



The Future of Backpacking

A scenario planning approach to the
backpacker's travel behaviour



Stenden



The Future of Backpacking

This research is accomplished by Ferda van Vaals, intern at the European Tourism Futures Institute.

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More information:

European Tourism Futures Institute

(+31) 58 244 192

E-mail: info@etfi.eu

Website: www.etfi.eu

FOREWORD

The world is changing. In fact, the world changes more rapidly than ever before. The tourism industry is one of the most dynamic industries. You have probably read a couple of times about ‘flashpacker’, although definitions would have been vague and the article was presumably a bit superficial. Some changes in backpacker travel behavior are identified in journals, magazines and blog articles and the modern term flashpacker has been introduced recently. Though not much academic research has been executed on how this changes will further develop and what the tourism industry strategically can implement in order to manage this highly potential market successfully.

By use of a literature review and an environmental scan four plausible future scenarios will be created, based on the research question: **How could the future of backpack tourism look like in 2030, and how could tourism businesses anticipate on the changing demand.** The scenarios, which allow one to ‘think out of the box’, will eventually be translated into recommendations towards the tourism sector and therefore can create a future proof company strategy. The tourism sector is highly influenced by external factors and can be strengthened or threaded by uncertainties. Surprisingly, tourism businesses tend to focus on short-term strategies rather than on long-term strategies. Anticipating on future scenarios can significantly strengthen one’s current and future market position.

Changes in backpacker travel behavior are mainly be driven by a higher budget during the trip, more technological tools to be taken with them, and a higher demand for comfort and luxury. Communication and multimedia tools may protect travelers from feeling homesick, and at the same time engage friends and relatives to virtually join the trip. GPS systems and mobile applications can simplify one’s itinerary and may prevent the backpacker from actually getting in contact with the local host community. If backpacking is getting this easy, the step of actually go for backpacking will become smaller resulting in backpacking being not unique anymore. Are travel motivations changing? Do the new flashpackers just want to travel so that they can share their experiences to the rest of the world? But where in the world to explore new places in 2030?

This research publication presents four plausible future scenarios followed by recommendations for today’s tourism industry.

Ferda van Vaals

Intern at the European Tourism Futures Institute

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Backpacking vs. Flashpacking

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By: Ferda van Vaals, student BBA International Tourism Management
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www.etfi.eu / info@etfi.eu

1. INTRODUCTION

The world is changing rapidly, due to influencing factors such as the continuous increase of fuel prices, the importance of social media, and the speed of new technologies. Not surprisingly, the most stable factor at the moment is ‘change’. The tourism industry is not only the biggest growing sector in the world; it is also the most unstable one. Cottrell sees the tourism sector as “highly sensitive to economic recession on the demand side, to political tension in destination areas, and to consumer taste” (2001: 36). Although the industry is surrounded by numerous uncertainties, tourism companies focus rather on a short-term strategy (ANVR, 2012) while anticipating on possible future scenarios can significantly strengthen their current and future market position.

THE TRANSITION FROM BACKPACKING TO FLASHPACKING

Numerous factors lead to change in the field of tourism. The supply side of the tourism is influenced by these factors as well as tourist travel behavior. This report is based on the tourism market ‘backpackers’. Despite the fact that backpackers occupy an (increasing) important position within the tourism industry (Sørensen, 1999), backpacking does not get much academic attention. The backpacker market changes and backpackers seem to make a typology movement towards “flashpackers”, the latest mainly driven by tourists becoming more wealthy and making more use of technological tools. The old-fashioned backpacker, a budget ‘light traveler’ with a backpack travelling to all places of the world, changes into an adventurer who completely relies on the World Wide Web and its technological progress. The development of demand will be researched, and this will be related to today’s supply: the tourism industry. Not surprisingly, supply has to anticipate changing demand.

The question is whether the backpack market will be able to maintain its traditionalism, since many travelers let themselves lead by (technological) developments. Is the nature of backpacking changing and will it never return to like it traditionally was, or is flashpacking just a current hype within the backpack scene?

RESEARCH RATIONALE

The neologism ‘flashpacker’ has been introduced a couple of years ago by journalists, magazine editors and bloggers. The media and many web sites discuss about the flashpacker phenomenon across the world (Hannam and Diekmann, 2010). Though neither on this development nor on its implications for the tourism sector, academic research has been executed. Newspapers, magazines and forums are publishing articles about the flashpack trend and it is getting more known, however not much academic and valid research exist so far. Specifically tourism businesses might benefit from gaining more knowledge about the current changes and can enable themselves to anticipate on the changes in demand. Tourism businesses start to approach product development in a consumer-focused way -also called post-Fordist- instead of a product-led –named Fordist- manner, enabling them to respond to consumer needs and wishes (Page and Connell, 2009). Many tourism businesses such as tour operators, travel agencies and accommodation providers get to deal with flashpackers however it is questioned whether these involved parties do know how to innovate based on the developments in their market. Ateljevic and Doorne claim that the changes in the backpack culture confirm “a continuing need for market research that reveals even more heterogeneity” (2004: 76). “In 2030, tourism will be here but the tourists will be different.” (Yeoman, 2008: 32).

The substantial changes in the backpack market create an opportunity for businesses that prepare for possible changes. According to Talwar (2010: 239, In: Conrady and Buck, 2010): “The new reality is that we must prepare for perhaps a decade of

environmental turbulence and accept that uncertainty is now the new central planning assumption.” The comprehensive research technique scenario planning where realistic future scenarios are drawn based on external factors is an appropriate research method for this case since the method is multidisciplinary, comprehensive, and it encourages one to think ‘out of the box’. It is a planning and innovation tool for the tourism industry. The goals of this research were to construct a literature review, to make qualitative scenarios, and to recommend the tourism sector. The ultimate aim of the research was to provide conclusions and recommendations to tour operators, backpack intermediaries and travel agencies.

In order to meet the goals of this research, a problem statement and research questions have been formulated. The following problem statement serves as the core question of the research:

How could the future of backpack tourism look like in 2030, and how could tourism businesses anticipate changing demand?

As the research is based on the research method scenario planning, the research questions are formulated by the steps of the method. On the one hand an analysis of the demand is important. By discussing the market profile and external factors, developments in backpackers’ travel behavior can be identified. It is mainly important to be able as tour operator or backpacker intermediary to anticipate on changing consumer behavior in order to keep customer relations and to maintain or obtain market position. Demand and supply are continuously related to each other.

1. What are the drivers for change of (backpack) tourism?
2. What are the most important and uncertain drivers with regard to backpackers and what scenarios can be defined for the future of backpack tourism?
3. What are the characteristics and implications of the 2030 Backpack scenarios?

Research question 1 and 2 belong to the scenario creation process and are related to the demand side, whereupon research question 3 discusses implications of the created scenarios and therefore relate to tourism supply. The demand and its changes are researched by use of literature review, expert interviews, and a focus group workshop. The supply side aspect, including how to anticipate, is based on expert interviews too. So all in all, the report is based on qualitative research.

2. LITERATURE REVIEW

This chapter consists of a short demand-supply analysis since the changing customer behavior and the reaction of the tourism industry is all about the demand/supply relationship. The next part consists of a specification of the notions back- and flashpacking, and literature about the transition from back- to flashpacking.

THE CONNECTIVITY BETWEEN DEMAND AND SUPPLY IN TOURISM

Demand together with supply drive tourism development. “Failing to understand supply and demand will make it difficult to anticipate and manage supply shortages and may increase the negative impact of a reduction in demand.” (New South Wales Government, 2012: §1).

Demand

In former times tourists were seen as a homogeneous demand (Zhang, 2005). Nowadays the importance of adapting planning and marketing strategies to specific market segments has been recognized (Gunn and Var, 2002). Market segmentation is important in order to offer the right product for the right person at the right time.

Tourism demand is highly dynamic. A financial crisis, for example, unconditionally changes consumer behavior. Both independent and dependent demand can be influenced (New South Wales Government, 2012); when the demand for a primary product reduces, the demand for secondary products (dependent demand) will reduce as well. The demand is impacted by actions from the supply side as well as by external factors.

Supply

Jafari (1982) states the tourism supply comprises accommodations, food service, transportation, travel agencies, recreation and entertainment. Although many subdivisions can be made, it could be stated that the supply side of tourism should be one big interrelated system.

Similarly to tourism demand, tourism products are also heterogeneous leading to unique travel experiences in different holiday destinations (Zhang, 2005). According to Gunn and Var (2002), the supply side can be influenced by many external factors such as a supplier being not able to serve its products due to an emergency, or new suppliers entering the market. Factors such as labor (trained workers), entrepreneurship, the attitude of community, (high) competition, political issues, natural and cultural resources, and finances generally greatly influence tourism supply (Gunn and Var, 2002). These factors continue to have a greater impact on supply since supply chains are globalizing (New South Wales Government, 2012). When new supply opens, demand will be “redirected (‘displacement effects’) from similar products/services in the same area, attract demand from other activities and it thirdly generates new demand” (Cooper et al., 2008: 34).

Finding a balance between demand and supply is a dynamic process as the continuing change through external factors does not stop. Usually when the price of a product or services increases, demand decreases, which is translatable to a price elasticity

(of supply) formula. Tourism demand generally strongly reacts on price changes so therefore tourism products are generally associated with a price elastic demand curve (NEVI, 2012). Therefore it can be stated that changes in economy directly influence tourism demand (Page and Connell, 2009). Reasons for the price elasticity of tourism stated by Cooper et al. (2008) are the high ratio of tourism prices to income and the choice of customers to forgo or go for a substitute. Customers are constantly searching for the best deals, and online services help them in finding the best or cheapest package (FutureFoundation, 2012c). Tourism products also have positive income elasticity, so when disposable income increases, the demand to tourism products as luxurious goods increases as well. High unemployment logically leads to less tourism flow. It should be noted that a decrease in price or an increase in disposable income does not automatically lead to more traveling for everyone; leisure time and interest play an important role as well. Due to price elasticity and many external factors, the demand in tourism is highly dynamic.

In this report, especially the demand side of backpacking in terms of customer behavior is researched. It can be concluded that the tourism demand is recognized as highly heterogeneous. The recommendations provided in this report are meant for backpacker intermediary agencies, tour operators and travel agencies. Furthermore, recreational facilities, transport facilities, hotels, technological services companies, visitor bureaus and educational institutes could benefit.

AM I A BACKPACKER?

In order to get an understanding of what kind of traveler the backpacker is and, how a backpacker’s trip looks like and what a backpacker drives to go on extended holidays, the next part gives a literature review on the backpacking in general.

The backpacker profile

Hannam and Ateljevic define backpacking as following: “travelling independently for several months and only staying in budget accommodations” (2008: 11). Backpackers are generally young budget tourists and their trip is often seen as an extended holiday (Loker-Murphy and Pearce, 1995; in Cohen, 2011). Backpackers are budget travelers of who the trip is generally longer than the average, additionally they do not take a lot of luggage with them and this type of tourist has adventurous and cultural purposes. The biggest group of backpackers is aged between 25 and 35 years old. Many of them are students, forming a significant segment with 26-36% of all backpackers in 2003 (Richards and Wilson, 2004), and they travel frequently. The ‘youth’ segment is hard to define nowadays since the “middle age” shifts through increased longevity and perceived age is seen as more important than chronological age. Many traditional backpackers who traveled in the 1960s and 1970s continued to backpack resulting in a bigger age range in backpacking today, including even 60+ backpackers (Mintel, 2003).

Most of the backpackers are from Western origin (West Europe, North America, Australia and New Zealand) (Sørensen, 1999). Generally backpackers have a relative high level of education, and their trip is often seen as a suspension from normal life; after graduation, marrying/divorcing, before changing jobs or before settling down (Sørensen, 1999). Maoz and Bekerman (2010) clarify that backpackers are in a transitional life phase, such as a ‘gap year’. Backpackers have a clear reasonably ethical tourism ideology, in some cases even anti-tourism ideologies, as their travel behavior is more culture and authenticity oriented than in case of the ‘sunlust’ of mass tourists. Welk points out five elements of the backpacker ideology: travel on low budget; meet different people; to be free, independent and

Both tourism demand and supply are highly heterogeneous, leading to unique travel experiences at different destinations.

The backpacker ideology:

- travel on low budget;
- meet different people;
- be free;
- be independent and open-minded;
- travel as long as possible.

open-minded; to organize his journey individually and independently; and to travel as long as possible” (2004: 77). Backpackers are flexible and independent by nature, arranging their route by themselves instead of booking the trip by a travel agency or tour operator and they generally are able to get in touch with local people. Thus they are self-organized and generally looking for multiple destination (Sørensen, 1999), so one route with several destinations instead of one destination.

Trip characteristics and travel behavior of the backpacker

Most trips have an average length of sixty days although the length naturally this depends on the backpackers’ occupation, income, and travel style (Richards and Wilson, 2004). It can be stated that backpackers’ trips are generally longer than the overall average, since European outbound tourism had an average length of stay of 9.2 nights in 2007-2009 (Conrady and Buck, 2010).

Backpackers generally make use of budget accommodations (70% of the backpackers), whereas only 19% of the travelers use it and just 8% of the tourists. The budget accommodations used mainly consist of hostels, guest houses and homes of friends and relatives, although hotels, bed & breakfasts, and campervans are also made use of (ATLAS Backpacker Research Group, 2002, in: Richards and Wilson, 2004).

Backpackers undertake a broader variety of activities than average travelers as they want to meet their travel motivations (described in a later section). Their activities are fairly similar to the ones undertaken by tourists in general, such as cultural sightseeing’s (84,5%), walking (86,5%) and sitting down in cafes (68,4%), with some more specific backpack activities such as observing wildlife and nature (64,9%), doing passive activities such as hanging out (63,8%), and even doing extreme sports (33,2%). Also nightclubs are visited (58,7%) as well as shops (Richards and Wilson, 2004).

Information is gathered beforehand via the Internet, via other people, guide books, travel agencies, previous experience, newspapers/magazines, tour operators, brochures, TV/radio and via airlines. Information is also gathered during the trip via accommodation providers and other backpackers. Compared to other tourists (9% in 2009 (Conrady and Buck, 2010)), the rate of backpackers using guidebooks is high. Seventy per cent of the backpackers used guidebooks in 2002, where Lonely Planet is the most popular one (Richards and Wilson, 2004). Nearly no backpacker books the accommodation in advance, let alone a complete travel package.

In 2002, the average daily expenditure of backpackers was around €15. Europeans in general spent €95 per night during their trip (2007-2009).

The average spending of Europeans traveling to international destinations was €95 per night in the period 2007-2009 (Conrady and Buck, 2010). Compared to this, the average spending of the backpackers is relatively low, especially with experienced backpackers. In 2002, the average daily spend was around €15 (Richards and Wilson, 2004). Proportionately it should be noted here that the average length of stay of the backpacker is significantly longer.

On the question whether backpackers are ethical tourists or not, Hannam and Ateljevic (2008) explain that backpackers do not fully conform to their self-created ethical tourist behavior model, although this does not automatically label them as unethical. Also under this context great differences exist, with some backpackers being close to the ethical model and some being not. Out of a survey conducted by these authors appeared that many backpackers would behave more ethically if tourism providers would do so as well. Nevertheless backpackers are more ethical than the average tourist, adopting a tourism ideology of struggling against the growth of tourism in order to preserve traditional lifestyles (Richards and Wilson, 2004).

Travel destinations

Concerning destinations, South-East Asia, Australia, New Zealand and South America were the main backpacker destinations in 2002. Bangkok and Sydney were seen as backpacker centers, with an eye on Vietnam as the ‘new’ backpack destination. The countries most visited are Vietnam, Thailand, India, New Zealand, Australia, Turkey, France, the United Kingdom, Canada and the USA (Richards and Wilson, 2004). A constant drive to (re-)explore places leads to new backpack destinations.

With an eye on the spatial pattern theory of Lue, Crompton and Fesenmaier (1993), backpackers use four travel patterns: the ‘en route pattern’, the ‘base camp pattern’, the ‘regional tour pattern’ and the ‘trip chaining pattern’. Recognizing these travel pattern is relevant for identifying a regional planning approach (Gunn, 1994). The ‘en route’ travel pattern has one final destination but several stop-over’s for getting there. The ‘base camp pattern’ has one main destinations, but several stops in destinations surrounded. Contrary to this main destination based patterns, the ‘regional tour pattern’ has the entire tour as destination and might adopt a thematic character. The ‘trip chaining pattern’ has the same multi-destination structure, however this trip consists of primary and secondary destinations and is not necessarily thematic.

Backpackers travel to ‘enclaves’, a bounded area positioned within the boundaries of another, also called ‘tourism bubble’. A destination or district becomes an enclave when there exist relative uniformity and when it is a homogeneous tourist space (Edensor, 1998). Westerhausen (2002) sees an enclave as a cultural home away from home, containing a temporary social network. Hottola (2005) approaches enclaves as ‘safe havens’ and ‘metaworlds’ where tourists may get control over their condition whether it is actual or perceived. The backpacker enclave can be found everywhere around the world, whether it is in a crowded city centre or in quiet rural areas with low accessibility, and they can be long-termed or temporary. The backpacker enclave reverberates an institutionalization of the backpacking scene, forming an alliance because of their shared aversion to mass tourism (Cohen, 2011). According to Cooper (2008), a tourist destination often goes through four steps. Firstly a few travelers discover an area; secondly facilities are built up in order to receive these and more travelers. Next, the public sector gets involved and improves accessibility and infrastructure, and fourthly mass tourism or institutionalized tourism might develop. Backpackers are pulled by destinations mainly in the first two phases, and some of them in the third.

Backpackers gather in travel enclaves: ‘a cultural home away from home’, ‘a temporary social network’ or ‘a metaworld’/‘tourism bubble’.

Backpacker motivations

Backpackers are independent travelers and have a high adaptation level and a low (but increasing) volume growth. As they are drifters, they want to roam internationally and want to interact and merge with the host community. Backpackers are driven by allocentric motives, meaning that they are looking for a place different than their home environment. Self-actualization and experiencing new things in most cases play a role in backpackers’ travel motivation.

Several authors agree on backpackers’ motivations being ‘exploring other cultures’, experiencing excitement’ and ‘increasing knowledge’ (Richards and Wilson, 2004), and ‘escaping from the daily life’ added by Hannam and Ateljevic (2008). Richard and Wilson (2004) endorse this by mentioning ‘being motivated to explore culture’ and ‘searching for knowledge and excitement’ as most important travel motives for backpackers. Therefore it can be said that cultural and interpersonal motivators are dominating here.

Where mass tourists are motivated by ‘sunlust’ are backpackers motivated by ‘wanderlust’.

According to the distinction between the motivators ‘sunlust’ (search for a better environment than at home) and ‘wanderlust’ (curiosity to experience new and unfamiliar surroundings) of Cooper et al. (2008), backpackers are motivated by ‘wanderlust’. Backpacking is seen as a ‘lifestyle’, with backpackers having their own social identity. ‘Lifestyle’ travel is associated with sustained physical mobility (Cohen, 2011).

A summary of ‘the backpacker’ is processed in table 1.

Backpacker profile	<ul style="list-style-type: none">- Aged 25-35 years- Many students (26-36% of all backpackers in 2003)- From West Europe, North America, Australia, New Zealand- Travel to Southeast-Asia, Australia and South-America- Relatively high level of education- Trip as a suspension from normal life- Ideology (anti mass tourism)- Cultural- Adventurous- Flexible- Independent (self organizing)- Naturally get in touch with locals- Looking for multipledestination
Travel motivation	Cultural and interpersonal motivators: <ul style="list-style-type: none">- ‘exploring other cultures’- experiencing excitement’ and ‘increasing knowledge’- ‘escaping from the daily life’.
Destinations	‘Off the beaten’ tracks: <ul style="list-style-type: none">- South-East Asia, Australia, New Zealand and South America (2002)- Backpacker <i>centers</i>: Bangkok and Sydney (, Vietnam)- Countries: Vietnam, Thailand, India, New Zealand, Australia, Turkey, France, the United Kingdom, Canada and the USA (2004). There is a constant drive to explore new destinations
Budget-minded	<ul style="list-style-type: none">- Low expenditure: €15 per night- Budget accommodations like hostels- Low-cost carriers
Other trip characteristics	<ul style="list-style-type: none">- Long trips (average of 60 days)- Little luggage- Activities: general tourism activities’with additional specific by backpacker executed activities ‘wildlife and nature watching’, ‘hanging around’, ‘doing extreme sports’ and ‘partying’.
Information gathering	<ul style="list-style-type: none">- via a variety of channels, remarkable use of travel guides (Lonely Planet) because they all do, and they want to meet one another.

Table 1: Backpacker summary

OR AM I A FLASHPACKER...?!

The ‘old-fashioned’ backpacker characterized by a traveler with a practical backpack totally isolated from the home environment changes in an adventurer who completely relies on the World Wide Web with its own laptop, smartphone, camera, and other equipment...

The flashpacker on the move

Backpack conditions in general have improved during the last decade. Old equipment makes place for better shelters, high quality sleeping bags and practical cookware: all lighter, more qualitative and smaller (NomadicMatt, 2010). Technological tools enable backpackers to be guided by electronics. Next to the development on technological tools, general demographic trends influence backpacking such as an average older age at marriage; an average older age when having children; and more holiday and leisure time (Hannam and Diekmann, 2010). These trends partly generated from a general higher wealth and deviating travel characteristics (‘upscaled travel’) lead to the new termed style of backpacking: ‘flashpacking’. The ‘flashpacker’ is known now as a new and main elector of travel nowadays and express the changing demographics in society and developments in technology (Hannam and Diekmann, 2010).

‘Flash’ refers to ‘style’, and flashpacking can be defined as traveling in style (Hannam and Diekmann, 2010). The online dictionary defines a ‘flashpacker’ as “a backpacker who has a considerable higher disposable income” (Dictionary.com, 2012). ‘Upscaled travel’ and ‘Business-class backpacking’ are also mentioned randomly to define flashpacking.

Flashpacking is also defined as ‘upscaled travel’, ‘business-class backpacking’, ‘backpacking with bucks and toys’ and ‘techno-traveling’.

Travelblogs.com (2009) adds to this that it can even be defined as ‘backpacking with bucks and toys’, since technological tools are a big part of flashpackers their luggage, and also ‘techno-traveling’ was mentioned (Flashpacker.com, 2012). In short flashpackers have a larger travel budget but less time. Swart (2006) state that most flashpackers were backpackers before, but they want more comfort and privacy by now, although they still hang around with backpackers.

Hyper-mobility, the career break phenomenon, and the overall modern work-life balance all contribute to the flashpack evolution (Hannam and Diekmann, 2010).

The neologism flashpacker is a change in the nature of backpacking and it attracts a new market, where backpackers spend more money now whether it is on accommodation, excursions, or on food and beverages (Reishonger, 2010). According to Hannam and Diekmann, the flashpacker is “largely unexplored and an emerging sub-segment of backpacking” (2010: 23).

The flashpacker profile

Hannam and Diekmann (2010) place flashpackers in the age category of 25 till 40 years old (usually 30+). They go along and engage with the mainstream backpack culture (Hannam and Diekmann), and originate primarily from the UK, Scandinavia, Australia, the USA, Canada, Germany and Ireland (Hannam and Diekmann, 2010). They share the need for flexibility and independency. Similarly to backpackers, flashpackers are adventurous and they prefer to move on ‘grassroots-level’, meaning that making contact with local people is one of the main goals next to avoiding mass tourism (Reishonger, 2010). Combining different travel styles is getting more popular.

This ‘new’ type of backpackers bring on their journey with them an expensive backpack or a trolley-like case, typically bringing along their laptop/netbook, a ‘USB flashdrive’, a high-quality camera, and a smart phone. Additional to Google Streetview and hotel reviews on the Internet new electronic resources have been introduced such as mobile applications (apps) and communication systems like Skype (Metro, 2012) used by these ‘techno-travelers’. Flashpackers share the need for showing their experience to the

rest of the world, by blogging and broadcasting high quality photos and videos. Where backpackers were highly concerned about the safety of their equipment a couple of years ago, travelers are less worried now (NomadicMatt, 2010). All equipment needed to publish photos and videos online as well as communication tools will be brought with them, resulting in the distance between the traveler and his home environment becoming virtually and emotionally smaller. Flashpackers travel in similar ways as backpackers and use the same traveler infrastructure; although Hannam and Diekmann (2010) state that they label themselves rather as ‘independent traveler’ than as ‘backpacker’. Main travel motivations are ‘taking an extended break from normal life’, ‘meeting other travelers’ and ‘experiencing a place/culture/local community’ (Hannam and Diekmann, 2010). Next to the fact that holidays are higher valued and people are willing to put more money aside for traveling, the world gross domestic product (GDP) rises. Oxford Forecasting (2006) expects the GDP to be risen to 129% in 2030. As mentioned before, a flashpacker “pays in money rather than in time” (NomadicMatt, 2010: 38). A flashpacker prefers the quickest and most comfortable mode of transport, and requires a comfortable accommodation (The Sydney Morning Herald, 2006). As a result of the higher spending of the flashpacking compared to the traditional backpacker, services and facilities showed up in order to help people spend their ‘extra’ money. Consequently this new flashpacker undertakes more organized activities such as sightseeing tours.

Accommodation and activities of the flashpacker

Flashpackers stay not solely in budget accommodations but in a variety of accommodations due to their higher travel budget and increased demand for comfort. The number of purpose-built luxurious backpacker accommodations (‘flashpacker establishments’) is increasing (Pursall, 2005). But what are ‘flashpacker establishments’? Hannam and Diekmann (2010) describe a flashpacker establishment as a clean accommodation with hotel-standard facilities, comfy beds, bars and swimming pools, offered for backpacker prices. Locations often visited by flashpackers are similarly to backpackers ‘off the beaten’ places.

Concerning activities, the activities of the modern flashpacker does not significantly differ from the ‘traditional backpacker’, although the wish for comfort and the limitation of time may lead to flashpackers making use of organized excursions. Both back- and flashpacker prefer informal and participatory activities (Hannam and Diekmann, 2010).

The virtual world of the flashpacker

The increase of virtualization in tourism is seen as the biggest and most rapid driver of change in tourism. “A new type of mobile traveler can exist now that could not 20 years ago.” (Hannam and Diekmann, 2010: 43). Hannam and Diekmann (2010) identify three spaces of back/flashpacking (Figure 1). This chapter provides information about the virtual space in tourism, consisting of email, online communities, blogs, personal websites, mobile devices such as smartphones and laptops, and Internet connection.

“A new type of mobile traveler can exist now that could not 20 years ago.”

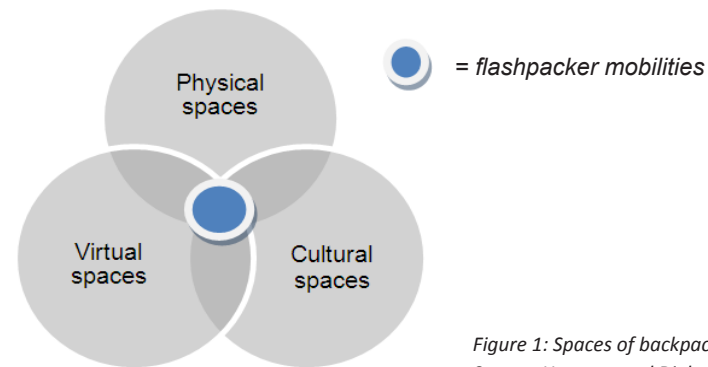


Figure 1: Spaces of backpacking
Source: Hannam and Diekmann, 2010

Before the actual trip, backpackers make mainly use of the internet to search for information. Backpacker forums as Lonely Planet Thorn Tree Forums or other virtual communities are consulted beforehand. Online information from friends, family and fellow travelers is also collected before leaving home (Hannam and Diekmann, 2010). Surprisingly, gathering information via online communities is mostly done by flashpackers in the age category 41+; however this age group is obviously less interested in joining a social networking site (Hannam and Diekmann, 2010). Around eighty per cent of people from developed countries gather holiday information beforehand via the Internet (FutureFoundation, 2012a). Numerous social networks are used by flashpackers, resulting in a close virtual proximity and so a reduction in the distance between home and away (Hannam and Diekmann, 2010). Constantly contacting friends and family back home and other travelers has become the norm, and social-, home-, and work life is patterned by networks now. The technology advances extend personal identity and enables travelers to get connected to their virtual network wherever they are and whenever they want. Innovative social computing systems enable travelers to find like-minded travelers and to communicate directly with them.

Gathering information from the Internet is mostly done by the 41+ flashpackers.

Also the use of e-commerce by travel organizations has grown significantly (Hannam and Diekmann, 2010). "Flashpackers support the rise of virtual mobility as they have fully adapted to the new tools." (2010: 43). Currently we live in an always-online society: many of us are continuously connected to the rest of the world. Mobile devices have become complete media centers (Cultruurmedia, 2012). Also accommodations responded en masse on flashpackers having the need to be globally mobile by providing wireless connection.

Hannam and Diekmann listed the following during-trip technology-related activities or statements, ranked on popularity:

- Use email to stay in contact with friends and relatives back home
- While traveling, your email address and/or social networking profile is your only real address
- Prefer to stay at hostels with free internet or wi-fi access
- Added friends met during your trip on Facebook, Myspace, Bebo, etc.
- Made future travel bookings online
- Keep a journal
- Use social networking site to stay in contact with friends and family back at home
- Changed travel plans during your trip after finding information online
- Send postcards or letters, use calling cards, or call centers to stay in contact with friends and family back home
- Used online backpacker forum to find information for the rest of the trip
- Posted pictures online during trip
- Made a post to online forum hostel review site to share experiences
- Used a cell phone while traveling to stay in contact with home environment
- Maintain an online blog for friends, family and other backpackers to read about your trip
- Used a cell phone to stay in contact with fellow travelers, or to contact accommodations, attractions, airlines etc.
- Stay in contact with work while traveling using email, cell phone etc.

Again, the 41+ age group makes significant less use of social networks/media. 73% of Dutch travelers think it is fun to post holiday photos on the Internet (FutureFoundation, 2012d). This group posts fewer pictures, but makes more use of web reviews for accommodations. The other age groups (18-24, 25-30, 31-40) generally show only slight differences in their technology use. Especially database-, communication- and tracking systems have a considerable impact on the development of (backpack) tourism. Items most brought during the trip were in 2008 (in the order of usage) a digital camera, an iPod or other Mp3 player, a cell phone, a laptop/netbooks and a video camera (Hannam and Diekmann, 2010). In 2012, fifteen per cent of the British young travelers (25-34

In 2012, 15% of the British travelers between 25 and 34 years old used a travel app at least once a month.

years old) used at least once a month a travel app (FutureFoundation, 2012a). Apps used most are EcoCarrier, Skyscanner's, Appi Holidays, FlightAware, Nokia Heat Maps, TravelSIM and the Delta Airlines baggage/tracking app (FutureFoundation, 2012a). Half of the Dutch iPad owners state to use their iPads often while traveling, forty per cent uses the iPad sometimes while traveling, and ten per cent does not use it during their trip (FutureFoundation, 2012a). As the new generation backpackers do not have much leisure time, even mobile apps are created

helping to coordinate one's daily activities (FutureFoundation, 2012d).

Virtual reality (VR) can make travelers experience parts of their journey through equipment, before their actual holiday experience or during their holiday decision-making process. The VR simulation, which can also function as an education or entertainment tool, is already used by tour operators and destination marketing organizations (Yongho, Hyun, Lee and Hu, 2008). Augmented reality (AR) is a tool which can combine real views with projected virtual elements by use of a head-mounted screen or a head-up display, and according to Kalawsky, Stedmon, Hill and Cook (2000) it is a graphical overlay which betters the interaction between the user and the real world. Backpackers as cultural and natural travelers will be interested because they will be enabled to see projected digital views. Moreover AR can facilitate in restaurants, bars, hotels and shop, to display menus or discounts via mobile screens.

Shortly in can be stated that flashpacking is a result of external factors influencing the traditional backpacking. Flashpacking is the new 'upscaled' and more comfortable backpacking, where the adventurous flashpacker is accompanied with a variety of technological tools. Flashpackers want to have a story to be told once they got back home (Jet2.com, 2012). Additionally, The Sydney Morning Herald state that they "won't just climb a mountain, they'll paraglide of it" (2006: \$4).

"Flashpackers won't climb a mountain, they'll paraglide of it".

BACKPACKING VS. FLASHPACKING

At first it should be noted that backpacking and flashpacking are not contraries, in fact they one can label himself as both. However, the difference is made clear in order to clarify changes, whether this is on an existing market (backpackers) or a completely new market.

It is proved hard to overlook 'travel career patterns' in order to comprehend backpack developments over a period of time, since backpacking as a lifestyle type of travel is not akin to career with an ongoing physical mobility (Cohen, 2011). However definite changes in the backpack market are identifiable. Both backpackers and flashpackers can be defined as follows:

"Independent budget adventurer traveling for one to several months to off the beaten destinations with minimum baggage"

"Demanding time-conscious adventurer traveling for one to several months to off the beaten destinations taking with them (a scope of) technological tools"

Many characteristics of flashpackers are similar to the ones of backpackers, such as flashpackers traveling for a longer holiday for a career break or a break from normal life (Hannam and Diekmann, 2010). Moreover they are both aged in their (mid) twenties and older. They share the choice to travel small scaled and their orientation on value for money. Furthermore both markets want to meet other travelers as well as locals, and significantly share the emphasis on being self organized and having a flexible itinerary.

Whether flashpacking is a major change of the last couple of years continuing to grow over the next decade is uncertain according to Machielse (cited in Reishonger, 2010), stating that the flashpacker trend might be a matter of age, since once recently graduated or studying backpackers get older, they have more purchasing power and consequently change into a flashpacker (2010). At the backpacker forum of Lonely Planet (Lonely Planet Travel Forum, 2012), a discussion was going where one doubted whether flashpacking is totally new, or just a new term for an already existing tourism market. Presumably the flashpack market consists of backpackers who have turned into flashpackers as well as a new market as the new 'flashpack' conditions has lowered the ultimate decision to actually do "backpacking". After all the communication tools and the virtual world make the traveler feeling not totally isolated. As the step to actually go exploring the world, whether you call it back- or flashpacking, is getting smaller, this travel segment tends to grow significantly. Additional, the mobility of youth is rising (Hannam and Diekmann, 2010). How exclusive will it be in five years to be a back(/flash)packer? Where to find exclusive backpack enclaves? And if this new flashpacker requires comfort and easiness and additionally has less time to travel, shouldn't this lead to the backpack market getting closer to the mass market? The level of melting together depends partly on the respond of backpack destinations to the changing consumer behavior: if they actively start providing services and facilities in order to create comfort and time-saving, flashpack activities might become organized excursions, for example. Suzanne Holiday, account manager at Saltmarsh Partnership, one of the UK's leading travel and tourism PR agencies is aware of the transition and states that:

"The travel industry is quickly recognizing the importance of the growing flashpacker market. They are more lucrative consumers than the traditional backpacker. Trendy up-market hostels are introduced with private rooms and women-only floors. This market also spends more on value add-ons such as day tours" (In: Jet2.com, 2012: \$5).

To conclude, an overview of similarities and differences is created by means of table 2.

Similarities	<ul style="list-style-type: none">- Many students (26-36% of all backpackers in 2003)- From West Europe, North America, Australia, New Zealand- Travel to Southeast-Asia, Australia and South-America- Relatively high level of education- Cultural- Adventurous- Flexible- Independent (self organizing)- Looking for multiple destination <p>Cultural and interpersonal motivators:</p> <ul style="list-style-type: none">- exploring other cultures- experiencing excitement and increasing knowledge- escaping from the daily life
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Similarities	<p>Off the beaten' tracks:</p> <ul style="list-style-type: none">- South-East Asia, Australia, New Zealand and South America (2002)- Backpacker centers: Bangkok and Sydney (, Vietnam)- Countries: Vietnam, Thailand, India, New Zealand, Australia, Turkey, France, the United Kingdom, Canada and the USA (2004). Drive to explore new destinations.- Little luggage, practical packed, but different stuff- Use of the same traveler infrastructure- Many students (26-36% of all backpackers in 2003)- From West Europe, North America, Australia, New Zealand- Travel to Southeast-Asia, Australia and South-America- Relatively high level of education- Cultural- Adventurous- Flexible- Independent (self organizing)- Looking for multipledestination <p>Cultural and interpersonal motivators:</p> <ul style="list-style-type: none">- 'exploring other cultures'- experiencing excitement' and 'increasing knowledge'- 'escaping from the daily life'. <p>Off the beaten' tracks:</p> <ul style="list-style-type: none">- South-East Asia, Australia, New Zealand and South America (2002)- Backpacker centers: Bangkok and Sydney (, Vietnam)- Countries: Vietnam, Thailand, India, New Zealand, Australia, Turkey, France, the United Kingdom, Canada and the USA (2004). Drive to explore new destinations- Little luggage, practical packed, but different stuff- Use of the same traveler infrastructure
Differences	<ul style="list-style-type: none">- Age: backpackers are 25-35 years old, flashpackers 25-40 (most 30+)- May be less easily get in touch with locals due to desolation with electronic tools- Higher budget- Variety in accommodation classifications and types of accommodations- Slightly shorter trip (less time)- More organized activities (excursions) as it saves time and helps flashpackers spending their 'extra' money

Table 2: Backpacking vs. Flashpacking; similarities and differencestools

Flashpackers are apparently higher yielding backpackers. The tourism industry reacts on the flashpack evolution by promoting career breaks and discussing travel options (Hannam and Diekmann, 2010), such as www.thecareerbreaksite.com.

3. RESEARCH METHODOLOGY

How could the future of backpack tourism look like in 2030, and how could tourism businesses anticipate changing demand? That question plays a central role in this research. The next sub parts were formulated based on scenario planning:

1. Drivers for change of (backpack) tourism

2. The most important and uncertain drivers and the scenarios created

3. Characteristics and implications of the 2030 Backpack scenarios

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}

}

demand

supply
- The European Tourism Futures Institute has several academic researchers with their own field of expertise, for example demographics or technology. Scenario planning is used as the main tool by the ETFI to paint realistic future scenarios in order to help organizations with their vision and strategy decision making processes.
- At first, **desk research** has been done in order to construct the literature review where existing theory is identified, summarized and evaluated. Characteristics of the traditional backpacker have been listed and the backpacker was defined (1). Next theory about the modern flashpacker and the reasons for the market change is collected and reported (2).
- Scenario planning** is used as the main research method in order to meet the goal of implementing a future perspective. According to Nekkers (2006), people tend to assume all social developments are absolute trends, thus no possible trend deviations are taken into account. However since the world is changing rapidly and factors appear to be uncertain, the importance of identifying these trend deviations and the speed of change has been validated. Uncertainties are external factors that make the future unpredictable and these become critical uncertainties when they could develop quite the reverse (Nekkers, 2006). 'Critical' in this context means that one situation could turn into one another. Critical uncertainties can develop in two opposite directions. Some may find it hard to deal with uncertainties, as they associate uncertainty with a lack of guidance of life or societal developments. However, uncertainties occur continuously and unpredictability is rising resulting from higher complexity and dynamics in society (Nekkers, 2006). Scenario planning helps managing these uncertainties. It supports radicalization of policies and encourages strategic discussions. The multidisciplinary of the factors involved and the detailed descriptions of possible future scenarios make scenario planning an appropriate method to analyze changes in the backpack market. It enables companies to look ahead and to be prepared to for to all possible futures by implementing the results of the multiple environmental research in their strategy. As Talwar states "‘plan A’ is not longer enough, we also need plan B, C, and D." (2010: 240).
- The environmental scan is supported by a **workshop/focus group**. The goal of this focus group was answering research question 1 (What are the drivers for change of (backpack) tourism?) and 2 (What are the most important and uncertain drivers with regard to backpackers and what scenarios can be defined for the future of backpack tourism?). The workshop consisted of a focus group (panel) of experts in the field of scenario planning, and experts in the tourism (management) sector. Seven scenario planning (and tourism/recreation) experts from the European Tourism Futures Institute and two lecturers of the Bachelor of Business Administration 'International Tourism Management' at Stenden University formed a multidisciplinary panel. Group processes lead to the bundling of knowledge, experience, and perspectives and helps to give a plausible and qualitative research result (Nekkers, 2006). The scenarios are discussed and cross-checked with ETFI's Profes-
- Knowledge, experience and perspectives are bundled in a workshop with experts.
- 19 -

sor Albert Postma (lecturer Scenario planning) and visiting Professor Dr. Ian Yeoman (futurologist, author and speaker) with semi-structured in-depth interviews.

Finally the scenarios are accentuated and further analyzed. With help of the literature review, the expert interviews, lectures and books of Ian Yeoman, trend reports and the excellence of the ETFI, four future scenarios based on market segmentations are painted. For each scenario, a general view of the scenario, the market profile, and recommendations towards the tourism industry are reported. The scenarios help companies to imagine possible futures and has the inspirational aim to make companies think 'out of the box', how to approach this (high potential!) market, and about how to make their strategy future proof.

4. BACKPACK SCENARIOS 2030

Chapter 4 consists of the construction of scenarios whereupon impacts of the scenarios and recommendations are provided. The results of the environmental scan where trends and uncertainties are identified. Here, the most important and uncertain factors classified and the extremes of both factors function as elements of the axes cross. For the third research question, scenarios are drawn based on the four extremes. These scenarios serve as a source of inspiration; once again they are not created to make one choose one out of four. The scenarios are a qualitative tool to analyze a current vision or strategy or to create a new one which is comprehensive and future proof. Furthermore the implications of the scenarios are discussed. The consequences of a future scenario and the degree of anticipation are relevant for tourism businesses. As a result, recommendations to the current tourism sector will be provided in this chapter.

The scenarios are a qualitative tool to analyze a current vision or strategy or to create a new one which is comprehensive and future proof.

DRIVERS OF CHANGE OF (BACKPACK) TOURISM?

An environmental scan has been executed in order to identify important/influential and uncertain factors which are drivers for change of the backpackers' travel behavior. These can be demographic, economic, social-cultural, technological, environmental or political factors. The environmental scan mainly resulted from a workshop held with the focus group on November 5, 2012. The participants discussed in groups what the actual and emergent factors are influencing tourism. After the factors were clustered, they were ranked by the participants on both importance and uncertainty. Moreover factors out of the literature are taken into account.

The focus group consisted of twelve specialists both multidisciplinary researchers from the European Tourism Futures Institute and tourism experts related to the Bachelor of Business Administration course 'International Tourism Management'.



THE MOST IMPORTANT AND UNCERTAIN DRIVERS AND THE SCENARIOS

From the literature review and the workshop the factors concerning technological developments and the amount of travel budget appear to be most influential and uncertain with regard to the future of backpacking. As a matter of fact the innovation in technology will continue, however it is not known in how far travelers wish for this virtualization of their trip at a later stadium since authenticity is getting more valuable. Moreover, economical and political factors highly impact consumer buying behavior in terms of travel choice and on-site spending patterns. Yet disposable income and travel budget are not similar. The literature review shows that backpackers have a higher travel budget than before, however this does not automatically reflect a higher disposable income. The value of traveling may increase, therefore people may put more money aside for it.

The two important and uncertain factors who will create the scenario cross are:

- a possible increase of the influence of virtualization
- a possible higher travel budget

The amount of travel budget and the degree of merge between the virtual and the physical world are constructing the scenario cross. For the axes, the extremes of both factors are used. As a result there are two scenarios with one the one hand a low travel budget and on the other hand a high travel budget on the horizontal axis. On the vertical axis the virtualization is processed: a merge in physical and virtual environment

facing a separation of the physical and virtual environment. The scenarios are named in traveler terms as the report is based on developments in travel behavior. This leads to a scenario cross including the following scenarios

Nowadays we see already a shift into flashpacking, although this is to a limited extend. The question is which scenario would be the most desirable. Although the development tends to continue towards flashpacking, scenarios 1 and 3 are also worth to considerate since linear trends can plausibly deviate. It is possible to relate goal to one scenarios, however best is to take all of them into account since in order to anticipate all trends and future expectations. An illustration of the scenario directions is shown by figure 2.

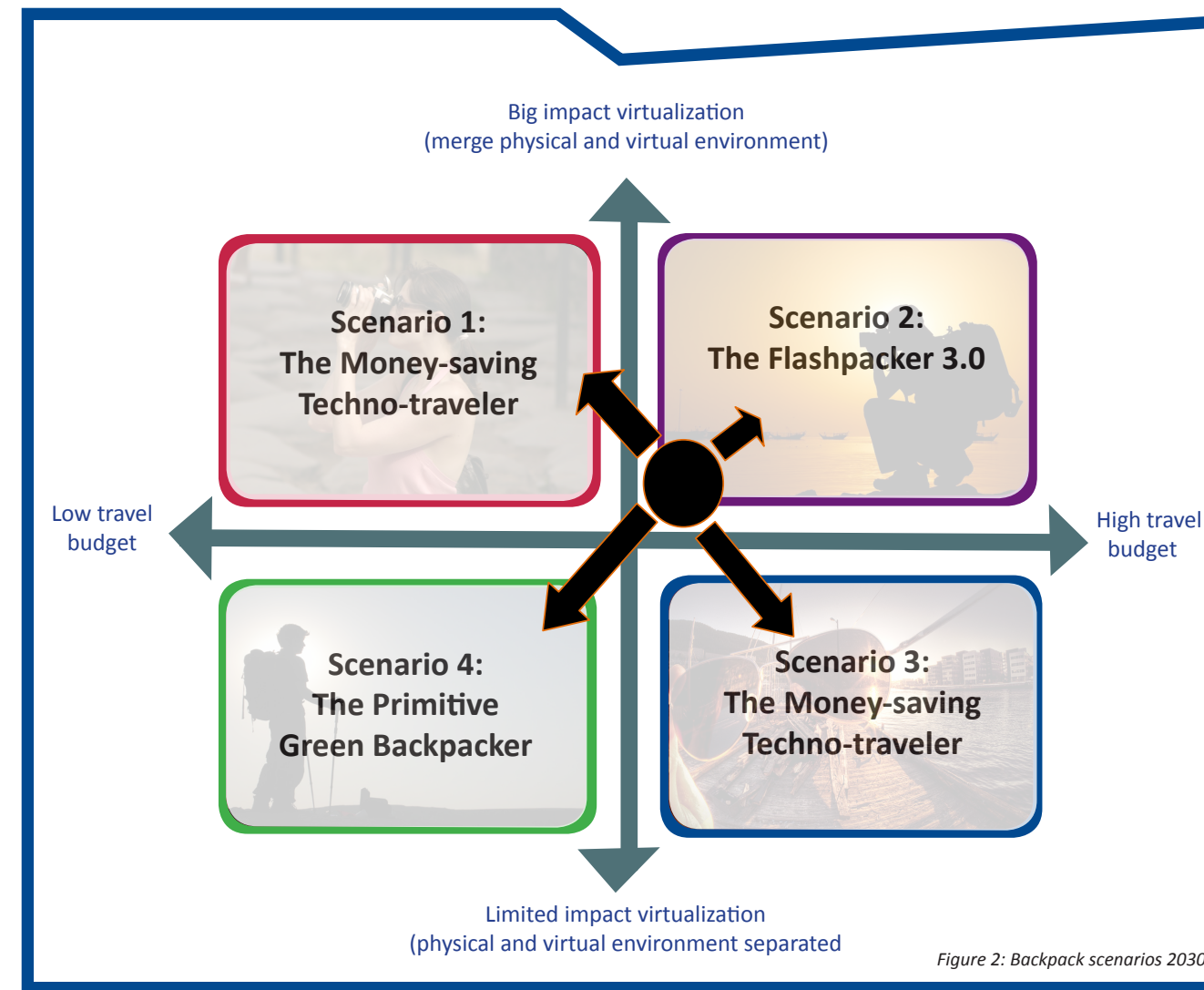


Figure 2: Backpack scenarios 2030

CERTAIN FUTURE EXPECTATIONS 2030

Some characteristics account for each of the four drawn 2030 scenario since the developments are seen as certain:

- Infrastructure will expand and improve so tourist mobility increases (ANVR, 2012);
- Tourists, under which backpackers, are older in average and we will live in an ageless society with vertical family structures rather than horizontal family structures (Yeoman, 2012);
- Global tourism will grow, and destinations will change, there will be an endless choice of destinations;
- We will live in an 'Experience-society' meaning that experience is more important than materialism and time;
- More people will be higher educated in 2025 (Yeoman, 2012);
- The increased pressure on tourism companies to act 'sustainable' lead to more sustainable focusing trips and consumers are highly aware of environmental issues;
- In 2025, the amount of fossil oil is decreased drastically and it will still take approximately thirty years to switch over to sustainable fuel. Oil prices are increased and this is noticeable by travelers. Since 2012, the airline industry is included in the EU Emission Trading System and suffers a decrease due to higher ticket prices by taxes. New airplanes with less carbon emission are introduced (ANVR, 2012).
- Only specialized, tailor-made focusing face-to-face travel agencies do exist, but in a very limited extend. Most travel agencies lost against atomization and therewith direct selling tour operators (ANVR, 2012).
- Furthermore it should be noted that the increase of technology use is a certain factor, however the speed of change and the extend of usage is uncertain. All of the next scenarios include technology, yet in scenario 1 and 2 technology plays a central role in travel behavior and in scenario 3 and 4 it is a side issue.



CHARACTERISTICS AND IMPLICATIONS OF THE 2030 BACKPACK SCENARIOS

All research methods are used to eventually draw the scenarios. The scenarios are filled in by use of the data of the literature review; wishes of the flashpacker are implemented in scenario 3 and the tourist typologies were used in order to describe market profiles. The demand-supply analysis showed that a market focus is relevant in order to help improve supply. The workshop with the focus group was used to identify external factors and these are used for the axes, but also for the content of the scenarios. Furthermore the expert interviews lead to input for the scenarios, as the experts are both tourism and future oriented.

Scenario 1: The Money-saving Techno-traveler

Scenario 1: The Money-saving Techno-traveler

Big impact virtualization, low travel budget

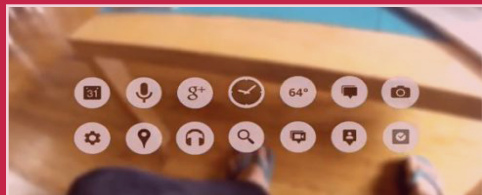
In this scenario, backpackers have relatively much leisure time and they rather focus on **quality of life** than on work and career. Generally backpackers are **price-sensitive**, whether this is related to wealth or not. Backpackers are totally engaged with technology and actively use it. **Internet** plays an important role beforehand and during the trip for searching information. Local facilities implement technological tools and mobile devices of which travelers can make use. Museums and cultural or natural heritage sites offer headphone tours or lend out devices to implement layers of information on mobile tools. Backpackers in this scenario go **sightseeing on own initiative** to lower costs, but do make use of **organized transport**. The worldwide improvements of infrastructure, especially on high-speed rails, lead to an enormous **growth in rail tourism** and it has increased the backpackers' mobility in general. Also long distances are traveled more frequently by road and by rail transport. The Maglev technology has created **faster** (500-600 kilometers per hour), **cheaper, and more efficient trains** that float with help of magnets (Reisgraag, 2012). This will be highly popular in 2030.

The money-saving techno-traveler regularly contacts family and friends at home via **high quality communication systems** as Skype. The speed of sound and visuals is equal to each other, and the visuals are nearly real and projected on a big size on a wall. **Haptic technology** enables the backpacker to literally feel and touch one another via video-chatting as textile-based haptic clothing is provided by applying forces and vibrations (Yeoman, 2012). In the 2030s the segment is also extremely conscious about **sustainability**. In both scenarios 1 and 2 where the impact of technology is high, there is **no longer a language barrier** during one's backpack journey. Smartphones can record and translates languages to each other language. Therefore, **the whole world is accessible for everyone**. **Augmented reality** is essentially on-trip: real-time travel information is provided by the smartphone instead of the guidebook. To save costs, **Wi-Fi is required**. The **smartphone** will be used for getting historical information of buildings, checking menus at restaurants, finding more information about events, searching for discounts and travel arrangements and for navigation. Not only the smartphone enables augmented reality: there are **glasses** now that add the digital layer on your own sight (Reisgraag, 2012). With regard to Maslows hierarchy of needs, in scenario 1 and 3 mainly the basic, the safety and the belonging and love needs are important.



Market profile

The money-saving techno-traveler is a **young** traveler, aged 18-30 years in average, and a big part is student. As with the Primitive Green Tourist in scenario 4, he is **price-sensitive** and does not afford or want to spend a lot of money on their trip. This is not necessarily related to how they value traveling; rather it is about how they give substance to their trip. **Enrichment** is more important than materialism (Yeoman, 2012). He is **dutiful** and he **cares about family**. He prefers to **travel independently**, however he searches like-minded travelers by computing systems and social media. Social computing and affiliate marketing enable future travelers to identify like-minded travelers (ANVR, 2012). The money-saving techno-travelers are **cosmopolitans**, meaning that they are **open** and **curious** to find out global differences and new cultures. They are **explorers** and feel the need to visit 'new' destinations. The money-saving Techno-traveler undertakes **passive activities**, such as 'hanging around'.



Recommendations

- Make use of the innovative integration with new technologies. The Money-saving Techno Traveler does make well-considered investments, however when they do not add significant value, they will not invest again. In this segment, it is important to analyze the customers' preferences by technologies, in order to maximally fulfill the needs and wishes;
- Create digital mobile booking systems for accommodations and excursions;
- Support Wi-Fi on backpack destinations;
- Work with online (peer) recommendations, in order to allow customers to compare and to make the best decision;
- Play a bigger role in the customers' travel journey by also being involved during and after the trip. This is ideally made possible by technology. Tracking your customers and guiding them in real-time will be normal in the future.

Scenario 2: The Flashpacker 3.0

Scenario 2: The Flashpacker 3.0

Big impact virtualization, high travel budget

In this scenario, the Flashpacker 3.0 sees his trip as the **ultimate sabbatical** and does spend money in order to have their **extraordinary experience**. Here, we live in an 'Experience It All-society' which is supported by the internationalization in tourism and the increased mobility. People from all ages do want to have different kind of holidays, since they are now more knowledgeable and culturally aware than ever before. This means that their flashpack trip might be a 'once in a lifetime trip', in order to experience the real, "authentic" world of the backpacker. In this case, they pretend to be a backpacker, although they are actually often **temporary travelers** (Yeoman, 2012). The Flashpacker 3.0 is an **early adopter of technology** (Yeoman, 2012), so they use technologies that have never been used by societies before which may become mainstream later on. We live in an **always-on culture**, so they want to be continuously connected to Internet (ANVR, 2012). In fact, they are now, since mobile networks and Wi-Fi enables travelers to be permanent online, also during a flight. As many technological tools have been merged into a smartphone or smartwatch for the last decades, the **smartphone of 2030** is expected to cover everything. The smartphone will be incredibly small. Smartphones are flexible and foldaway now since they are produced with OLED technology.

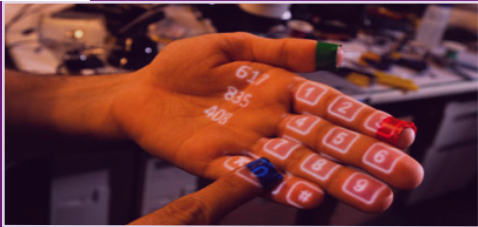
These mobile devices made up of a plastic substrate thinner and lighter than conventional LCD technology can be rolled up, dropped down and be thrown in a backpack (BBC, 2012). The same accounts for tablets and iPads here and paper will be uncommonly seen anymore. **Virtual reality** exists to make travelers experience elements of their trip beforehand and to help them in their decision-making process. **Augmented reality** and **gaming technologies** are totally integrated in the flashpacker's journey. Special **glasses** enable the flashpacker to have the extra digital layer on their own sight. The quick and safe payments go with digital transactions via **Near Field Communication (NFC)**. The **alter ego** (one's online version) of the flashpacker is full of personal information which helps to personalize a trip. Even emotions are recognized and influence travel advice with **cognitive computing** (ANVR, 2012) and geo-localization technologies like GPS. **Wearable chips** enable travelers to be virtually followed by others. Apart from this being useful when entering risk zones, a tour operator can follow their customer and virtually advise them. The Flashpacker 3.0, who still want to dissociate from mass tourists although their behavior nearly meets the mass' behavior, finds fellow 'backpackers' by **social computing**. In this scenario, 'familypacking' has become a trend: young couples travel with their child(ren).

The accommodation choice varies from traditional backpack hostels (although these have facilities such as WiFi and social computing devices) to luxurious resorts. The adaptation level here is decreased, since backpackers experience **virtualization** rather than the physical environment. The evolution of technology helps society to think and act **sustainable** by 2030, for instance by not actually visiting the emerging rain forests but experiencing it via virtual reality. This allows travelers to have an experience and to get aware in once. As the flashpacker has limited time but enough money to spend, activities are undertaken in forms of **organized excursions**. So the scenario allows destination services to interfere by offering packages since the main group of backpackers is not that independent anymore. Also tour operators can more easily reach this traveler for selling packages. **Tailor made programs** based on experiences play an important role (ANVR, 2012).



Market profile

According to Yeoman (2012), the flashpacker is a **high achiever** and a **postmodern** in terms of the tourist segments of the Dutch Board of Tourism and Congresses (NBTC). The NBTC (2012) describes the segmented 'achiever' as an **independent** and **impulsive** traveler who is **open for innovation and change**. He is **international oriented**, **free from traditions and norms**, and work and his career is important. Most achievers are aged between **20 and 30 years old** and have an **average level of education** though a relative high income. The postmodern wants, similarly to the achiever, to develop and to experience, and they share the need to achieve a middle to high status. The postmodern is also open for innovation and change, and wants to have experiences in terms of **enrichment** rather than having materialism. He is **individualistic** and requires **freedom**. Both education and income are relative high. As with achiever, the **Internet** is important. The postmoderns are a mixed demographic group, but most are singles or couples. The flashpacker 3.0 is in average a middle class 30+ traveler and is **fully engaged with technological equipment**. All kinds of tools will be brought with them, including an iPad with e-Books, a smartphone with augmented reality and travel apps, communication systems and digital translators. This flashpacker is rather associated with **egocentrism** than ecocentrism since **self-actualization** is related to wealth (Yeoman, 2012). They want to gain experiences for their own fulfillment. However, all travelers are **sustainable conscious** and so are the (also the 'once in a lifetime') flashpackers.



Recommendations

- Sell real-time travel information via smartphones (apps);
- Create digital booking systems for accommodations and excursions;
- Offer high quality, quick and multilingual transportation;
- Provide clear online information. Since the Internet is overloaded with (travel) information, structure, clarity and reliability is essential. Travel choices will be made based on online information. This can ideally be provided via mobile apps; so provide customer-related travel app;
- Play a bigger role in the customers' travel journey by also being involved during and after the trip. This is ideally made possible by technology. Tracking your customers and guiding them in real-time will be normal in the future.
- Change "make" strategy into "buy" strategy (ANVR, 2012): due to the technological evolution there will not be enough money to stick to the "make" strategy where technology systems are developed in-house in order to compete. Therefore tourism businesses have to cooperate with each other in the field of technology and adopt a "buy" strategy.

Scenario 3: The Anti-tech Glampacker

Scenario 3: The Anti-tech Glampacker

Limited impact virtualization, high travel budget

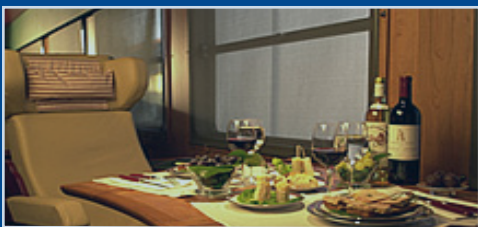
In this future scenario the main group of backpackers shares the [anti-technology ideology](#). Instead of being lead by digital devices they spend money on-site to have an exclusive backpack holiday that may take a couple of months. Technology does not play an important role. This type of backpacker is associated with 'glampacker' because he is willing to pay whatever it takes to have a [unique experience](#). He feels [responsible](#) for the environment, but values his own experience also as high. In order to realize the extraordinary, the anti-tech glampacker stays in [unique accommodations](#), such as ice accommodations or wigwams. Also sleeping in wine barrels, in sand castles, sea containers and eco-accommodations is conceivable. In this scenario, the period of travel time is has expanded 20% compared to 2012 (ANVR, 2012) and long distances are traveled by plane in order to save time. [Rail cruises](#) are very popular by now and in this traveler makes fully use of the opportunity to explore landscapes by a luxurious cruise by rail. This traveler is [risk-averse](#).

The anti-tech glampacker and the primitive backpacker also do use the Internet in 2030, since every single travel will be involved in the digital revolution, however they are less technology and social media aware (Yeoman, 2012). They also bring a mobile phone with them. The difference in these scenarios is the degree of how merged the traveler is with that technology, and how much he uses it. The anti-tech glampacker wants [ultimate relaxation](#) and may go for [wellness](#) arrangements. He can be even associated with the '[health tourist](#)', when the traveler makes use of beauty-enhancing services such as plastic surgery, sex change or whitening teeth (Yeoman, 2008). Although the backpack market has significantly grown, it cannot be associated with economies of scale because trips are still personalized. Also in this scenario, '[familypacking](#)' will be common.



Market profile

This type of traveler found a balance between ecocentrism and egocentrism. The anti-tech glampacker can be typically associated with champagne brunches and jacuzzis; ingredients to make their trip **romantic breaks**. All scenarios have 'independent' travelers, although especially the Flashpacker 3.0 and the Anti-tech Glampacker are going to look like **package travelers** because they are willing to pay for organized elements in order to save time. Glampackers are **allocentric oriented**, so they are in search for **cultural and environmental differences** and are **adventurous**. They want to reach a higher level on Maslow's need hierarchy, aiming to reach the **self-actualization** level.



Recommendations

- In this scenario, travel agents have the biggest chance to survive. Not surprisingly this is only possible when they provide a service which the Internet cannot provide. Information exchange should consist of expert advice focused on personal requirements of customers. These 'customer experience specialists' should know their customers by integrated information on computer systems;
- The need to explore new destinations forces travel agents and direct sellers to be knowledgeable of all (new) places in the world and to inspire their customers;
- Next to activity-based travel, the Anti-tech Glampacker is willing to pay for wellness. Combining authentic destinations (for instance with a sightseeing tour) with wellness and relaxation is appealing to this segment. Multilingual information should be provided on-site as well as digitally;
- The Anti-tech Glampacker is often a food tourist, so food should have a high quality and is preferably local. The restaurant choice is rather made at the moment than beforehand via online recommendations. Therefore, restaurants should appeal tourists by their physical appearance and hospitality.
- Create a Shopping Xperience: offer shopping vouchers with combination of other activities. Check-in systems track the shopping route.
- Provide cultural and educative packages including sightseeing

Scenario 4: The Primitive Green Backpacker

Scenario 4: The Primitive Green Backpacker

Limited impact virtualization, low travel budget

In this scenario, the trends leading to flashpacking have not continued. A reason for this might be travelers who struggle with the digital revolution and want to dissuade from technological innovations, because it restricts people from having direct, face-to-face communication and having authentic travel journeys. This **young** and **price-sensitive** market sticks to the idea that social media users become depressive because in their social network all people look idealistic, making others unhappy. A big part of the society is controlled by the digital world, and when backpacking tended to change, real backpackers went ‘**back to the basics**’. In this scenario, backpackers are in search of those typical **holiday romances** and generally adapt to a certain **pub culture**. The primitive green backpacker is motivated to explore a destination and its inhabitants and prefers to have **high local interaction**.

For this reason he appreciates **local hospitality** and makes use of it, at the same time this lowers costs. **Couch surfing** is commonly done in this scenario as well **air B&B’ing**, meaning that backpackers make use of a couch or a room of other travelers who offer it for free or for a very low price, sometimes in exchange of a service or a small present. In this scenario, backpackers want to **explore**. It should be taken into account that more destinations will be explored and go through the destination life cycle. The money-saving techno-traveler and the Flashpacker 3.0 are less eager to find out the unexplored. **Eco-tourism**, **voluntourism** and **working while traveling** are hypes in this 2030 scenario. As with scenario 1, the primitive green backpacker aims to fulfill basic, safety, and belonging and love needs.



Market profile

The Primitive Green Backpacker is generally **young** and **price-sensitive**. He disassociates from the modern technologies, however he uses is for practical operations. He has social media profiles but does not actively use them while traveling. The primitive backpacker is typically a **slow traveler**: he reacts against speed of development, seeks for real experiences and enjoys life's pleasures. This **traditional** traveler is devoted to **nostalgia** and prefers destinations to be preserved (NBTC, 2012). He is in search of **local interaction**. In both scenarios 3 and 4 the backpack segment are **explorers**, meaning they are the first ones exploring or re-exploring a destination. This backpacker is motivated by their need to have ultimate relaxation and to **refresh body and mind** and therefore might take a longer period of time. This type of backpacker is **ecocentric** rather than egocentric and so **sustainable aware**; the adaptation level in this scenario is high.



Recommendations

- Focus on activity-based travel: sailing, surfing, safaris and events are expected to be growing sectors in tourism. A condition for this scenario is that the activities have reasonable prices since the Primitive Backpacker makes well-thought-out buying decisions where the price-quality relation is decisive. Travelers become more interested in doing sports since they want to stay vital and life longer, due to the ageing of society.
- Promote natural sites, such as beaches.
- Offer walking- and cycling routes.
- Do not compete with couch surfing and air B&B's, rather cooperate.
- Hasten sustainable tourism. In addition to the pressure of businesses to act sustainable, -in all scenarios- travelers themselves are becoming more climate change aware and sustainability will have a central position in tourism in 2030.

Conclusions

According to professors Ian Yeoman and Albert Postma (European Tourism Futures Institute, 2012), scenario 2 – The Flashpacker 3.0, is the scenario most likely to happen. Since the continuing trend of implementing technology in daily life is certain, technology will play an important role in tourism 2030 anyway. If the backpacker indeed turns into the flashpacker, this will have significant consequences for the backpack sector.

Flashpackers will let themselves lead by technology rather than travel guides, fellow travelers, and local inhabitants. Mobile travel apps and social media will take a central role in one's flashpack experience. As a result, there might be less interaction between flashpackers and the local community. On the other hand, the integration of technological tools and mobile guidance might increase the desire to be contact with local inhabitants. The need to experience the authentic, the 'cosmopolitanism' increases and even the 'temporary flashpackers' want to experience the 'real' culture. A balance will be found between the virtual and the physical experience of the flashpacker.

The virtual distance between the flashpacker and his home environment reduces since the world is connected to the world at anytime. Flashpackers can constantly contact home and family and friends can track the trip. Communication will run smoothly and visuals are projected as if the contact is face-to-face. As flashpackers will be less isolated than the backpacker was ever before, the threshold to actually go backpacking becomes smaller. Also people that get homesick soon start to travel in a couple of years because of the realistic communication systems and the always-online trend. Like-minded travelers are easy to find and maps with all facilities are available at anytime.

For these reasons, the flashpack segment will be way bigger than the backpack segment is now and flashpacking will not be unique anymore. A part of the segment will be 'one-time flashpackers', temporary flashpackers who want to experience the real 'backpacking' for just once or twice. The primitive backpacking as we know it now will nearly not exist anymore, since all travelers will be engaged with technology in 2030 (Yeoman, 2012). The combination of the bigger amount of flashpackers, the increase of organized activities, and the broader variety of accommodation forms leads to flashpacking getting closer to mass tourism. Although backpackers nowadays share the ideology against mass tourism, this aversion will fade as both tourist types become more similar to each other.

Most of the world has been explored by now. As flashpackers are in constant search of authenticity and therefore new and preferably unexplored destinations, 'new' destinations become scarce. The wealthier travelers are, the more destinations will be explored. As it will be hard to explore new destinations, flashpackers will re-explore places, so visit destinations for different purposes than how it was visited before (for instance: a region where previously was a war, will be visited through wonderful nature). Flashpacker are, however, safety conscious.

Since flashpackers have little travel time and a relative high travel budget, they will eventually buy (excursion) packages as they want to see a lot of the culture, but want it to be organized for them. This will go in stages, so that the aversion against activities that are not independent will fade. On-site facilities will help flashpackers spending their money. As destinations might respond on the developments in the back-/flashpacker scene, more facilities and services will be offered. All in all this could eventually result in back-/flashpackers and 'normal' tourists being unintentionally melted together, or at least approach each other. Not only budget accommodations such as hostels will focus on flashpackers. As flashpackers will overnight in different forms of accommodations, also luxurious resorts could expect flashpackers. The tourism sector will experience nuances in terms of travel preferences, leading to targeting and segmentation to become more difficult.

Recommendations

Although scenario 2 is the scenario most likely to happen, in order to make strategies in the tourism sector future proof, all scenarios have to be taken into account. In order to implement a future proof and comprehensive strategy and to obtain a high market position in the high potential backpack/flashpack market, the next recommendations can be taken into account. Since backpackers are independent travelers, they do not occupy an important position within the tour operator and travel agency industry. However, the recommendations are directed towards backpacker advice agencies as well as tour operators and travel agencies. Instead of the backpacker who was formerly an explorer or even a drifter, the glampacker looks like Cohen’s tourist type ‘individual mass’, meaning that some elements of the trip are organized. So flashpackers will be more interested in organized travel and will more and more look like the mass tourist. For that reason, the next recommendations are also relevant for tour operators and travel agencies.

- Highlight sustainable tourism. As the future traveler will be better aware of the climate change, tourism businesses have to work on a collective vision to minimize carbon footprints of tourism.
- Focus. Offering ‘everything to everyone’ will not be the case anymore in 2030. Tourism businesses have to specialize and be experts. However, knowledge about your customer may become more important than destination knowledge, since the Internet offers all destination information already.
- The tourism sector will have to orientate more on customer relations than on travel packages and purchases; services instead of products. Therefore, quality of employees will be far more important than quantity in tourism 2030. To realize the ultimate human resources policy, companies should ultimately utilize passions and talents of employees. Branding might become more important than the recruiting process in order to pull the right employees. Furthermore, involve different hierarchical employees with decision-making processes in order to engage them and to gain more strategic input.

- Mobility significantly increases and backpackers want to experience as most as possible during their trip. Therefore it is important to provide diverse packages/facilities on diverse locations. Make use of different modes of transport. The backpacker of 2030 loves to combine luxurious and simple, fast and slow means of transportation. Therefore a rail track which is offered nearly everywhere in 2030 can be provided/advised, as part of the backpack trip.
- Take into consideration that flashpack families with vertical family structures are upcoming. The hotel sector is already working on the flashpack trend by building flashpack accommodations, where will probably be also place for (young) families already. By including this market in the portfolio a company will be one step ahead of others who significantly do not offer packages/facilities/advice specialized on this ‘familypacking’.
- Add an educative aspect on the backpack journey. As Dutch people will be higher educated than ever before and to experience the enrichment rather than materialism, backpackers will be more eager to learn and to know what they are sightseeing.
- Sporting is becoming more important. Although ‘hanging around’ has been one of the main motivations of backpackers for a long time, this is no longer enough. Travelers become more interested in doing sports since they want to stay vital and live longer, due to the ageing of society. People want to combine sports with experiences. Therefore it is relevant to implement sports elements in journeys/advice.
- Be (increasingly) innovative in product development and offer tailored experiences. The society of individualism we are facing requires tourism businesses to anticipate changes and diversification of interests, tastes and wishes of the consumer.

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European Tourism Futures Institute

Visiting address: Rengerslaan 8, 8917 DD Leeuwarden

Post address: Postbus 1298, 8900 CG Leeuwarden

Phone number: 0 58 244 1992

info@etfi.eu / www.etfi.eu



Stenden



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