them.	-Lack of cooperation from academic institutions -Lack of resources	-Short to long term (1-5+ years)	-All tourism stakeholders -CoCT Department of Tourism can promote & coordinate.	-Running coordinated internship programmes with all institutions of higher learning	-Assess impact of internship programmes on a regular basis -Assess placement rates of interns by institutions
Encourage on the job training programmes	-Enhance skills while on the job, training employees on their specific jobs and responsibilities	-Time resources -Financial resources minimal to the CoCT as mostly run by private sector	-On the job training programmes up skill employees with the specific skills they require on their current job. Therefore, improves their performance immediately	-Lack of resources -Lack of commitment by service providers	-Short-long term	-All tourism service providers, both private and public	-Improved employee performance and reduced employee turnover	-Continuous assessment of relevance of on-the-job training programmes

Conclusion

The backpacking study both the secondary and primary sections has revealed several trends, some impressive and others not so impressive. Undisputed, has been the fact that backpacking and youth tourism are on the rise and not likely to rescind any time soon. Secondary data trends have shown that backpacking is growing globally and that it is poised for even bigger growth especially so with the increasing economic hardships. It has also shown that backpacking is not necessarily a low income, ‘junkie’ tourism niche tourism sector as usually believed, but that it is growing not only in demand, but in diversity of participants. Globally backpacking suppliers have been changing and repositioning their products and offerings to capture this new trend of older and upmarket type of backpacker.

In South Africa backpacking has been growing, but there is lack of consistent data both at the national and local levels to ascertain the trends. However, primary data research has shown that there is increasing interest, participation and awareness of backpacking as a viable tourism niche sector. However, there are still mounting challenges that need to be tackled and addressed for the niche sector to take up and grow to the level of global recognition especially when there are global backpacking champion destinations such as Australia, New Zealand and Thailand. There are several challenges that presented more often than others during this study but the most common were: lack of government recognition and support, lack of marketing, lack of awareness of the sector, negative perceptions about backpacking and lack of private-public sector cooperation among others.

While these several challenges that have been cited, there are also good signs showing the potential of this niche in Cape Town, including dedication among the backpacker service providers to promote their niche sector to recognition. Also, the current trends and flow of backpacking traffic to Cape Town even with the current minimal marketing and promotion, shows that it is a high potential niche sector. In an effort to identify and map the path to recognition of the full potential of this niche sector, this study presented an action plan. The action plan identified four key areas including: industry organisation and government support, development and growth, marketing and skills and human resources. There are several actions discussed under each key area which, though not entirely prescriptive, offer important directions to start realising the full potential of this very important niche sector.

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APPENDICES:

Appendix I:

City of Cape Town Backpacking and Youth Tourism Investigative Study Workshop 30 June 2009

Table of Contents

List of Abbreviations

AI	Annely Ickua
BP	Backpacking
BSA	Backpacking South Africa
CBD	Central Business District
CoCT	City of Cape Town
CTRU	Cape Town Routes Unlimited
CTT	Cape Town Tourism
DK	Deborah Kleynhans
I-P	Importance – Performance
JMI	Joint Marketing Initiatives
KS	Kamilla Swart
PW	Paul Warmeant
SAYTC	South Africa Youth Travel Confederation
SMME	Small Medium & Micro Enterprises
TV	Theuns Vivian
UK	United Kingdom
WCEDT	Western Cape Department of Economic Development and Tourism
WYSTC	World Youth Student Travel Conference

1. Introduction

The City of Cape Town (CoCT) commissioned a Backpacking and Youth Tourism Investigative Study which entailed conducting a study into the sector, through:

- Defining backpacking concepts and terms,
- Reviewing secondary data at all levels (global, national and local) to understand backpacking travel trends at this level including demand side factors such as travel volumes, major origin markets, consumer travel patterns, demands, requirements and needs and supply side factors such as major backpacking destinations, destination competition, availability and adequacy of supply,
- Conducting primary data (supply side – accommodation, attractions, transport and tour operators and demand side – domestic and international backpackers, including those who have visited and not visited) collection at the local level,
- Analysing data to establish trends, travel patterns, frequencies and others; comparative analysis to establish differences and similarities across the different strata: importance-performance (I-P) analysis for those that have visited the destination to establish the destination's strengths and weaknesses from the tourists' view point: impact analysis and forecasting to establish the possible positive and negative impacts of further developing this niche sector as well as estimating the likely future direction of the industry among others, and
- Developing an action plan that will be the City's 'road map' towards taking full advantage of and optimising returns from this niche sector.

The Draft Action Plan

The draft action plan (hereafter, the plan) was developed after a full analysis of all the data and information received. It is specific, measurable, results oriented, and time bound. The plan will enable the City to identify where they are with regards to backpacking and youth tourism, where they want to go and how to get there. The plan includes among others:

- Specific and measurable goals and objectives, bound by time,
- The different possible backpacker types, markets and segments to pursue,
- The appropriate messaging that should be directed to these markets,
- Time and resources that should be committed to be successful,
- Areas that need improvement in the destination to effectively attract and serve this market and the responsible parties,
- Identifying possible problem areas such as negative impacts and what should be done by whom to avoid such possible future problems,
- Responsible parties for each component of the Action Plan,
- The expected results from those markets and others, and
- Recommended industry liaison group to regularly monitor, track and evaluate progress regarding performance of the sector according to the Action Plan.

The City hosted a workshop to provide feedback based on the outcomes of this study as well as to present the draft plan. Key industry stakeholders within the sector were invited to attend the workshop. Secondly, the workshop also included a review and finalisation of the draft plan based on feedback from the stakeholders. This report is based on the outcomes of this workshop as well as highlights the way forward. Each presentation is briefly outlined below, including comments raised at the end of the respective presentations. There were various recommendations and action items which arose out of the workshop and a brief summary of these are included at the end. Additional action steps which have been recommended to be included in the plan have also been included in the revised version of the plan.

2. Welcome and Presentation by the City of Cape Town

"The Role of the City of Cape Town's Tourism Department and Background to the Study"

By: Mr Theuns Vivian

Mr Theuns Vivian (TV) from the Tourism Department of the City of Cape Town (CoCT) welcomed all attendees and presented a brief overview on the role of the City's Tourism Department as well as background to the study. His presentation was focused on the following:

1. **Departmental Objectives**
   - 1.1. Niche Market Development
     - 1.1.1. Backpacker and youth tourism
     - 1.1.2. Cultural and heritage tourism
     - 1.1.3. Nature-based and adventure tourism
     - 1.1.4. Business tourism
     - 1.1.5. Wine and cuisine tourism
   - 1.2. Policy Development
     - 1.2.1. Responsible tourism policy
     - 1.2.2. Code of conduct

2. **Backpackers Objectives**
   - 2.1. Current trends and magnitude
   - 2.2. Inherent potential
   - 2.3. Your (industry's) expectations
   - 2.4. Challenges to unleash potential
   - 2.5. Action steps/ responsibilities

For full presentation, see attached

3. Ice Breaker

"Expectations of the Study and Workshop"

By: Mr Paul Warmeant and All Attendees

As a follow-up to the start of the days proceedings, Mr Paul Warmeant (PW) facilitated a group activity with all attendees to share what their expectations of the study and workshop are. Secondly, each stakeholder took a brief glance at the four Key Areas tables presented in the plan and provided their comments.

1. **Expectations of the Study and Workshop**
   - 1.1. Improve communication between the CoCT and the backpacking sector.
   - 1.2. It would be best not to re-invent the wheel instead draw from 'studies' and 'efforts' Backpacking South Africa (BSA) and South Africa Youth Travel Confederation (SAYTC) have already done.
   - 1.3. Perhaps a representative from the backpacking sector should be present on the City's board.
   - 1.4. Monitoring mechanisms should be put in place.
   - 1.5. Need to determine and implement the benefits for all involved.

2. **Comments (on the 4 key areas tables as per the plan)**
   - 2.1. Overlapping of what BSA/ SAYTC have already done.
   - 2.2. Filtering process needs to take place (hence this study).
     - 2.2.1. BSA/ SAYTC to provide input on aspects not covered.
   - 2.3. Is there a budget available to merge what has been done in the past with the current study and proceed forward collectively? (implementation).
     - 2.3.1. CoCT indicated that there is budget available for collective collaboration.

4. Presentation by Cape Town Tourism

“Membership Benefits”

By: Ms Annely Ickua

Ms Annely Ickua (AI) provided a brief overview of Cape Town Tourism (CTT) and its mandate as the Regional Tourism Association for the CoCT. She also provided an overview of their structure, operations, latest developments and membership benefits. Her presentation included the following:

1. **Tourism structure within the Western Cape**
   - 1.1. CTT’s mandate
   - 1.2. CTT’s vision and mission
   - 1.3. CTT’s objectives
   - 1.4. CTT’s executive committee
   - 1.5. CTT’s team

2. **Cape Town accolades**

3. **How to access your membership benefits**
   - 3.1. Alliance
   - 3.2. Promotion
   - 3.3. Business support
   - 3.4. Reservations and product knowledge
   - 3.5. Networking and communication
   - 3.6. Discounts

4. **Key tourism programmes**

For full presentation, see attached

5. **Comments**

- Annely mentioned that CTT would always be available to speak to the industry.
  - 5.1. Membership and benefits
    - 5.1.1. In terms of membership, questions were raised as to whether interested backpacking and youth tourism establishments are assessed before becoming members of CTT. AI mentioned that there is a set of criteria (Practical Guide for Accommodation Start-ups) in place which establishments should conform to before they can become members. There are also qualified assessors, contracted to Cape Town Routes Unlimited (CTRU) responsible for conducting the assessment procedures. A request to view the guide was put forward and AI provided the guide later that day as per request.
    - 5.1.2. It was mentioned that a request was made to CTT by BSA for collateral which they could use at travel shows such as Indaba, but the collateral has still not been provided. AI mentioned that CTT has developed a Marketing Toolkit which includes; images, DVD clips, recommended websites, etc. for members to use in such instances.

5.1.3. AI presented a proposal to SAYTC for the possible inclusion of its members situated in Long Street, to form part of the accommodation village for the Loerie Awards which will be hosted by Cape Town in September. SAYTC offered to communicate this to its members on behalf of CTT as well as propose additional establishments on the outskirts of Long Street to be included in the village. It was noted, that there has been a lack of communication, as SAYTC has since not heard from CTT regarding taking this process forward. AI noted that from an organisational point of view, CTT was awaiting feedback from the CoCT on a number of aspects. Feedback has since been received and CTT has been informed that they can continue with their mandate as the Regional Tourism Association for the City of Cape Town until 2010. Now that they have the go ahead, AI also mentioned that they are able to allocate their available resources accordingly and in fact decide which new projects they would like to develop or which current projects they would like to continue with. Since the workshop, Gavin Eyre, from SAYTC has managed to secure a meeting with CTT for the week of July 6th.

5.1.4. With regards to the fire at Two Oceans Lodge in Loop Street earlier this year, the media used the incorrect name and reported it as the Two Oceans Backpackers Lodge burning down. This created confusion amongst the public as the Two Oceans Backpackers is a different establishment which is located in Long Street and is still standing. SAYTC approached CTT to assist by issuing a press release in this regard to clear up the confusion. All the relevant information was provided to CTT and up until now, the press release or any other support has still not been provided by CTT. AI mentioned that she will follow-up in this regard and revert.

Overview of Key Findings

By: Dr Kamilla Swart

Dr Kamilla Swart (KS) presented an overview of the key findings of the study. Her presentation covered the following:

1. **Introduction and Methodological Approach**
   - 1.1. Introduction to study
   - 1.2. Research methodology
   - 1.3. Research methodology partnership with BSA and SAYTC
   - 1.4. Data Collection
     - 1.4.1. Challenges
     - 1.4.2. Interventions for challenges

2. **Secondary Data – Key Findings** (due to time constraints this was not presented but is available in the presentation)
   - 2.1. Definitions and concepts
   - 2.2. Backpackers to South Africa
   - 2.3. Major source countries for international backpackers visiting South Africa
   - 2.4. Key features of South Africa visit
   - 2.5. Travel patterns within South Africa
   - 2.6. Geographical distribution of suppliers of backpacker accommodation, by province
   - 2.7. General backpacker needs and requirements
   - 2.8. General backpacker travel motivations
   - 2.9. Global transport and accommodation trends
   - 2.10. Global backpacker accommodation use
   - 2.11. Average spend
   - 2.12. Average spend per backpacker over whole visit to South Africa
   - 2.13. Activities
   - 2.14. Length of stay
   - 2.15. Backpacking destinations
   - 2.16. Backpacker destinations in South Africa
   - 2.17. South African backpacker accommodation survey
   - 2.18. Infrastructure
   - 2.19. Youth travel demand
   - 2.20. Volunteer tourism
   - 2.21. Impacts of backpacker tourism
   - 2.22. Shortcoming for local development
   - 2.23. Demand side challenges

3. **Primary Data – Key Findings**
   - 3.1. Suppliers: lodging
     - 3.1.1. Advertising
     - 3.1.2. Seasonal occupancy rates
     - 3.1.3. Visitor characteristics
     - 3.1.4. Top five source markets with highest yields – 2008

3.1.5. Importance – Performance (IP) of lodging facilities
3.1.6. Challenges for growth and development in Cape Town
3.1.7. What to do going forward

3.2 Suppliers: tour operators
3.2.1 Languages in which services are offered
3.2.2 Challenges

3.3 Suppliers: attractions
3.3.1 Language schools
3.3.2 Activities offered
3.3.3 Main sources of business
3.3.4 Challenges

3.4 Demand side: demographics
3.4.1 Gender and age
3.4.2 Ethnicity and origin
3.4.3 Education
3.4.4 Monthly income

3.5 Demand side: travel patterns and characteristics
3.5.1 Underlying motive to travel
3.5.2 Main purpose of visit
3.5.3 How the tourists heard about Cape Town

3.6 Demand side: trip planning
3.6.1 Time between destination selection and travel

3.7 Demand side: within destination travel pattern
3.7.1 Repeat visitation and travel group size
3.7.2 Mode of transport
3.7.3 Accommodation choices
3.7.4 Reasons for selecting accommodation type
3.7.5 Accommodation suburb
3.7.6 Length of stay
3.7.7 Spend by origin and category (in Rands)
3.7.8 Attractions visited
3.7.9 Activities participated in

3.8 Demand side: competition
3.8.1 Other destinations considered before settling for Cape Town

3.9 Demand side: perception and satisfaction rating

3.10 Demand side: I-P
3.10.1 Tourists' viewpoint

3.11 I-P grid for backpacking accommodation attributes – tourists' perspective

3.12 Comparison of supplier's and tourists' view of I-P of backpacking accommodation attributes

4. Comments

4.1. The question was raised regarding what is being put in place to motivate locals to use backpacking establishments. It was also questioned as to whether or not the domestic market understands what backpacking is. They could be of the understanding that it is cheap travel; and the ideal way to deal with this misconception would be to first educate the locals about the sector. KS mentioned that they did not receive as much domestic responses as intended, however, as one of the outcomes of the study, this seems to be a target market that needs to be developed and should be targeted in a separate study.

4.2. Data collection for the study was mainly done online, for both the supply and demand sides. In relation to the demand side, emails were sent to a guest database. However, various interventions were used, one of which was leaving surveys at backpacking establishments for guests to complete. It was mentioned that as this study was being conducted during winter, the profile of visitors would be different to those visiting during summer. KS pointed out that this did not really have an impact on the study as most responses were received online from the database which includes past guests who have visited Cape Town during both winter and summer. KS also noted that there was a concern from the backpacking sector regarding possible language barriers which could affect the accurate completion of surveys by guests; however, no problems have arisen from those surveys received.

4.3. KS also mentioned that although BSA and SAYTC were on-board the study, they still experienced some challenges within industry and getting people to respond, especially from service providers and the ‘have not visited’ survey, even though additional time for responses was allocated.

Full presentation will be available on the website

5. Presentation by the City of Cape Town

"City of Cape Town's Short, Medium and Longer-Term Achievable Actions"

By: Mr Theuns Vivian

Mr Theuns Vivian presented the short, medium and longer-term achievable objectives for the CoCT with regards to the backpacking and youth tourism sector as per the draft plan. His presentation covered the following:

1. Short-term Achievable

1.1. Public-private backpacking working body (zoning)

1.1.1. With whom does the CoCT work in this regard? BSA to advise the City who the relevant persons/ body will be. This will ensure a clear line of communication between the CoCT and the backpacking sector through BSA and SAYTC's membership base.

1.2 Industry networking sessions

1.2.1 CTT hosts regular networking sessions which the CoCT feeds into.

1.3 Communicate existing safety and security programmes (through CTT).

1.3.1 CTT and the Western Cape Department of Economic Development and Tourism (WCEDT) initiated the Victims Support Programme which has since been re-named the Band-Aid Programme. The Band-Aid programme looks after visitors who have been victims of crime in the city and has received more positive feedback since the name change. This programme should be communicated effectively to the industry so that awareness can also be created amongst visitors, to become more 'responsible' tourists by taking extra precautions for their safety. What is the backpacking sector doing to improve safety and security for visitors? BSA and SAYTC should inform the City and this can be done through a liaison group.

1.3.2 It was noted that South Africans often give foreigners the wrong impression. When foreigners enquire about safety and security in South Africa, they are more often referring to the cleanliness, safety of water, illnesses, etc. Yet when answering, South Africans immediately refer to crime. This could be addressed by warning South Africans to be more responsible in this regard.

1.4 Strengthen existing Cape Town source markets including domestic and the UK.

1.4.1 CoCT's marketing spend is mainly with CTT. Joint marketing platforms could be used and BSA/ SAYTC to advise as to what outcomes they would like to achieve.

1.5 Backpacking-specific marketing programme

1.5.1 Marketing what backpacking tourism entails to the domestic market.

1.6 Specific marketing programmes at trade and consumer shows.

1.6.1 Backpacking sector to get on-board with CTRU and CTT

1.7 Backpacking/ youth tourism specific collateral

1.8 Support for WYSTC 2012 to prospectively be held in Cape Town and networking session at WYSTC 2009

1.8.1 TV has indicated the City's support for the conference in 2012. There was also a request for funding to host a networking reception at WYSTC 2009 which will be held in Manchester, England in September. TV requested that a proposal be submitted to the City in this regard highlighting the benefits to the City for supporting these initiatives.

1.9 Participate on advisory boards

1.10 Establish internship programmes (together with industry)

1.10.1 Specify what internships entail and clarify outcomes. Also implement measures to prevent business ‘poaching’ from interns.

1.11 Encourage on the job training (together with industry)

1.11.1 Specify what on the job training entails

2. Medium-term Achievable

2.1. CoCT backpacking product development growth plan

2.1.1. Consider what monitoring measure for the sector needs to be developed and implemented.

2.2 Develop higher-end backpacking products and activities in the CBD

2.2.1 There are numerous ways in which this can be achieved. One such example is to beautify the city centre. Currently, there are numerous private sector businesses partnering to keep the city clean over weekends when the City Council is not operating. Assisting with small gains will contribute to bigger achievements in the long run.

2.3 Backpacking specific Joint Marketing Initiatives (JMIs) with other African countries

2.3.1 Need to specify if this is with the backpacking industry within other countries or with the government. It was noted that it is specifically more with the industry than government. There are already many visitors coming from Lesotho and Swaziland. TV also mentioned that should ‘sister cities’ be developed, the benefits should be highlighted and that industry partnerships seem to be more fruitful.

3. Longer-term Achievable

3.1. Backpacking specific grading certification system

3.1.1. Have minimum standards for backpacking establishments and these standards also need to fit into the existing grading system.

3.2 Backpacking-specific SMME support programme

3.2.1 Marketing platforms are provided by CTRU, e.g. Indaba, for which the CoCT makes a contribution. Perhaps as a starting point, get the smaller businesses to partner with the big guns of the industry. There is money available; however, a good business plan is required.

3.3 Environmental and sustainability plans for service providers with incentives

6. Action Plan Review

Group Discussions

After being split into four groups, the stakeholders had to provide feedback and comments (Activity 1) on the four key areas (split into 17 actions) identified in the draft plan. Thereafter, for Activity 2, each stakeholder had to rate each action according to high, medium and low importance. Then each group had to prioritise five big actions (Activity 3). The following four key areas were identified in the plan:

1. Industry organisation and government support
2. Development and growth
3. Marketing
4. Skills and human resources

1. Activity 1 – Feedback on Key Priority Areas

1.1. Group 1

- 1.1.1. Educate CoCT staff/ municipalities (town planners, zoning, etc.) on what backpacking is.
- 1.1.2. Minimum requirements should be set before establishments can be classified as backpackers.
- 1.1.3. Representatives from CoCT/ CTT to sit on SAYTC board and attend meetings, to see what they are about. Similarly, representatives from BSA/SAYTC to sit on CoCT/ CTT's board.
- 1.1.4. Educating locals and general public on what backpacking is. For e.g. neighbours could object to the opening of a backpacker's establishment in the neighbourhood due to their misconception of what backpacking is.

1.2 Group 2

- 1.2.1 Staff within the backpacking sector should understand what backpacking is.
- 1.2.2 Similarly, staff development in the backpacking sector should take place and could reduce the high turnover of staff in the sector.
- 1.2.3 Due to staff constantly changing, perhaps owners of backpacking establishments should develop a forum which could assist in dealing with these matters by allowing the change of ideas or the formulation of plans on how to deal with changing staff.

1.3 Group 3

- 1.3.1 An additional marketing opportunity to specifically market youth tourism was identified as hosting a fringe backpacking and youth tourism event to Indaba (not at the same venue). The question as to why not host it at Indaba was raised and it was mentioned that Indaba is too expensive and some members cannot afford it. Sponsorships would be sought for various aspects of the event such as meals, entertainment, etc. TV mentioned that perhaps a specific area within the Cape Town or Western Cape stands should be allocated to accommodate this market. The issue of funding was raised again and TV requested that the sector provides the City with a funding proposal including the above-mentioned as well as additional funding requirements, and it was important to state the benefits of the respective interventions.

1.3.2 It was mentioned that when BSA enquired about exhibition space at Indaba, South Africa Tourism (SAT) informed them that there was no more place available. TV agreed to follow this up with SAT as this is hard to believe. BSA to forward the details of proceedings to TV accordingly. (Short-term sub-action)

1.3.3 Market South Africa domestically. Marketing has already been done at the University of Stellenbosch. Other marketing efforts include the Coast 2 Coast books and Alternative Route. There also seems to be a lack of awareness amongst South Africans abroad as to what backpacking is.

1.3.4 Marketing and producing brochures is expensive. An example of a collaborative effort has been done by a number of backpacking establishments in the Garden Route. Perhaps the members in Cape Town could do a similar effort.

1.3.5 The backpacking sector is most probably the only sector that is more involved with responsible tourism and perhaps they should get some more recognition for it. It would be important to create awareness for the initiatives.

1.3.6 The spend in this sector, is also much more localised than higher tourists (more focused on SMMEs). Awareness should be created in this regard.

1.3.7 Support World Youth Student Travel Conference (WYSTC). TV indicated that the City will support this initiative, provided it included a strong motivation and was submitted timeously.

1.4 Group 4

1.4.1 Industry to create awareness of internship opportunities (skills and development).

1.4.2 TV mentioned that there are two accommodation options which ‘backpackers/ youth’ will consider when travelling. Namely; for a short stay they would choose backpacker accommodation only versus a longer stay where they would choose alternative accommodation options.

2. Additional Comments

2.1. TV mentioned that he did not hear much about youth tourism and he does not want it to fall off the wagon.

2.2. Perhaps the sector should capitalise on the four universities in Cape Town as possible marketing opportunities.

2.3. As far as staff training is concerned, it was also mentioned that the courses offered as part of the Tourism Enterprise Programme (TEP) are not very relevant to some of the current staff working in the sector and perhaps one of the four universities can provide alternative options.

2.4. TV enquired up to what age can a traveller be classified as youth and it was noted till approximately 35 years, therefore cognisance of the fact that backpacking and youth travel is not only for youngsters needs to be taken into account.

3. Activity 2 – Action Ratings According to High, Medium and Low Importance

As per Activity 2, each stakeholder had to rate the actions identified in the draft plan, according to low, medium and high importance. Figure 1 accompanied by Table 1 below, highlights the outcomes of this activity as per the action items numbered 1 – 18. Table 1 can be used as a reference explaining what each activity entails. An additional action item (number 4) to be included in the plan under key area 1 was raised and has been added. However, note that this action was not included in the ratings for this activity but has been prioritised as one of the Big 5 actions in Activity 3. For the sake of consistency in numbering, it has been included in the graph so that the actions remain numbered the same from here on. The original plan including additions has been included as an addendum.

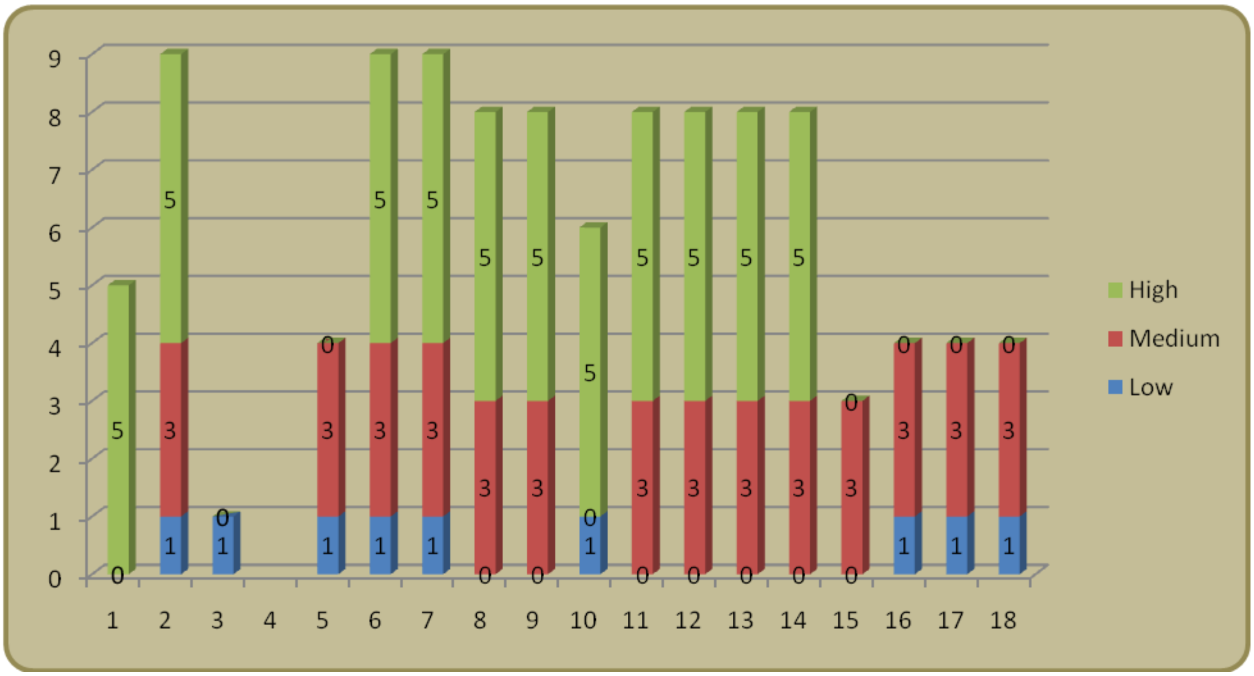

Figure 1: Action ratings according to high, medium and low importance

Table 1: Action ratings according to high, medium and low importance

No.	Action	High	Medium	Low
1	Establish a public-private sector backpacking working/ regulatory body (address zoning issues)	5	0	0
2	Hold biannual backpacking (BP) industry networking sessions/ workshops	5	3	1
3	Establish a BP-specific lodging grading and certification system based on a minimum standard approach	0	0	1
4	Awareness about processes, plans, etc. related to the backpacking sector, amongst the public sector and the various spheres of government such as municipalities, planning departments, etc.			
5	Establish a BP SMME support assistance programme	0	3	1
6	Develop a CoCT BP product development & growth plan	5	3	1
7	Develop higher end BP products and activities within CBD and other areas	5	3	1
8	Develop and support environmental and sustainability plans for service providers with incentives and award schemes	5	3	0
9	Effectively communicate existing safety and security programmes to tourists, BP industry and alert responsible departments	5	3	0
10	Establish BP specific JMI with other African countries	5	0	1
11	In short-term, focus on already established markets e.g. domestic, UK, Germany, Netherlands and USA	5	3	0
12	Establish BP specific marketing programme for non-conventional CT markets and insert BP as a separate niche in all marketing tools. Target Asian & S. American markets for language and educational tourism	5	3	0
13	Develop and conduct trade and consumer oriented marketing programmes e.g., trade shows, tour operator and agent workshops, consumer programmes, media hosting etc.	5	3	0
14	Produce BP and youth tourism specific marketing collateral (review first to avoid overlap). Incorporate a BP specific visitor information system into existing one	5	3	0
15	Support BP industry's bid to host international conference in Cape Town in 2012	0	3	0
16	Participate on advisory boards of tourism departments of higher learning institutions in Cape Town	0	3	1
17	Establish internship programmes	0	3	1
18	Encourage on-the-job training	0	3	1

4. Activity 3 – Prioritisation of the Big 5 Actions

4.1 Outcomes

As per activity 3, each group had to prioritise 5 action items which they consider as the Big 5. Table 2 below details the outcome of this activity as per the number of votes received (highest to lowest), per item.

Table 3: Prioritisation of the Big 5 Actions

Big 5 Actions Rating	No.	Action	Key Area	Designated Organisation	Evaluation
5 votes	1	Establish a public-private sector backpacking working/ regulatory body (address zoning issues)	1 (Industry organisation & government participation)	CoCT Tourism Department	• Success of the body • Periodic review of public-private sector relations
3 votes	3	Establish a BP specific lodging grading and certification system based on a minimum standard approach	1 (Industry organisation & government participation)	CoCT	• Constantly evaluate number of graded facilities
3 votes	12	Establish BP specific marketing programme for non-conventional CT markets and insert BP as a separate niche in all marketing tools Target Asian & S. American markets for language and educational tourism	3 (Marketing)	CoCT destination marketing body and private sector	• Research and performance evaluation and monitoring of key indicators
2 votes	14	Produce BP and youth tourism specific marketing collateral (review first to avoid overlap) Incorporate a BP specific visitor information system into existing one	3 (Marketing)	CoCT destination marketing body and private sector	• Destination performance awareness research • Continual tracking and monitoring of BP performance indicators
2 votes	15	Support BP industry's bid to host international conference in Cape Town in 2012	3 (Marketing)	Private sector driven with CoCT support, in discussion with CTRU due to support supplied	• Successful bid
1 vote	4	Create awareness about processes, plans, etc. related to the backpacking sector, amongst the public sector and the various spheres of government such as municipalities, planning departments, etc.	1 (Industry organisation & government participation)		

Big 5 Actions Rating	No.	Action	Key Area	Designated Organisation	Evaluation
1 vote	6	Develop a CoCT BP product development & growth plan	2 (Development & growth)	CoCT Tourism Department in collaboration with BP service providers	• Continuously assess and monitor BP product and experiences • Regularly update inventory • Continuously monitor progress of plan
1 vote	13	Develop and conduct trade and consumer oriented marketing programmes eg, trade shows, tour operator and agent workshops, consumer programmes, media hosting etc.	3 (Marketing)	CoCT destination marketing body	• Assess success of programmes on a regular basis • Evaluate niche sector performance through performance research
1 vote	9	Effectively communicate existing safety and security programmes to tourists, BP industry and alert responsible departments	2 (Development & growth)	All stakeholders, CoCT, public safety dept. CoCT tourism dept. facilitating communication and action	• Continuous monitoring of tourists and stakeholder satisfaction and perceptions • Keep track and record incidences to establish trends
1 vote	18	Encourage on-the-job training	4 (Skills & human resources)	All tourism stakeholders (public and private)	• Continuous assessment of relevance of on-the-job training

4.2. Additional comments raised

4.2.1. Action 1:

4.2.1.1. Educate the CoCT, municipalities, CTT as well as the general public about the industry. Create awareness through workshops, educationals, etc.

4.2.1.2 Ensure that communication takes place between government departments and the industry. SAYTC representation can assist in this regard.

4.2.2. Action 3:

4.2.2.1. Make the minimum standards and municipal regulations available in easy formats for zoning and land-use departments.

7. Key Outcomes and the Way Forward

The following section provides a summary of the key outcomes of the workshop as well as the way forward.

7.1. There is a need for the establishment of an industry liaison group to exist between the City and the backpacking sector. This will ensure that constant communication takes place between the two regarding all aspects as well as monitoring of the sector. Mr Gavin Eyre, Ms Deborah Kleynhans (DK) and Hannes Potgieter have been identified as the representatives with whom the City can communicate, and vice versa. TV has requested that they forward the sector's list of needs and wants from the City and in turn, TV will present this to the Portfolio Committee for approval.

7.2. The City indicated that there is budget available to assist the sector with collaborative efforts. TV requested that the sector provide a 'needs' list way in advance though so that there is enough lee way to allocate finances/ resources accordingly.

7.3. With regards to support for WYSTC 2012 in Cape Town, TV has requested a motivational proposal which highlights how the City's support will be needed as well as the benefits of this support to the City. As there is about 3 years lee way until the conference, now would be the best time to motivate this support. With regards to funding for the hosting of a networking function at WYSTC 2009, DK has already submitted a proposal to TV since the workshop.

7.4. Gavin Eyre has secured a meeting with CTT during the week of 6th July to discuss the way forward with regards to the Loerie Awards.

7.5. TV has also requested DK to provide him with the details of events regarding exhibition space at Indaba, after SAT claimed that there was no more space available.

7.6. TV ensured the stakeholders that they have the commitment of the City, however, their expectations need to be realistic as well.

8.0 Closure

By: Mr Paul Warmeant

PW thanked all stakeholders for their attendance, input as well as assistance with this study.

Addendum A – Revised Action Plan

No.	Action	Designated Organisation	Evaluation
Key Area 1: Industry Organisation and Government Support			
1	Establish a public-private sector backpacking working/ regulatory body (address zoning issues)	CoCT Tourism Department	• Success of the body • Periodic review of public-private sector relations
2	Hold biannual BP industry networking sessions/ workshops	CoCT Tourism Department	• Assessment of participation by industry stakeholders (public and private)
3	Establish a BP specific lodging grading and certification system based on a minimum standard approach	CoCT	• Constantly evaluate number of graded facilities
4	Create awareness about processes, plans, etc. related to the backpacking sector, amongst the public sector and the various spheres of government such as municipalities, planning departments, etc.		
Key Area 2: Development and Growth			
5	Establish a BP SMME support assistance programme	CoCT Tourism Department in collaboration with marketing bodies	• Continual evaluation of BP trends and participation • Continual evaluation of SMME and niche sector growth
6	Develop a CoCT BP product development & growth plan	CoCT Tourism Department in collaboration with BP service providers	• Continuously assess and monitor BP product and experiences • Regularly update inventory • Continuously monitor progress of plan
7	Develop higher end BP products and activities within CBD and other areas	Private sector with support and encouragement from government	• Continuous assessment of product supply to ensure new products are developed and inventoried
8	Develop and support environmental and sustainability plans for service providers with incentives and award schemes	Service providers with CoCT coordinating, monitoring and providing support	• Continuous monitoring of attraction to ensure policies and plans are implements
9	Effectively communicate existing safety and security programmes to tourists, BP industry and alert responsible departments	All stakeholders, CoCT, public safety dept. CoCT tourism dept. facilitating communication and action	• Continuous monitoring of tourists and stakeholder satisfaction and perceptions • Keep track and record incidences to establish trends
Key Area 3: Marketing			
10	Establish BP specific JMI with other African countries	CoCT destination marketing body and private sector partnerships	• Destination performance research to measure flow of BP traffic in and out of destination
11	In short-term, focus on already established markets eg. domestic, UK, Germany, Netherlands and USA	CoCT destination marketing body and private sector	• Destination performance awareness research • Continual tracking and monitoring of BP performance indicators

No.	Action	Designated Organisation	Evaluation
12	Establish BP specific marketing programme for non-conventional CT markets and insert BP as a separate niche in all marketing tools Target Asian & S. American markets for language and educational tourism	CoCT destination marketing body and private sector	• Research and performance evaluation and monitoring of key indicators
13	Develop and conduct trade and consumer oriented marketing programmes eg, trade shows, tour operator and agent workshops, consumer programmes, media hosting etc.	CoCT destination marketing body	• Assess success of programmes on a regular basis • Evaluate niche sector performance through performance research
14	Produce BP and youth tourism specific marketing collateral (review first to avoid overlap) Incorporate a BP specific visitor information system into existing one	CoCT destination marketing body and private sector	• Destination performance awareness research • Continual tracking and monitoring of BP performance indicators
15	Support BP industry's bid to host international conference in Cape Town in 2012	Private sector driven with CoCT support, in discussion with CTRU due to support supplied	• Successful bid
Key Area 4: Skills and Human Resources			
16	Participate on advisory boards of tourism departments of higher learning institutions in Cape Town	All tourism stakeholders (public and private)	• Continual assessment and participation in curricular development
17	Establish internship programmes	All tourism stakeholders, CoCT can promote and coordinate	• Assess impact of internship programme on a regular basis • Assess placement rates of interns by institutions
18	Encourage on-the-job training	All tourism stakeholders (public and private)	• Continuous assessment of relevance of on-the-job training

Note:

- Red shaded rows indicate Big 5 priority areas (including High priority actions)
- Green shaded rows indicate High Priority actions

Addendum B – List of Attendees

	Name	Surname	Company	Contact No.	Email Address
1	Annely	Ickua	Cape Town Tourism	021 487 6800	annely@capetown.travel
2	Carla	Ferreira	Saltycrax Backpackers	083 669 6959	info@saltycrax.co.za
3	Cecilia	De Freitas	Baz Bus	021 439 2323	cecilia@bazbus.com
4	Chris	Mears	Acacia Adventure Holidays	021 556 1157	chris@acacia-africa.com
5	Chris	Redelinghuys	Lemon Tree Backpackers	021 557 4703/ 082 771 7734	info@lemontreebackers.co.za
6	Deborah	Kleynhans	Backpacking SA	082 220 6443	deborah@backpackingsouthafrica.co.za
7	Gavin	Eyre	International House Cape Town	021 433 0546	gavin@ihcapetown.com
8	Glen	Stead	Orange Africa Adventures	076 022 8923	glen@orangeafrica.co.za
9	Hannes	Potgieter	Cape Town Deco Lodge	021 447 4216	hannes@capetowndeco.com
10	Kamilla	Swart	KSA	082 928 2881	kamilla@kamilla-sa.co.za
11	Karin	Botes	Ideal Marketing & Promotions	021 424 0393	
12	Lisa	Mason	Ashanti Lodge & Travel	021 423 8721	lisa@ashanti.co.za
13	Loyiso	Mfuku	Abang Africa Travel	021 426 1334	loyiso@abangafrica.com
14	Luanne	McCallum	Interlink School of Languages	021 439 9834	info@interlink.co.za
15	Marlene	Harris	Backpacking SA		marlene@backpackingsouthafrica.co.za
16	Mecia	Petersen	CoCT	021 483 9156	mecia.petersen@capetown.gov.za
17	Mushfieqah	Salie	KSA	082 559 0664	mushfieqahs@gmail.com

18	Neil		Stumble Inn Backpackers	021 887 4049	stumble@iafrica.com
19	Nicole	Van Heerden	Orange Africa Adventures	084 876 6764	nicole@orangeafrica.co.za
20	Noelline	Van Loggenberg	Penthouse on Long	021 424 8356	contactus@penthouseonlong.com
21	Paul		Nomad Adventure Tours	021 426 5445	paul@nomad.co.za
22	Paul	Warmeant	KSA	079 138 8284	pwarmeant@lando.co.za
23	Sabine	Behrmann	Africa Travel Company	021 385 1530	marketing@africatravelco.com
24	Sharonique	Beukes	Baz Bus	021 439 2323	sharonique@bazbus.com
25	Stephen	Visser	Bikes ‘n Wines		visserstephen@web.de
26	Theuns	Vivian	CoCT	021 483 9270	theuns.vivian@capetown.gov.za
27	Virginia	Barnard	Nomad Adventure Tours	021 426 5445	gini@nomadtours.co.za
28	Wilma	Koeppen	Ideal Marketing & Promotions	072 489 5831	idealwr@iafrica.com

Appendix II: Frequency tables for perception ratings prior to visiting 1: Poor and 5: Excellent

A. Perception on Service Delivery

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	1.6	1.6
2	2	2.3	3.3	4.9
3	23	26.1	37.7	42.6
4	30	34.1	49.2	91.8
5	5	5.7	8.2	100.0
N/A & missing	27	30.7		
Total	88	100.0		

B. Perception on Accessibility

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	2	2.3	3.2	3.2
2	3	3.4	4.8	7.9
3	22	25.0	34.9	42.9
4	29	33.0	46.0	88.9
5	7	8.0	11.1	100.0
N/A & missing	25	28.4		
Total	88	100.0		

C. Perception on quality of accommodation

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 2	4	4.5	6.3	6.3
3	28	31.8	43.8	50.0
4	23	26.1	35.9	85.9
5	9	10.2	14.1	100.0
N/A & Missing	24	27.3		
Total	88	100.0		

D. Perception on overall cleanliness

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
	1	1	1.1	1.6	1.6
	2	5	5.7	7.9	9.5
	3	30	34.1	47.6	57.1
	4	20	22.7	31.7	88.9
	5	7	8.0	11.1	100.0
N/A &	Missing	25	28.4		
Total		88	100.0		

E. Perception on friendliness of people

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
	2	2	2.3	3.1	3.1
	3	14	15.9	21.9	25.0
	4	33	37.5	51.6	76.6
	5	15	17.0	23.4	100.0
Missing &	N/A	24	27.3		
Total		88	100.0		

F. Perception on public transport

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	3	3.4	4.9	4.9
	2	19	21.6	31.1	36.1
	3	19	21.6	31.1	67.2
	4	16	18.2	26.2	93.4
	5	4	4.5	6.6	100.0
Missing	& N/A	27	30.7		
Total		88	100.0		

G. Perception on quality of infrastructure

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
	1	1	1.1	1.6	1.6
	2	13	14.8	21.0	22.6
	3	22	25.0	35.5	58.1
	4	21	23.9	33.9	91.9
	5	5	5.7	8.1	100.0
Missing	& N/A	26	29.5		

G. Perception on quality of infrastructure

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	1.6	1.6
2	13	14.8	21.0	22.6
3	22	25.0	35.5	58.1
4	21	23.9	33.9	91.9
5	5	5.7	8.1	100.0
Missing & N/A	26	29.5		
Total	88	100.0		

E. Perception on personals safety

Rating	*Frequency*	*Percent*	*Valid Percent*	*Cumulative Percent*
1	*13*	*14.8*	*20.6*	*20.6*
2	*16*	*18.2*	*25.4*	*46.0*
3	*18*	*20.5*	*28.6*	*74.6*
4	*12*	*13.6*	*19.0*	*93.7*
5	*4*	*4.5*	*6.3*	*100.0*
Missing & N/A	*25*	*28.4*		
Total	*88*	*100.0*		

F. Perception on availability of information

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
2	2	2.3	3.2	3.2
3	24	27.3	38.1	41.3
4	28	31.8	44.4	85.7
5	9	10.2	14.3	100.0
Missing or N/A	25	28.4		
Total	88	100.0		

H. Perception on diversity of attractions

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
2	4	4.5	6.3	6.3
3	11	12.5	17.2	23.4
4	24	27.3	37.5	60.9
5	25	28.4	39.1	100.0
Missing or N/A	24	27.3		
Total	88	100.0		

I. Perception on value for money

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	2	2.3	3.2	3.2
2	6	6.8	9.5	12.7
3	15	17.0	23.8	36.5
4	23	26.1	36.5	73.0
5	17	19.3	27.0	100.0
Missing or N/A	25	28.4		
Total	88	100.0		

J. Perception on availability of activities

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
2	2	2.3	3.2	3.2
3	17	19.3	27.0	30.2
4	23	26.1	36.5	66.7
5	21	23.9	33.3	100.0
Missing or N/A	25	28.4		
Total	88	100.0		

K. Perception on shopping possibilities

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	1.6	1.6
2	7	8.0	11.3	12.9
3	15	17.0	24.2	37.1
4	24	27.3	38.7	75.8
5	15	17.0	24.2	100.0
Missing or N/A	26	29.5		
Total	88	100.0		

L. Perception on quality of restaurants

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
2	5	5.7	7.9	7.9
3	21	23.9	33.3	41.3
4	21	23.9	33.3	74.6
5	16	18.2	25.4	100.0
Missing or N/A	25	28.4		
Total	88	100.0		

M. Perception on customs and immigration

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	3	3.4	5.1	5.1
2	5	5.7	8.5	13.6
3	31	35.2	52.5	66.1
4	15	17.0	25.4	91.5
5	5	5.7	8.5	100.0
Missing or N/A	29	33.0		
Total	88	100.0		

Appendix III: Frequency tables for satisfaction rating, 1: Extremely dissatisfied and 5: Very satisfied

A. Satisfaction with service delivery

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
3	13	14.8	23.6	23.6
4	27	30.7	49.1	72.7
5	15	17.0	27.3	100.0
Missing or N/A	33	37.5		
Total	88	100.0		

B. **Satisfaction with accessibility**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	1.5	1.5
3	10	11.4	15.2	16.7
4	36	40.9	54.5	71.2
5	19	21.6	28.8	100.0
Missing or N/A	22	25.0		
Total	88	100.0		

C. **Satisfaction with Quality of accommodation**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
3	6	6.8	9.1	9.1
4	39	44.3	59.1	68.2
5	21	23.9	31.8	100.0
Missing System	22	25.0		
Total	88	100.0		

D. **Satisfaction with overall cleanliness**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
3	10	11.4	14.9	14.9
4	32	36.4	47.8	62.7
5	25	28.4	37.3	100.0
Missing or N/A	21	23.9		
Total	88	100.0		

E. **Satisfaction with friendliness of people**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
3	7	8.0	10.4	10.4
4	26	29.5	38.8	49.3
5	34	38.6	50.7	100.0
Missing or N/A	21	23.9		
Total	88	100.0		

F. **Satisfaction with public transport**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	6	6.8	10.3	10.3
2	13	14.8	22.4	32.8
3	14	15.9	24.1	56.9
4	15	17.0	25.9	82.8
5	10	11.4	17.2	100.0
Missing or N/A	30	34.1		
Total	88	100.0		

G. **Satisfaction with Quality of infrastructure**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 1	1	1.1	1.6	1.6
2	4	4.5	6.3	7.9
3	22	25.0	34.9	42.9
4	25	28.4	39.7	82.5
5	11	12.5	17.5	100.0
Missing or N/A	25	28.4		
Total	88	100.0		

H. **Satisfaction with personal safety**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	4	4.5	6.0	6.0
2	6	6.8	9.0	14.9
3	28	31.8	41.8	56.7
4	22	25.0	32.8	89.6
5	7	8.0	10.4	100.0
Missing & N/A	21	23.9		
Total	88	100.0		

I. **Satisfaction with availability of information**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
2	2	2.3	3.0	3.0
3	11	12.5	16.4	19.4
4	34	38.6	50.7	70.1
5	20	22.7	29.9	100.0
Missing & N/A	21	23.9		
Total	88	100.0		

J. **Satisfaction with diversity of attractions**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 2	3	3.4	4.5	4.5
3	3	3.4	4.5	9.0
4	26	29.5	38.8	47.8
5	35	39.8	52.2	100.0
Missing & N/A	21	23.9		
Total	88	100.0		

K. **Satisfaction with value for money**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	2	2.3	3.0	3.0
2	2	2.3	3.0	6.0
3	14	15.9	20.9	26.9
4	25	28.4	37.3	64.2
5	24	27.3	35.8	100.0
Missing & N/A	21	23.9		
Total	88	100.0		

L. **Satisfaction with availability of activities**

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
	1	1	1.1	1.5	1.5
	2	2	2.3	3.0	4.5
	3	3	3.4	4.5	9.1
	4	33	37.5	50.0	59.1
	5	27	30.7	40.9	100.0
Missing	System	22	25.0		
Total		88	100.0		

M. **Satisfaction with shopping facilities**

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
	2	1	1.1	1.5	1.5
	3	8	9.1	12.3	13.8
	4	29	33.0	44.6	58.5
	5	27	30.7	41.5	100.0
Missing	& N/A	23	26.1		
Total		88	100.0		

N. **Satisfaction with quality of restaurants**

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
	2	2	2.3	3.0	3.0
	3	7	8.0	10.6	13.6
	4	25	28.4	37.9	51.5
	5	32	36.4	48.5	100.0
Missing	& N/A	22	25.0		
Total		88	100.0		

O. **Satisfaction with customs & immigration**

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
	1	3	3.4	5.3	5.3
	2	4	4.5	7.0	12.3
	3	14	15.9	24.6	36.8
	4	22	25.0	38.6	75.4
	5	14	15.9	24.6	100.0
Missing	& N/A	31	35.2		
Total		88	100.0		

Appendix IV: Frequency Tables for tourist importance ratings, 1: not at all important and 5: extremely important.

A. Importance of friendly staff

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	1.4	1.4
2	2	2.3	2.7	4.1
3	6	6.8	8.2	12.3
4	23	26.1	31.5	43.8
5	41	46.6	56.2	100.0
Missing & N A	15	17.0		
Total	88	100.0		

B. **Importance of safety & security**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	1.4	1.4
2	1	1.1	1.4	2.7
3	3	3.4	4.1	6.8
4	22	25.0	30.1	37.0
5	46	52.3	63.0	100.0
Missing & N/A	15	17.0		
Total	88	100.0		

C. **Importance of clean bathrooms**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	1.4	1.4
3	16	18.2	21.9	23.3
4	22	25.0	30.1	53.4
5	34	38.6	46.6	100.0
Missing & N/A	15	17.0		
Total	88	100.0		

D. **Importance of clean beds**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	1.4	1.4
3	5	5.7	6.9	8.3
4	23	26.1	31.9	40.3
5	43	48.9	59.7	100.0
Missing & N/A	16	18.2		
Total	88	100.0		

E. **Importance of overall cleanliness**

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
	1	1	1.1	1.4	1.4
	3	13	14.8	17.8	19.2
	4	31	35.2	42.5	61.6
	5	28	31.8	38.4	100.0
Missing	& N/A	15	17.0		
Total		88	100.0		

F. **Importance of lockers**

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
	1	3	3.4	4.2	4.2
	2	11	12.5	15.3	19.4
	3	22	25.0	30.6	50.0
	4	16	18.2	22.2	72.2
	5	20	22.7	27.8	100.0
Missing	& N/A	16	18.2		
Total		88	100.0		

G. **Importance of internet access**

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
	2	8	9.1	11.3	11.3
	3	25	28.4	35.2	46.5
	4	19	21.6	26.8	73.2
	5	19	21.6	26.8	100.0
Missing	& N/A	17	19.3		
Total		88	100.0		

H. **Importance of pay phones**

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
	1	16	18.2	23.2	23.2
	2	16	18.2	23.2	46.4
	3	26	29.5	37.7	84.1
	4	8	9.1	11.6	95.7
	5	3	3.4	4.3	100.0
Missing	System	19	21.6		
Total		88	100.0		

I. **Importance of medical bay**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	14	15.9	20.9	20.9
2	16	18.2	23.9	44.8
3	24	27.3	35.8	80.6
4	10	11.4	14.9	95.5
5	3	3.4	4.5	100.0
Missing & N/A	21	23.9		
Total	88	100.0		

J. **Importance of appearance**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	3	3.4	4.2	4.2
2	8	9.1	11.3	15.5
3	28	31.8	39.4	54.9
4	21	23.9	29.6	84.5
5	11	12.5	15.5	100.0
Missing & N/A	17	19.3		
Total	88	100.0		

K. **Importance of cost**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	1.4	1.4
2	4	4.5	5.5	6.8
3	6	6.8	8.2	15.1
4	26	29.5	35.6	50.7
5	36	40.9	49.3	100.0
Missing & N/A	15	17.0		
Total	88	100.0		

L. **Importance of staff knowledge of local attractions and activities**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	1.4	1.4
2	5	5.7	6.8	8.2
3	10	11.4	13.7	21.9
4	29	33.0	39.7	61.6
5	28	31.8	38.4	100.0
Missing & N/A	15	17.0		
Total	88	100.0		

M. **Importance of friendly guests**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	2	2.3	2.7	2.7
2	5	5.7	6.8	9.6
3	18	20.5	24.7	34.2
4	26	29.5	35.6	69.9
5	22	25.0	30.1	100.0
Missing & N/A	15	17.0		
Total	88	100.0		

N. **Importance of 'close to attractions'**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	1.4	1.4
2	4	4.5	5.6	7.0
3	18	20.5	25.4	32.4
4	31	35.2	43.7	76.1
5	17	19.3	23.9	100.0
Missing & N/A	17	19.3		
Total	88	100.0		

O. **Importance of 'close to transport'**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	1.4	1.4
2	5	5.7	7.0	8.5
3	13	14.8	18.3	26.8
4	34	38.6	47.9	74.6
5	18	20.5	25.4	100.0
Missing & N/A	17	19.3		
Total	88	100.0		

P. **Importance of shuttle service**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	6	6.8	8.6	8.6
2	20	22.7	28.6	37.1
3	16	18.2	22.9	60.0
4	17	19.3	24.3	84.3
5	11	12.5	15.7	100.0
Missing & N/A	18	20.5		
Total	88	100.0		

Q. **Importance of tour booking service**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	6	6.8	8.6	8.6
2	15	17.0	21.4	30.0
3	19	21.6	27.1	57.1
4	17	19.3	24.3	81.4
5	13	14.8	18.6	100.0
Missing & N/A	18	20.5		
Total	88	100.0		

R. **Importance of advance booking service**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	5	5.7	7.2	7.2
2	13	14.8	18.8	26.1
3	19	21.6	27.5	53.6
4	18	20.5	26.1	79.7
5	14	15.9	20.3	100.0
Missing & N/A	19	21.6		
Total	88	100.0		

S. **Importance of parking facilities**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	22	25.0	31.9	31.9
2	11	12.5	15.9	47.8
3	13	14.8	18.8	66.7
4	14	15.9	20.3	87.0
5	9	10.2	13.0	100.0
Missing & N/A	19	21.6		
Total	88	100.0		

T. **Importance of laundry facilities**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	3	3.4	4.4	4.4
2	12	13.6	17.6	22.1
3	22	25.0	32.4	54.4
4	18	20.5	26.5	80.9
5	13	14.8	19.1	100.0
Missing & N/A	20	22.7		
Total	88	100.0		

U. **Importance of swimming pool**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	16	18.2	22.9	22.9
2	17	19.3	24.3	47.1
3	26	29.5	37.1	84.3
4	4	4.5	5.7	90.0
5	7	8.0	10.0	100.0
Missing & N/A	18	20.5		
Total	88	100.0		

V. **Importance of satellite TV**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	20	22.7	29.4	29.4
2	17	19.3	25.0	54.4
3	24	27.3	35.3	89.7
4	3	3.4	4.4	94.1
5	4	4.5	5.9	100.0
Missing & N/A	20	22.7		
Total	88	100.0		

W. **Importance of availability of information**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	1.4	1.4
2	6	6.8	8.6	10.0
3	22	25.0	31.4	41.4
4	23	26.1	32.9	74.3
5	18	20.5	25.7	100.0
Missing & N/A	18	20.5		
Total	88	100.0		

X. **Importance of onsite restaurant**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	8	9.1	11.1	11.1
2	14	15.9	19.4	30.6
3	24	27.3	33.3	63.9
4	19	21.6	26.4	90.3
5	7	8.0	9.7	100.0
Missing & N/A	16	18.2		
Total	88	100.0		

Y. **Importance of onsite bar**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	4	4.5	5.6	5.6
2	6	6.8	8.5	14.1
3	16	18.2	22.5	36.6
4	20	22.7	28.2	64.8
5	25	28.4	35.2	100.0
Missing & N/A	17	19.3		

Y. **Importance of onsite bar**

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	4	4.5	5.6	5.6
2	6	6.8	8.5	14.1
3	16	18.2	22.5	36.6
4	20	22.7	28.2	64.8
5	25	28.4	35.2	100.0
Missing & N/A	17	19.3		
Total	88	100.0		

Appendix V: Frequency tables for performance ratings from the tourists' viewpoint. 1: Poor; 5: Excellent

A. Performance on friendly staff

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
	2	1	1.1	1.6	1.6
	3	2	2.3	3.2	4.8
	4	31	35.2	50.0	54.8
	5	28	31.8	45.2	100.0
Missing	& N/A	26	29.5		
Total		88	100.0		

B. Performance on safety and security

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
	1	1	1.1	1.6	1.6
	2	4	4.5	6.5	8.1
	3	19	21.6	30.6	38.7
	4	24	27.3	38.7	77.4
	5	14	15.9	22.6	100.0
Missing	& N/A	26	29.5		
Total		88	100.0		

C. Performance on clean bathrooms

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	2	2	2.3	3.3	3.3
	3	13	14.8	21.3	24.6
	4	26	29.5	42.6	67.2
	5	20	22.7	32.8	100.0
	Total	61	69.3	100.0	
Missing	System	27	30.7		
Total		88	100.0		

D. Performance on clean beds

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
	1	1	1.1	1.7	1.7
	2	1	1.1	1.7	3.4
	3	7	8.0	11.9	15.3
	4	24	27.3	40.7	55.9
	5	26	29.5	44.1	100.0
Missing	& N/A	29	33.0		
Total		88	100.0		

E. Performance on overall cleanliness

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
2	1	1.1	1.6	1.6
3	12	13.6	19.7	21.3
4	26	29.5	42.6	63.9
5	22	25.0	36.1	100.0
Missing & N/A	27	30.7		
Total	88	100.0		

F. Performance on lockers

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	1.8	1.8
2	4	4.5	7.0	8.8
3	16	18.2	28.1	36.8
4	22	25.0	38.6	75.4
5	14	15.9	24.6	100.0
Missing & N/A	31	35.2		
Total	88	100.0		

G. Performance on internet access

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	2	2.3	3.3	3.3
2	4	4.5	6.7	10.0
3	17	19.3	28.3	38.3
4	23	26.1	38.3	76.7
5	14	15.9	23.3	100.0
Missing & N/A	28	31.8		
Total	88	100.0		

H. Performance on pay phones

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	2.0	2.0
2	9	10.2	17.6	19.6
3	11	12.5	21.6	41.2
4	24	27.3	47.1	88.2
5	6	6.8	11.8	100.0
Missing & N/A	37	42.0		
Total	88	100.0		

I. Performance on medical bay

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	2	2.3	4.3	4.3
2	7	8.0	15.2	19.6
3	23	26.1	50.0	69.6
4	11	12.5	23.9	93.5
5	3	3.4	6.5	100.0
Missing & N/A	42	47.7		
Total	88	100.0		

J. Performance of appearance

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
3	8	9.1	12.9	12.9
4	33	37.5	53.2	66.1
5	21	23.9	33.9	100.0
Missing & N/A	26	29.5		
Total	88	100.0		

K. Performance on cost

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	1.5	1.5
2	6	6.8	9.0	10.4
3	11	12.5	16.4	26.9
4	31	35.2	46.3	73.1
5	18	20.5	26.9	100.0
Missing & N/A	21	23.9		
Total	88	100.0		

L. Performance on staff knowledge

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
2	5	5.7	7.8	7.8
3	7	8.0	10.9	18.8
4	22	25.0	34.4	53.1
5	30	34.1	46.9	100.0
Missing & N/A	24	27.3		
Total	88	100.0		

M. Performance on friendly guests

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
2	6	6.8	9.2	9.2
3	17	19.3	26.2	35.4
4	22	25.0	33.8	69.2
5	20	22.7	30.8	100.0
Missing & N/A	23	26.1		
Total	88	100.0		

N. Performance on ‘close to attractions’

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
2	2	2.3	3.0	3.0
3	12	13.6	18.2	21.2
4	34	38.6	51.5	72.7
5	18	20.5	27.3	100.0
Missing & N/A	22	25.0		
Total	88	100.0		

O. Performance on ‘close to transport’

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
2	1	1.1	1.7	1.7
3	15	17.0	25.0	26.7
4	23	26.1	38.3	65.0
5	21	23.9	35.0	100.0
Missing & N/A	28	31.8		
Total	88	100.0		

P. Performance on ‘shuttle transport on site’

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	3	3.4	5.5	5.5
2	8	9.1	14.5	20.0
3	12	13.6	21.8	41.8
4	19	21.6	34.5	76.4
5	13	14.8	23.6	100.0
Missing & N/A	33	37.5		
Total	88	100.0		

Q. Performance on tour booking facilities

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	1	1.1	1.7	1.7
2	4	4.5	6.8	8.5
3	7	8.0	11.9	20.3
4	23	26.1	39.0	59.3
5	24	27.3	40.7	100.0
Missing & N/A	29	33.0		
Total	88	100.0		

R. Performance on advance booking facilities

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	2	2.3	3.4	3.4
2	5	5.7	8.5	11.9
3	7	8.0	11.9	23.7
4	26	29.5	44.1	67.8
5	19	21.6	32.2	100.0
Missing & N/A	29	33.0		
Total	88	100.0		

S. Performance on parking facilities

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	3	3.4	5.3	5.3
2	8	9.1	14.0	19.3
3	17	19.3	29.8	49.1
4	21	23.9	36.8	86.0
5	8	9.1	14.0	100.0
Missing & N/A	31	35.2		
Total	88	100.0		

T. Performance on laundry

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	2	2.3	3.6	3.6
2	3	3.4	5.4	8.9
3	16	18.2	28.6	37.5
4	23	26.1	41.1	78.6
5	12	13.6	21.4	100.0
Missing & N/A	32	36.4		
Total	88	100.0		

U. Performance on 'swimming pool'

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	7	8.0	11.9	11.9
2	9	10.2	15.3	27.1
3	15	17.0	25.4	52.5
4	17	19.3	28.8	81.4
5	11	12.5	18.6	100.0
Missing & N/A	29	33.0		
Total	88	100.0		

V. Performance on satellite TV

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
1	5	5.7	9.3	9.3
2	8	9.1	14.8	24.1
3	20	22.7	37.0	61.1
4	13	14.8	24.1	85.2
5	8	9.1	14.8	100.0
Missing & N/A	34	38.6		
Total	88	100.0		

W. Performance on 'availability of tourists information'

Rating	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 2	4	4.5	6.3	6.3
3	7	8.0	10.9	17.2
4	23	26.1	35.9	53.1
5	30	34.1	46.9	100.0
Missing & N/A	24	27.3		
Total	88	100.0		

X. Performance on restaurant

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
1		3	3.4	4.9	4.9
2		7	8.0	11.5	16.4
3		11	12.5	18.0	34.4
4		26	29.5	42.6	77.0
5		14	15.9	23.0	100.0
Missing	& N/A	27	30.7		
Total		88	100.0		

Y. Performance on bar

Rating		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	1.1	1.6	1.6
	2	6	6.8	9.4	10.9
	3	6	6.8	9.4	20.3
	4	28	31.8	43.8	64.1
	5	23	26.1	35.9	100.0
Missing	& N/A	24	27.3		
Total		88	100.0		

Appendix VI:

Backpacking and Youth Tourism Investigative Study Questionnaire: Demand-side (Have visited)

Section 1: General, customer and trip related

In this study a backpacker is defined as a person who spent at least one night in either backpacker or hostel accommodation. One doesn't necessarily have to have spent all nights of their trip in backpacker accommodation but may also have stay in other types of accommodation.

1. Have you taken a backpacking trip to Cape Town in the last 12 months?
   ( ) Yes-Go to question 3
   ( ) No-Go to question 2
2. Was your trip in the last 24 months?
   ( ) Yes- continue to question 3
   ( ) No- end interview
3. What is your country of origin?_________________
4. What is your Province/State of origin?____________
5. Including this trip, how many times have you been to Cape Town in the last five years?
   ____
6. Name the other destinations you were considering before settling for Cape Town.
   ____
7. How long before your visit did you decide on Cape Town?_____________________________
8. How did you hear about Cape Town?
   ( ) Already knew of it
   ( ) Internet.
   ( ) Friends and relatives.
   ( ) Media.
   ( ) Books and guides.
   ( ) Travel agency.
   ( ) Fairs and/or exhibitions.
   ( ) It was part of a travel package.
   ( ) Other: specify_____________________
9. Did you plan the trip yourself or you made use of a travel agent? ( ) Self ( ) Travel agent ( ) Other
10. What were your main sources of information during trip planning?
    ( ) Internet
    ( ) Media
    ( ) Books and magazines
    ( ) Lonely Planet
    ( ) Friends and family
    ( ) Other: specify
11. What was the main reason for the visit?
    ( ) Visiting relatives and friends.
    ( ) Business reasons.
    ( ) Attending a conference, meeting, exhibition
    ( ) Holiday
    ( ) Sports event
    ( ) Health.
    ( ) Religious reasons.
    ( ) Volunteerism
    ( ) Other: specify
    ____
12. Your mode of transport **to Cape Town** was:
    ( ) Air
    ( ) Rail
    ( ) Car
    ( ) Sea: cruise/ship
    ( ) Bus
    ( ) Other: Specify
13. Your mode of transport **within** the destination was:
    ( ) Rental car
    ( ) Own car
    ( ) Public transport
    ( ) Metered taxis
    ( ) Commuter taxis
    ( ) Tour bus
    ( ) Bicycle
    ( ) Foot
    ( ) Other: Specify
14. Including yourself, how many people were in your travel group?_____________________________
15. How many were children under the age of 18?______
16. Where in Cape Town did you stay during your trip?
    ____
17. Which accommodation type/s did you use?
    ( ) Backpacker hostel
    ( ) B & B
    ( ) Guest House
    ( ) Friends and relatives
    ( ) Hotel
    ( ) Rental apartment or home
    ( ) Camping
    ( ) other: specify

18. How many nights did you spend in Cape Town on this trip?________________________________

19. List other destinations you visited **before** Cape Town on the same trip.____________________________

20. List other destinations you visited **after** Cape Town on the same trip________________________________

21. Which activities did you participate in, in Cape Town?
    ( ) Hiking
    ( ) Biking
    ( ) Clubbing
    ( ) Wine tours
    ( ) Shopping
    ( ) Township tours
    ( ) Visiting museums & historical sights
    ( ) Game viewing
    ( ) Visiting natural sights
    ( ) Whale watching
    ( ) Other: specify

22. Which of the following sites did you visit?
    ( ) Robben Island
    ( ) Table mountain cable-way
    ( ) Table Mountain National Park
    ( ) Cape Point
    ( ) V & A Waterfront
    ( ) Kirstenbosch Botanical Gardens
    ( ) Cape of Good Hope
    ( ) Green market square
    ( ) Wine Routes
    ( ) Townships
    ( ) Others: Specify

23. Excluding long distance transport costs to and from Cape Town, how much did your group spend in Cape Town during your trip, in South African Rands?_____

24. In the Table below, please state how much you spent by category.

Item	Spend (in S.A. Rands)
Accommodation	
Food & Beverages	
Transport in destination	
Entertainment: entrance fees (theatres, cinemas, etc)	
Shopping (gifts & souvenirs)	
Other: specify	

25. In the table below please state the **IMPORTANCE** of each of the accommodation attributes to you, on a scale of 1-5. 1 being 'not important at all' and 5 being 'extremely important.'

Attribute	**Importance** Rate the importance of each of the accommodation attributes to you on a scale of 1-5 1: not important all 5: extremely important					
Friendly staff	1	2	3	4	5	N/A
Safety and security	1	2	3	4	5	N/A
Clean bathrooms	1	2	3	4	5	N/A
Clean beds	1	2	3	4	5	N/A
Overall cleanliness	1	2	3	4	5	N/A
Lockers	1	2	3	4	5	N/A
Internet access	1	2	3	4	5	N/A
Pay phones	1	2	3	4	5	N/A
Medical bay	1	2	3	4	5	N/A
Appearance	1	2	3	4	5	N/A
Cost	1	2	3	4	5	N/A
Staff knowledge of local activities and attractions	1	2	3	4	5	N/A
Friendly guests	1	2	3	4	5	N/A
Close to attractions	1	2	3	4	5	N/A
Close to transport	1	2	3	4	5	N/A
Shuttle transport on-site	1	2	3	4	5	N/A
Tour booking service	1	2	3	4	5	N/A
Advance booking facilities	1	2	3	4	5	N/A
Parking facilities	1	2	3	4	5	N/A
Laundry facilities	1	2	3	4	5	N/A
Swimming pool	1	2	3	4	5	N/A
Satellite TV	1	2	3	4	5	N/A
Availability of tourist information	1	2	3	4	5	N/A
Restaurant	1	2	3	4	5	N/A
Bar	1	2	3	4	5	N/A

26. Prior to visiting Cape Town what were your perceptions on the following destination attributes: **Circle your choice.**

Attribute	Rating 1: Poor 5: Excellent
Service delivery	1 2 3 4 5 N/A
Accessibility	
Quality of accommodation	
Overall cleanliness	
Friendliness of the people	
Public transportation	
Quality of infrastructure	
Personal safety & security	
Availability of information	
Diversity of attractions	
Value for money	
Availability of activities	
Shopping possibilities	
Quality of restaurants	
Customs and immigration	

27. Now that you have visited Cape Town will you rate your **SATISFACTION** with each of these attributes, on a scale of 1-5.1 being 'extremely dissatisfied' and 5 being 'very satisfied.'

Attribute	Rating 1: extremely dissatisfied 5: very satisfied
Service delivery	1 2 3 4 5 N/A
Accessibility	
Quality of accommodation	
Overall cleanliness	
Friendliness of the people	
Public transportation	
Quality of infrastructure	
Personal safety & security	
Availability of information	
Diversity of attractions	
Value for money	
Availability of activities	
Shopping possibilities	
Quality of restaurants	
Customs and immigration	

28. What was the underlying motive for you to take that trip?
( ) To escape from a busy life
( ) To explore new places
( ) To socialize and enhance relationships
( ) To relax
( ) For prestige
( ) To learn about other places and cultures
( ) Other: specify

29. How often do you take trips longer than 5 nights?

30. What did you enjoy **most** in/about Cape Town?

31. What did you **dislike most** about Cape Town?

32. Will you consider revisiting Cape Town in the future?
( ) Yes ( ) No ( ) Maybe

33. Will you recommend Cape Town to your friends, family and colleagues? ( ) Yes ( ) No

34. In the table below please rate the destination's **PERFORMANCE** on each of the following accommodation attributes on a scale of 1-5. 1 being 'very poor' and 5 being 'excellent..' **Circle your choice**.

Attribute	Performance Rate the destination's performance on each of these attributes on a scale of 1-5 1: very poor 5: excellent
Friendly staff	1 2 3 4 5 N/A
Safety and security	1 2 3 4 5 N/A
Clean bathrooms	1 2 3 4 5 N/A
Clean beds	1 2 3 4 5 N/A
Overall cleanliness	1 2 3 4 5 N/A
Lockers	1 2 3 4 5 N/A
Internet access	1 2 3 4 5 N/A
Pay phones	1 2 3 4 5 N/A
Medical bay	1 2 3 4 5 N/A
Appearance	1 2 3 4 5 N/A
Cost	1 2 3 4 5 N/A
Staff knowledge of local activities and attractions	1 2 3 4 5 N/A
Friendly guests	1 2 3 4 5 N/A
Close to attractions	1 2 3 4 5 N/A
Close to transport	1 2 3 4 5 N/A
Shuttle transport on-site	1 2 3 4 5 N/A
Tour booking service	1 2 3 4 5 N/A
Advance booking facilities	1 2 3 4 5 N/A
Parking facilities	1 2 3 4 5 N/A
Laundry facilities	1 2 3 4 5 N/A
Swimming pool	1 2 3 4 5 N/A
Satellite TV	1 2 3 4 5 N/A
Availability of tourist information	1 2 3 4 5 N/A
Restaurant	1 2 3 4 5 N/A
Bar	1 2 3 4 5 N/A

Section 2: Personal information

In-order for us to classify the information and effectively segment responses this section covers some personal information. This information will be handled and analysed anonymously.

35. Please state your gender ( ) Male ( ) Female

36. In which of the following age groups do you belong?
    ( ) under 20
    ( ) 20-20
    ( ) 25-39
    ( ) 30-34
    ( ) 35-39
    ( ) 40-49
    ( ) 50-59
    ( ) 60-65
    ( ) over 65

37. What is the highest level of education attained?
    ( ) No formal education
    ( ) High school
    ( ) Some college, but didn't complete
    ( ) College diploma
    ( ) Undergraduate degree
    ( ) Postgraduate degree
    ( ) Other: specify

38. What is your monthly salary range, in US$?
    ( ) less than US$1 000
    ( ) US$1 000-US$ 2 000
    ( ) US$2 100-US$ 3 000
    ( ) US$3 100-US$ 4 000
    ( ) US$4 100-US$ 5 000
    ( ) US$5 100-US$ 10 000
    ( ) more than US$ 10 000

39. Are you currently?
    ( ) In school
    ( ) Employed
    ( ) Retired

40. In which ethnic group do you belong?
    ( ) Asian
    ( ) Pacific/Islander
    ( ) Black
    ( ) Caucasian
    ( ) Hispanic
    ( ) Other: specify

Thank you very much for your participation in this study

Appendix VII:
<u>Backpacking and Youth Tourism Investigative Study Questionnaire: Demand-side</u> <u>(Have not visited)</u>

<u>Section 1: General, customer and trip related</u>

In this study a backpacker is defined as a person who spent at least one night in either backpacker or hostel accommodation. One doesn't necessarily have to have spent all nights of their trip in backpacker accommodation but may also have stay in other types of accommodation.

41. Have you taken a backpacking trip in the last 12 months?
    ( ) Yes-Go to question 3
    ( ) No-Go to question 2

42. Was your trip in the last 24 months?
    ( ) Yes- continue to question 3
    ( ) No- end interview

43. Which destination/s did you visit during your last trip?___________________________________

44. Was Cape Town on your list of possible destinations?
    ( ) Yes-go to question 5
    ( ) No-go to question 6

45. What other destinations were on your consideration list that you didn't visit?________________________

46. Why did you decide not to visit Cape Town?___________

47. What is your country of residence?_______________

48. What is your Province/State of origin?_____________

49. What are your main sources of information during trip planning?
    ( ) Internet
    ( ) Media
    ( ) Books and magazines
    ( ) Lonely Planet
    ( ) Friends and family
    ( ) Other: specify

50. Which activities do you participate during your trips?
    ( ) Hiking
    ( ) Biking
    ( ) Clubbing
    ( ) Wine tours
    ( ) Shopping
    ( ) Cultural tours
    ( ) Game viewing
    ( ) Visiting museums & historical sights
    ( ) Game viewing
    ( ) Visiting natural sights
    ( ) Other: specify

51. How often do you take trips longer than 5 nights?

    ____

52. Will you consider visiting Cape Town in the future?
    ( ) Yes ( ) No ( ) Maybe

53. In the table below please state the **IMPORTANCE** of each of the accommodation attributes to you, on a scale of 1-5. 1 being 'not important at all' and 5 being 'extremely important.'

Attribute	**Importance** Rate the importance of each of the accommodation attributes to you on a scale of 1-5 1: not important all 5: extremely important					
Friendly staff	1	2	3	4	5	N/A
Safety and security	1	2	3	4	5	N/A
Clean bathrooms	1	2	3	4	5	N/A
Clean beds	1	2	3	4	5	N/A
Overall cleanliness	1	2	3	4	5	N/A
Lockers	1	2	3	4	5	N/A
Internet access	1	2	3	4	5	N/A
Pay phones	1	2	3	4	5	N/A
Medical bay	1	2	3	4	5	N/A
Appearance	1	2	3	4	5	N/A
Cost	1	2	3	4	5	N/A
Staff knowledge of local activities and attractions	1	2	3	4	5	N/A
Friendly guests	1	2	3	4	5	N/A
Close to attractions	1	2	3	4	5	N/A
Close to transport	1	2	3	4	5	N/A
Shuttle transport on-site	1	2	3	4	5	N/A
Tour booking service	1	2	3	4	5	N/A
Advance booking facilities	1	2	3	4	5	N/A
Parking facilities	1	2	3	4	5	N/A
Laundry facilities	1	2	3	4	5	N/A
Swimming pool	1	2	3	4	5	N/A
Satellite TV	1	2	3	4	5	N/A
Availability of tourist information	1	2	3	4	5	N/A
Restaurant	1	2	3	4	5	N/A
Bar	1	2	3	4	5	N/A

54. What are your perceptions about Cape Town on the following destination attributes on a scale of 1-5: 1 being 'Poor' and 5 being 'Excellent.'

Circle your choice.

Attribute	**Rating** 1: Poor 5: Excellent
Service delivery	1 2 3 4 5 N/A
Accessibility	1 2 3 4 5 N/A
Quality of accommodation	1 2 3 4 5 N/A
Overall cleanliness	1 2 3 4 5 N/A
Friendliness of the people	1 2 3 4 5 N/A
Public transportation	1 2 3 4 5 N/A
Quality of infrastructure	1 2 3 4 5 N/A
Personal safety & security	1 2 3 4 5 N/A
Availability of information	1 2 3 4 5 N/A
Diversity of attractions	1 2 3 4 5 N/A
Value for money	1 2 3 4 5 N/A
Availability of activities	1 2 3 4 5 N/A
Shopping possibilities	1 2 3 4 5 N/A
Quality of restaurants	1 2 3 4 5 N/A
Customs and immigration	1 2 3 4 5 N/A

<u>Section 2: Personal information</u>

In-order for us to classify the information and effectively segment responses this section covers some personal information. This information will be handled and analysed anonymously.

55. Please state your gender ( ) Male ( ) Female
56. In which of the following age groups do you belong?
( ) under 20
( ) 20-20
( ) 25-39
( ) 30-34
( ) 35-39
( ) 40-49
( ) 50-59
( ) 60-65
( ) over 65

57. What is the highest level of education attained?
( ) No formal education
( ) High school
( ) Some college, but didn't complete
( ) College diploma
( ) Undergraduate degree
( ) Postgraduate degree
( ) Other: specify

58. Are you currently?
( ) In school
( ) Employed
( ) Retired

59. What is your monthly salary range, in US$?
( ) less than US$1 000
( ) US$1 000-US$ 2 000
( ) US$2 100-US$ 3 000
( ) US$3 100-US$ 4 000
( ) US$4 100-US$ 5 000
( ) US$5 100-US$ 10 000
( ) more than US$ 10 000

60. In which ethnic group do you belong?
( ) Asian
( ) Pacific/Islander
( ) Black
( ) Caucasian
( ) Hispanic
( ) Other: specify

Thank you very much for participating in this study

Appendix VIII:

Backpacking and Youth Investigative Study Supply-side questionnaire (Lodging)

Section 1: General & business-related information

1. In which Cape Town Tourism region do you belong?
   ( ) South Atlantic Coast (CTS)
   ( ) Central Atlantic Coast (CTCC)
   ( ) North-east Atlantic Coast (CTNE)

2. What category is your lodging establishment?
   ( ) Hotel
   ( ) Bed and Breakfast (B&B)
   ( ) Guest House
   ( ) Backpacker Hostel
   ( ) Home Stay
   ( ) Other (specify)__________________________________

3. Do you consider your business to be a backpacking service provider? ( ) Yes ( ) No

4. What proportion/percentage of your business comes from backpackers in a typical month?________________

5. What Grade is your establishment
   ( ) Not graded
   ( ) 1 star
   ( ) 2 star
   ( ) 3 star
   ( ) 4 star
   ( ) 5 star

6. What is the size of your establishment in number of rooms?___________

7. How old is your establishment in years?_________________

8. How can you describe the general trend of your business in the past 5 years?
   ( ) Declining
   ( ) The same
   ( ) Increasing
   ( ) No particular systematic trend
   ( ) Other (specify)____________________________________

9. List three channels through which you most frequently advertise/promote your business and rank them in terms of the amount of business they bring (1-3: most to least). Insert N/A if you don't advertise.

Most frequently used advertising/promotion channel	Rank
1.	
2.	
3.	

10. You receive the bulk of your bookings through:
    ( ) internet
    ( ) telephone
    ( ) e-mail
    ( ) fax
    ( ) Other: please specify

11. What is the usual seasonal average occupancy for your establishment?

Summer (Nov-Feb)	Autumn (Mar-May)	Winter (Jun-Aug)	Spring (Sep-Oct)
( ) less than 25%	( ) less than 25%	( ) less than 25%	( ) less than 25%
( ) 26%-50%	( ) 26%-50%	( ) 26%-50%	( ) 26%-50%
( ) 51-75%	( ) 51-75%	( ) 51-75%	( ) 51-75%
( ) Over 75%	( ) Over 75%	( ) Over 75%	( ) Over 75%
( ) Other: please specify	( ) Other: please specify	( ) Other: please specify	( ) Other: please specify

12. What season do you usually get the highest room rates?____

13. In the Table below list the top three source markets for each season for your business? (country &/or region)

Summer (Nov-Feb)	**Autumn (Mar-May)**	**Winter (Jun-Aug)**	**Spring (Sep-Oct)**
1.__________	1.______________________	1.______________________	1.______________________
2.__________	2.______________________	2.______________________	2.______________________
3.__________	3.	3.	3.

Section 2: Customer related

14. How would you classify your typical customer/ client?

Gender	**Age**	**Socio-economic status**
	( )Younger adults: under 25	
( )Female	( )Young: 25-34	( )Low
( )Male	( )Middle age: 35-49	( )Medium
( )Both	( )Older: 50-64	( )High
	( )Retired: 65+	( )Very high

15. Are your clients mostly?
    ( ) Domestic
    ( ) African (excluding domestic)
    ( ) European
    ( ) Asian
    ( ) North American
    ( ) South American
    ( ) Other (specify)___________________________________

16. Your clients mostly travel
    ( ) alone
    ( ) in pairs/couples
    ( ) in small groups: less than ten people
    ( ) big groups: more than ten people

17. Rank the following in terms of your yield(return) per customer/per night (1 through 7: highest to lowest, ties are possible)
    ( ) Domestic
    ( ) Africa (excluding domestic)
    ( ) European
    ( ) Asian
    ( ) North American
    ( ) South American
    ( ) Don't know

18. Your clients mostly:
    ( ) are weekend guests

( ) have short length of stay: less than 6 nights
( ) have average length of stay: 7-14 nights
( ) have long length of stay: 15 nights and more
( ) Other: specify

19. Advance booking times are said to differ by origin of visitor. Please indicate how far in advance you mostly receive the bulk of your bookings from the different source markets given below: Indicate your choice with an X of tick.

Source market	Walk-in	1 week	2 weeks	1 month	3 months	6 months	9 months	12 months	More than 12 months	Other: specify
Domestic										
Africa										
Europe										
North America										
South America										
Asia										
Australasia										

20. Please list the top five source **countries** from which your business got the highest return per visitor in 2008

1.
2.
3.
4.
5.

21. In the following Table some backpacker accommodation attributes are presented. According to your experience please rate what you perceive to be the importance of each of these attributes to your customers/clients on a scale of 1-5: 1 being 'not important all' and 5 being 'extremely important.' In the second column of the same table please rate yourself on how you believe you perform delivering service on each of these attributes on a scale of 1-5: 1 being 'very poor' and 5 being 'excellent.' **Circle your choice on each.**

Attribute	**Importance** Rate perceived importance of each of the attributes to your customers on a scale of 1-5 1: not important all 5: extremely important						**Performance** Rate your performance on each of these attributes on a scale of 1-5 1: very poor 5: excellent					
Friendly staff	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Safety and security	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Clean bathrooms	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Clean beds	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Overall cleanliness	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Lockers	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Internet access	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Pay phones	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Medical bay	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Appearance	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Cost	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Staff knowledge of local activities and attractions	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Friendly guests	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Close to attractions	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Close to transport	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Shuttle transport on-site	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Tour booking service	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Advance booking facilities	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Parking facilities	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Laundry facilities	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Swimming pool	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Satellite TV	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Availability of tourist information	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Restaurant	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Bar	1	2	3	4	5	N/A	1	2	3	4	5	N/A

Section 3: Additional information

22. How many employees does your establishment have? Complete the table below.

Full time	Part-time	Contract	Seasonal	Total

23. List 3 things you consider to be the main challenges for the growth & development of backpacking tourism in Cape Town?
    1.
    2.
    3.

24. Government commitment to the development & promotion of Backpacking tourism in Cape Town has been:
    ( ) lacking
    ( ) minimal
    ( ) average
    ( ) good
    ( ) excellent
    ( ) Other: please specify

25. List 5 things you consider to be of high priority that should be implemented to improve Backpacking tourism in Cape Town
    1.
    2.
    3.
    4.
    5.

26. In your view, in the next 3-5years Backpacking tourism in Cape Town is likely to:
    ( ) Grow substantially
    ( ) grow modestly
    ( ) remain the same
    ( ) decline
    ( ) don't know

27. In-order for us to conduct trend analysis we will need more data on performance of the sector over a period of time. Are you willing and able to provide us with additional information in form of secondary data from your records? ( ) Yes ( ) No

28. If yes which of the following will you be able to provide?
    ( ) Average room rates statistics
    ( ) Average occupancy rates statistics
    ( ) Tour bookings figures
    ( ) Tour sales figures
    ( ) Restaurant sales figures
    ( ) Other: please specify

Thank you for your participation in this study. Your co-operation is greatly appreciated.

Appendix VIX

Backpacking Supply-side questionnaire: Attractions

General Information

1. In which Cape Town tourism region is the attraction located?
   ( ) South Atlantic Coast (CTS)
   ( ) Central Atlantic Coast (CTCC)
   ( ) North-east Atlantic Coast (CTNE)
2. How old is this attraction, in years?__________
3. How many employees does the attraction have?

Full time	Part-time	Contract	Seasonal	Total

4. Is your attraction accessible (i.e. handicap friendly)? ( ) Yes ( ) No

5. Is entry to your attraction free? ( ) Yes ( ) No

6. If No, what is the current entrance fee for a South African adult in Rands?

7. By how much has this fee increased from same time last year (Rands)?___________

8. Does the attraction have an environmental protection and sustainability policy?_______

9. Is this attraction open?
   ( ) All year round
   ( ) Seasonally
   ( ) Other: please specify

10. Please indicate (√) the level of use of the attraction for each season in the Table below:

Level of use	Summer Nov-Feb	Autumn Mar-May	Winter Jun-Aug	Spring Sep-Oct
>90%				
70%-90%				
50%-70%				
<50%				
Not open this season				

11. Under which category does your attraction belong?
   ( ) Adventure tourism
   ( ) Wine & cuisine tourism
   ( ) Culture/heritage
   ( ) eco & nature
   ( ) health & wellness
   ( ) Other: specify___________________________

Customer related

12. How would you classify your typical customer?

Gender	**Age**
	( )Younger adults: under 25
( )Female	( )Young: 25-34
( )Male	( )Middle age: 35-49
( )Both	( )Older: 50-64
	( )Retired: 65+

13. What are the top five visitor attractions to this site?
   1.
   2.
   3.
   4.
   5.

14. Which of the following activities/services does your attraction offer? Tick all possible.

Land-based	Water based	other
( ) hiking	( ) swimming	( ) Shopping (souvenirs)
( ) mountaineering	( ) canoeing	( ) equipment rental
( ) bicycling	( ) cage diving	( ) picnicking
( ) quad-biking	( ) rafting	( ) restaurant
( ) hunting	( ) kayaking	( ) events hosting
( ) wildlife viewing	( ) boating	( ) other: specify
( ) bird watching	( )other	
( ) camping		
( ) bungi jumping		
( ) Other: specify		

15. In your view does Cape Town have sufficient such attractions for visitors?
   ( ) Yes ( ) No
16. Business for the attraction in the past 3 years has been:
   ( ) Declining
   ( ) the same
   ( ) Growing
   ( ) no particular trend
   ( ) Other: specify

17. From which source market/s do you get most of your business/visitation? State approximate annual percentage.

Market	Approximate %/year
Domestic	
African (excluding domestic)	
Europe	
Asia & Australasia	
North America	
South America	
Other: Specify	

18. List the top 5 challenges for the attraction.
   1.
   2.
   3.
   4.
   5.
19. List what you consider as the top 3 development priorities to improve visitation to the attraction:
   1.
   2.
   3.

Additional information

20. In-order for us to conduct trend analysis we will need more performance data for over a period of time. Which of the following will you be able to provide?
   ( ) Entrance ticket sales figures
   ( ) Attraction visitation numbers
   ( ) Other: please speci

Thank you very much for participating in this study

Appendix X:

Backpacking Supply-side questionnaire: Tour Operator/transport

General Information

21. How old is your business, in years?__________
22. How big is your company, number of employees?___
23. Does your company require that tour guides be certified? ( ) Yes ( ) No
24. Please state any professional and/or industry certification/accreditation that your company holds?
25. Please indicate the area of focus of your business by stating the approximate percentage below: Insert 0% or leave blank if you don't offer.

Business focus	Approximate % of business
Inbound	
Outbound	
Other: please specify	

26. Which of the following does your company own:
( ) Air transportation
( ) Ground transportation
( ) Accommodation
( ) Other: please specify
27. What kinds of services does your company provide? Please state approximate Percentages. Insert 0% or leave blank if you don't offer service.

Service	**Approximate %**
Guided tours	
Just transport	
Flight bookings	
Packaged tours	
Hotel reservations	
Other: specify	

28. What do you specialise in?
( ) Group tours
( ) Private tours
( ) Other: Please specify
29. Please list the different languages that your company can offer services in:
30. Do you have a documented company plan for emergencies such as accidents and others?
( ) Yes ( ) No

Customer related

31. What are the most popular Cape Town tours that your company is involved in? State approximate percentages in a typical month:

Activity	Approximate %
Adventure tours	
Wine tours	
Township tours	
Wildlife safaris	
Sightseeing	
Whale tours	
Other: Specify	

32. How would you classify your typical customer/ client?

Gender	**Age**
	( )Younger adults: under 25
( )Female	( )Young: 25-34
( )Male	( )Middle age: 35-49
( )Both	( )Older: 50-64
	( )Retired: 65+

33. Which source market/s do you get most of your business from? State approximate annual percentage.

Market	Approximate %/year
Domestic	
African (excluding domestic)	
Europe	
Asia & Australasia	
North America	
South America	
Other: Specify	

34. What are the busiest seasons for your business?
35. List the top 5 most popular Cape Town destinations for your clients?

1.	4.
2.	5.
3.	

36. Your clients mostly travel
( ) alone
( ) in pairs/couples
( ) in small groups: less than ten people
( ) big groups: more than ten people
37. List 5 main challenges for your business.
38. List 5 of what you consider high priority development issues that should be implemented to ensure industry growth?
39. In the next 3-5years your business is likely to:
( ) Grow substantially
( ) Grow modestly
( ) Remain the same
( ) Decline
( ) Don't know

Additional information

40. In-order for us to conduct trend analysis we will need more performance data for over a period of time Which of the following will you be able to provide?
( ) Tour bookings figures
( ) Tour sales figures
( ) Other: please specify

Thank you very much for your participation