Backpacker Tourism within Southeast Asia: Thailand's Competitors from the Australian Perspective

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ABSTRACT

The South-East Asia region hosts a great number and variety of international tourists, including backpackers. As a long-established backpacker destination, Thailand, through its national government, acknowledges it is facing ongoing competition from other destination nations both within and outside of the region. Although studies on destination image are extensive and ubiquitous within the tourism literature, few studies examine backpacker tourism in the context of the image perceptions of a destination's competitors. This paper identifies the immediate competitor backpacker destination nations for Thailand within Southeast Asia and among the global growth in backpacker tourism, acknowledges Australia as the highest economic contributor. Using a structured survey with 19 standardized destination attributes, this paper assesses image perceptions of Thailand's competitors from the perspectives of Australian citizens. The findings reveal that Singapore and Indonesia are the immediate competitors for Thailand with their respective competitive strengths and weaknesses of "sameness" and "difference" from the Australian population highlighted. These findings provide valuable marketing implications for Thailand in managing its brand images, particularly those held by Australians. Such findings can support Thailand to improve its competitiveness within international backpacker markets. New insights generated from these findings are distinctive as they are the first to engage an underexplored backpacker market to understand how they perceive Thailand as a destination against its competitors.

Keywords: Backpacker, Tourism Competitors, Destination Image, Thailand, Southeast Asia, Australia

การท่องเที่ยวสะพายเป้ในภูมิภาคเอเชียตะวันออกเฉียงใต้ : คู่แข่งขันของประเทศไทยในมุมมองของชาวออสเตรเลีย

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บทคัดย่อ

ภูมิภาคเอเชียตะวันออกเฉียงใต้ถือเป็นจุดหมายปลายทางการท่องเที่ยวที่นักท่องเที่ยวชาวต่างชาติเดินทางมาเป็นจำนวนมาก สำหรับประเทศไทยนั้นถือเป็นจุดหมายปลายทางการท่องเที่ยวที่มีชื่อเสียงมายาวนาน และทางรัฐบาลไทยก็ได้ตระหนักถึงสภาพการณ์ทางการแข่งขันที่เพิ่มขึ้นสูง ทั้งจากคู่แข่งขันภายในภูมิภาคเดียวกันและคู่แข่งขันจากต่างภูมิภาค ถึงแม้ว่างานวิจัยทางด้านภาพลักษณ์ของแหล่งท่องเที่ยวจะมีอยู่เป็นจำนวนมาก แต่ประเด็นการวิจัยที่เกี่ยวข้องกับคู่แข่งขันทางการท่องเที่ยวสะพายเป้ยังขาดแคลน งานวิจัยนี้จึงมีวัตถุประสงค์เพื่อศึกษาคู่แข่งขันหลักของประเทศไทยในฐานะที่เป็นจุดหมายปลายทางการท่องเที่ยวสำหรับนักท่องเที่ยวสะพายเป้ในภูมิภาคเอเชียตะวันออกเฉียงใต้ท่ามกลางสภาพการณ์แข่งขันที่เพิ่มสูงขึ้นของตลาดการท่องเที่ยวดังกล่าวในปัจจุบัน โดยศึกษาจากมุมมองของนักท่องเที่ยวชาวออสเตรเลีย ซึ่งถือเป็นตลาดนักท่องเที่ยวที่สร้างรายได้สูงสุดกลุ่มหนึ่งให้กับประเทศไทย งานวิจัยนี้เก็บรวบรวมข้อมูลโดยใช้แบบสอบถามแบบมีโครงสร้างซึ่งใช้คุณลักษณะของจุดหมายปลายทางการท่องเที่ยว จำนวน 19 คุณลักษณะ เพื่อประเมินภาพลักษณ์ของประเทศไทยและประเทศคู่แข่งขันในภูมิภาคเอเชียตะวันออกเฉียงใต้จากมุมมองของประชากรชาวออสเตรเลีย ผลการวิจัยพบว่า ประเทศสิงคโปร์และประเทศอินโดนีเซียเป็นคู่แข่งขันหลักของประเทศไทยในฐานะเป็นจุดหมายปลายทางการท่องเที่ยวสะพายเป้ ซึ่งมีคุณลักษณะด้านจุดแข็งและจุดอ่อนทางการท่องเที่ยวที่มีทั้งความคล้ายคลึงและมีความแตกต่างกับประเทศไทย ผลการศึกษาของงานวิจัยนี้เป็นประโยชน์ต่อประเทศไทยในด้านการกำหนดภาพลักษณ์ของประเทศ โดยเฉพาะอย่างยิ่งเพื่อดึงดูดกลุ่มนักท่องเที่ยวชาวออสเตรเลีย และยังช่วยสนับสนุนต่อการเพิ่มขีดความสามารถทางการแข่งขันของประเทศไทยในการเป็นจุดหมายปลายทางการท่องเที่ยวสะพายเป้ในระดับสากล นอกจากนี้ ผลของการศึกษานี้ยังเป็นประโยชน์ต่อวงการวิชาการด้านการท่องเที่ยว โดยเฉพาะอย่างยิ่งองค์ความรู้ใหม่เกี่ยวกับกลุ่มตลาดนักท่องเที่ยวสะพายเป้ ในประเด็นทางด้านการรับรู้ที่มีต่อการแข่งขันของประเทศไทยในฐานะการเป็นจุดหมายปลายทางการท่องเที่ยวสะพายเป้

คำสำคัญ : นักท่องเที่ยวสะพายเป้ คู่แข่งขันทางการท่องเที่ยว ภาพลักษณ์ของจุดหมายปลายทางการท่องเที่ยว ประเทศไทย เอเชียตะวันออกเฉียงใต้ ออสเตรเลีย

INTRODUCTION

The intensifying competitive destination-environment for the growing international tourism segment of backpacking is cause for urgent investigation. Rival destinations, through their national tourism policy advisors and marketers, need more robust understandings of both their own nation destination and also those of their competitor destinations, specifically from the images held by visitors and non-visitors (Ahmed, 1991; Caber, Albayrak, İsmayıllı, 2017; Calantone, Di Benedetto, Hakam, & Bojanic, 1989; Henkel, Henkel, Agrusa, Agrusa, & Tanner, 2006; Javalgi, Thomas, & Rao, 1992; Ooi & Laing, 2010). To develop positioning strategies for a destination, destination marketers should be connoisseurs of the perceived strengths and weaknesses of their own destination brand, as held by travellers, as well as that of their competitor destinations from both past and potential travellers. Such understanding will provide valuable underpinning to the creation of a contemporary positioning strategy for their particular destination. Such real-time knowledge can assist the destination practitioners to assess whether the traveller perceived images are matched with the destination's attributes. If there is any divergence, destination practitioners will be better placed and more responsive to altering the image projections originating from the destination. Through receptive external repositioning supported by internal operator educational programs, improvements in tourism products, services, or even both will ensue (Ahmed, 1991; Calantone et al., 1989; Chen, Lai, & Petrick, 2016; Morgan & Pritchard, 1998).

The United Nations World Tourism Organization (UNWTO) projects international tourist arrivals globally to grow 3 to 4 per cent in 2017. Africa and the Asia Pacific are both projected to grow at highest rate of 5 to 6 per cent (UNWTO, 2017). The direct contribution of the travel and tourism industry itself to GDP (Gross Domestic Products) is projected to rise by 4.2 per cent per annum between 2016 and 2026; to approximately US$ 3469 billion (World Travel & Tourism Council, 2016). Asia Pacific accounts for 24 per cent of the world's arrivals and 33 per cent of receipts. In 2016, the region welcomed 303 million international tourist arrivals which reflect 8 per cent growth over the previous year. This is making the Asia Pacific one of the fastest growing regions for tourism (UNWTO, 2017). Within this region, the South-East Asia and Oceania sub-regions are recorded as the strongest growth (UNWTO, 2017).

In part, a phenomenon driving growth, and one that has gained much attention around the world, particularly from the young generations is backpacking (Dodds, Graci, & Holmes, 2010; Ooi & Laing, 2010; Pearce, 2006; Richards & Wilson, 2004a). Backpackers are recognised by some researchers (Maoz, 2005; Scheyvens, 2002; Sroypetch, 2015) as budget-minded travellers staying in destinations for longer periods of time and with higher than average spending per trip when compared to conventional tourists. Backpackers are considered to distribute spending more broadly bringing economic benefits to distant and economically struggling regions beyond typical tourist hotspots (Baskin, 1995; Cohen, 2003; Gibbons & Selvarajah, 1994; Jarvis, 1994; Ooi & Laing, 2010; Scheyvens, 2002). Accordingly, backpackers can provide much-needed income for people in remote regions, and more particularly those in less developed countries (LDCs) (Hampton & Jeyacheya, 2014; Sroypetch & Caldicott, 2017).

There is evidence suggesting that backpacker tourism is more engaging with the economic sphere for the local communities than other types of conventional tourism (Ashley, 2006; Cohen, Duncan, & Thulemark, 2015; Hampton, 1998; Sroypetch, 2015). For instance, the study by Ashley (2006) on backpacking in Luang Prabang Province of Laos indicated that approximately 30 per cent of backpacker spending reaches the poor when compared with just 17 per cent of the total spending by upmarket tourists. Furthermore, development of the backpacking industry in Thailand's Mae Hong Son Province has positively transformed Pai's economy through its generation of jobs and income for the local residents (Cohen, 2006; Muangasame & McKercher, 2015). Additionally, backpacker tourism generated economic prospects for grassroots people in Sosrowijayan *kampong* (village) in Yogyakarta, Indonesia, through the small-scale, locally owned tourism businesses (Hampton, 2003). As such, better understanding about this market segment is arguably considered as important for the global development of backpacker tourism.

South East Asia is one of the oldest backpacker trails internationally and has remained one of the most popular primary backpacker destinations since the 1970s (Hampton, 2013). Among the many South East Asian nations, Thailand hosts the greatest number of backpackers (Brzózka, 2012; Richards & Wilson, 2004b). The international tourism sector accounts for 13 per cent of the total economic employment for Thailand (Central Intelligence Agency, 2015; World Travel and Tourism Council, 2013). Nevertheless, like other nations, Thailand faces growing competition from other countries both within and outside the Asian southeast region. Within the region, Thailand is competing with long established tourism destinations like Indonesia and Malaysia as well as emerging destinations like Vietnam, Cambodia; and most recently, Myanmar (Hampton & Jeyacheya, 2014; Runckel & Associates, 2015). To increase the competitiveness of Thailand, as an international backpacking destination, local tourism practitioners and national tourism marketing agencies must pay close attention to learning who are the direct competition and also how the image of each competitor is perceived by past and potential visitors.

In respect to inbound tourism for Thailand, Australia ranks in the top three tourism generating countries injecting the highest dollar-value of annual tourism receipts (Tourism Economic Review, 2015). During 2015, the $AUD daily trip spend was the highest among international visitors and equivalent to 5587.14 Baht or $157 US (Department of Tourism, 2016). In terms of this economic contribution, Australian visitors are considered by the Thai Tourism Ministry as a significant market for the Thai tourism industry (Tourism Economic Review, 2015; Webb & Chotithamwattana, 2013). Therefore, to better understand the view of the Australian population regarding Thailand, and its competitor destinations, is regarded as vital for Thailand to maintain and grow its peak backpacker tourism destination status.

Destination image has been widely researched in the general tourism literature (Akhoondnejad, 2015; Ali, Ryu, & Hussain, 2016; McDowall & Choi, 2010; Prayag, 2009; Tavitiyaman & Qu, 2013). However, there are relatively few studies concerning the image perceptions of a destination's competitors. Within the backpacker tourism context specifically there is a research gap on competing destinations as perceived backpacking destination. In seeking to close this academic void, this paper analyses the competitors of Thailand as a backpacking destination within the bounds of the South-East Asian nations. It highlights the immediate competitors of Thailand for backpacker market share and also Thailand's image perceived by international visitors generally and the Australian market specifically. This study also examines whether Australian citizens are holding differing views regarding Thailand, perceived as a backpacking destination, based upon their past backpacking experience to Thailand (Akhoondnejad, 2015; Hung, Lee, & Huang, 2016). From a practice standpoint, this study reveals strengths and weaknesses of Thailand's competitors as backpacking destinations as held by international visitors. It offers important insights for Thai officials assisting them to identify their own competitive strengths and weaknesses against their competitors. The findings can support Thailand's Ministry of Tourism in developing effective and sustainable tourism policy. This can underpin marketing strategies and action plans to attract Western international markets implicitly and the Australian market explicitly (Akhoondnejad, 2015; Chen & Uysal, 2002; Dwyer, Forsyth, & Rao, 2000; Gomezelj & Mihalič, 2008; Muangasame & McKercher, 2015; Wattanacharoensil & Schuckert, 2016).

LITERATURE REVIEW

Destination Image

The term "destination image" often refers to consumers' perceptions of a particular destination (Day, Skidmore, & Koller, 2002; Hunt, 1975). MacKay and Fesenmaier's (1997, p. 538) seminally define destination image as 'a composite of various products (attractions) and attributes woven into a total impression'. They suggest destination image may be of a country, a state, a region, a city, a particular location or attraction. More recently, Tavitiyaman and Qu (2013, p. 70) proposed destination image be defined as 'the sum of beliefs, ideas and impressions that a person has of a destination'. In spite of the technical definitional differences destination image is commonly cited as an important factor in the assessment of tourists' behaviour at all stages - before, during, and after - the vacation experience (Akhoondnejad, 2015; Ali et al., 2016; Bigne, Sanchez, & Sanchez, 2001; Cohen, Prayag, & Moital, 2014; Fakeye & Crompton, 1991; Gunn, 1988; Henkel et al., 2006).

For pre-trip behaviour, destination image typically affects the destination selection process (Akhoondnejad, 2015; Ali et al., 2016; Ashworth & Goodall, 1988; Chi & Qu, 2008; Gartner, 1993; Gunn, 1972; Hung et al., 2016; Mansfeld, 1992). For post-trip behaviour, Chen and Tsai (2007) and Hung et al. (2016) found that destination image tends to have the powerful impact on visitors' intention to revisit a destination and willingness to recommend it to others. Previous visitation or direct experience with a destination has the potential to alter the image of the destination. Several studies have examined image alterations caused by direct destination experience (Akhoondnejad, 2015; Ali et al., 2016; Baloglu & McCleary, 1999b). Though Ahmed (1991) noted it is essential to factor a destination's image as perceived by both actual and potential visitors in determining the competitiveness of a particular tourist destination, alarmingly, three decades after Ahmed's exposure there still remains a dearth in studies focused on assessing destination image perceptions in respect of both destination visitors and non-visitors (Cherifi, Smith, Maitland, & Stevenson, 2014; Chon, 1990; Henkel et al., 2006; Prebensen, 2007).

DESTINATION IMAGE FORMATION PROCESS

The destination image is formed by a multifaceted process in which individuals develop a mental construct based upon a few impressions elicited from an abundance of impressions (Echtner & Ritchie, 2003). These impressions are often originated through information acquired from non-tourist and non-commercial sources. Such information, incubating from engagement with various media, education and the views of family or friends leads to the formation of the organic destination image (Ali et al., 2016; Gunn, 1988; Hung et al., 2016). The information received through conscious effort of and from the travel industry, namely agents and their intermediaries, through promotional literatures such as guidebooks, magazines, television advertising and tour package brochures are classified as induced images (Akhoondnejad, 2015; Gartner, 1993; Gunn, 1988; Molina, Gómez, & Martín-Consuegra, 2010). According to Baloglu and McCleary (1999a) and more recently Akhoondnejad (2015), such induced images are shaped by two key factors; stimulus and personal factors. The stimulus factors include the external stimulus and physical object (e.g. information source, recommendations of friends and relatives, word and e-word-of-mouth) as well as past experience. The personal factors are the social and psychological characteristics of the individuals (e.g. motivations, preferences, personal characteristics).

There are two main components of destination image: cognitive (or perceptual) and affective (emotional) (Akhoondnejad, 2015; Baloglu & McCleary, 1999a). The cognitive component refers to beliefs and knowledge about a destination (e.g. good climate, good value for money, personal safety, and friendly people) and affective refers to feelings about a destination (e.g. distressing/relaxing; unpleasant/pleasant; gloomy/exciting). Mayo (1975) claims that tourists tend to only have fragments of knowledge about destinations which they have not visited. However, they are able to form an image of the ideal destination as well as the images of alternative destinations in their minds. As such, studies concerning both visitors and also non-visitors perceptions of a destination and its alternative (competitor) destinations would be acutely valuable for destinations in developing effective marketing strategies for destinations.

PREVIOUS RESEARCH IN DESTINATION IMAGE

The study of destination image surfaced in tourism research with the work of Hunt (1971) and Gunn (1972). Mayo (1973) also began to demonstrate the importance of destination image in tourism development. Since those seminal works, destination image has become a highly researched theme in the tourism literature (Agapito, Oom do Valle, & da Costa Mendes, 2013; Ali et al., 2016; Echtner & Ritchie, 2003; Konecnik & Gartner, 2007; Morgan & Pritchard, 1998; Pike, 2002; Sharma & Gursoy, 2015). Predominantly the studies focus on the receiving destination's image perceptions. However, studies focusing on perception of the receiving destination's competitors remains considerably underexplored. Baloglu and Mangaloglu (2001) noted that destinations generally compete based upon their own perceived image as opposed to perceived images of their competitors within the generating region marketplace.

Within this disparate environment this research suggests destinations need to be continually assessing their competitive positions against their immediate rivals. This practice of continuous monitoring and realigning can assist the tourism practitioners to identify their competitive strengths and weaknesses beyond their own destinations and benchmark against their competitors (Ali et al., 2016; McDowall & Choi, 2010; Tavitiyaman & Qu, 2013). Such insight will assist destinations to move beyond simply sustaining their image but rather to adjust and grow their destination competitiveness (Crouch & Ritchie, 2000; Dwyer et al., 2000; Gomezelj & Mihalič, 2008; Muangasame & McKercher, 2015). Thus, to understand the strengths and weaknesses of a destination's competition is valuable for tourism policy-makers, marketers, planners and developers responsible for the tourism "direction" aimed at sustainable development within resilient destinations (Chaisawat, 2006; Chen & Uysal, 2002; Muangasame & McKercher, 2015; Sroypetch & Caldicott, 2018; Wattanacharoensil & Schuckert, 2016).

Among the few studies that focus on competing destinations through image, Baloglu and McCleary (1999b) compared the perception images of American visitors and non-visitors of four Mediterranean destinations including Turkey, Egypt, Greece, and Italy. Their findings indicated the existence of significant variances by visitors and non-visitors across all 19 image dimensions (cognitive, affective and overall image) for those four countries. Their study also revealed strengths and weaknesses of those four countries from an American traveller perspective. Enright and Newton (2004) assessed Hong Kong's key competing destination among cities in the Asia Pacific. The findings suggest that Singapore, Bangkok, Tokyo and Shanghai are Hong Kong's immediate competitors as urban tourism destinations. However, Singapore is considered as Hong Kong's direct competitor. Following the methodology of Baloglu and McCleary (1999b), this current study examines Thailand's immediate competitors among the Southeast Asian destinations. As the leading backpacking destination within Southeast Asia, Thailand's competitors are assessed through the perception lens of two groups of Australian travellers; those with past travel experience of Thailand and those without past travel experience in the destination.

CASE STUDY: THAILAND

Tourism, including backpacking, is recognised as one of the key pillars of economic growth in developing countries (Cohen, 2015; Hampton, 1998; Sroypetch & Caldicott, 2018). With the diverse array of tourism resources and experience offerings in Thailand, coupled with cost-effective external access and cheap internal transports, Thailand is already a well-established international travel destination in the Asia Pacific (CNBC International, 2016). In 2015, the WEF or World Economic Forum (2015) developed the Travel & Tourism Competitiveness Index (TTCI) which benchmarks 90 individual destination indicators divided under four sub-indexes including "enabling environment", "travel and tourism policy and enabling conditions", "infrastructure", and "natural and cultural resources". These indicators are considered by WEF as leading reinforcements of a sustainable development culture within a destination's tourism sector and further contribute to the competitiveness of that destination. Against the TTCI benchmarks, Thailand ranks third in Southeast Asia, seventh in Asia and 35th of 141 destinations worldwide. In comparison among the Southeast Asia countries, Singapore ranked number one and Malaysia ranked second before Thailand.

Despite its third place ranking, the tourism industry remains a central component of Thailand's economy accounting for 19.33 percent of GDP (World Travel & Tourism Council, 2015). Thailand's status as a leading international destination is particularly buoyed by its backpacker sector (Brzózka, 2012; Richards & Wilson, 2004c; Wattanacharoensil & Schuckert, 2016; Wheeler, 1977). Even with its importance, any assessment regarding competition for inbound tourism to Thailand, and particularly within this lucrative backpacker segment, remains largely overlooked.

TOURISM COMPETITORS OF THAILAND

In the face of little empirical research relating to immediate competitors of Thailand as an international backpacker destination, Orient Pacific Century's 2003 survey reported travel agency staff specializing in Asian region travel rated their best alternative countries for Thailand as Singapore, Hong Kong, Bali/Indonesia and Malaysia (cited in Sirisuthikul, 2006). A more recent study in relation to destination image of Thailand and its competitors was conducted by Zins (2014). Focusing on the European inbound markets to Thailand, he dually classified travel experiences and expectations in visiting Thailand through a lens of past visitors and non-visitors. The study found that the majority of the respondents focused solely to Thailand without considering any alternative destinations. In respect to those respondents with past travel experiences in Thailand, Bali as a specific destination in Indonesia overwhelmingly appeared as their top pick as an alternative for Thailand. The remaining non-visitors to Thailand also nominated Bali as number one, but their choice preference was much more closely followed by Vietnam as their second alternative destination against Thailand. In a related study on destination loyalty, McDowall (2010) compared satisfaction between first-time and repeat international tourists through their visits to Bangkok. He found that first-time and repeat visitors expressed different views towards Bangkok as a tourist destination, particularly across the dimensions of "amazing destination", the "hospitality of locals", and the "quality of products and services". In relation to the strengths and weaknesses of Southeast Asian countries as international tourism destinations, Leung and Baloglu (2013) evaluated destination competitiveness of 16 Asia Pacific countries. Specific to the Southeast Asia sub-region, the study found Thailand, along with Malaysia, the Philippines and Vietnam all share a competitive advantage in the dimension of "price", yet Malaysia and Thailand did not rank well at "Information Communications Technology (ICT)" and "cultural resources". Indonesia ranked highly in both "natural and cultural tourism resources" while the Philippines and Vietnam suffered relative competitive disadvantages in "transportation networks (air and ground)", "tourism infrastructure", "ICT", and "natural and cultural resources". Singapore was evaluated as the most competitive destination within dimensions of "good policy and regulations", "affinity for travel", and "prioritization of tourism", whereas it remained relatively weak in "cultural and natural resources".

Though such studies are considered valuable in the destination tourism literature, they provide only limited understanding for Thai policy-makers about the destination countries that are perceived by visitors as the leading competitors for Thailand within the specific tourist market segment of international backpackers. Therefore, the significance of this study is in its examination of the immediate competitors of Thailand as a backpacker destination through the eyes of international backpackers from one of its key source markets - Australia.

RESEARCH METHODOLOGY

Existing studies on destination image have employed both structured and unstructured measurement techniques (Pike, 2002). However, of those studies, structured techniques which predominantly employ a set of semantic differential or Likert type scales were mostly used for assessing destination image (e.g. Ayad & Shujun, 2013; Baloglu & Brinberg, 1997; Haahti, 1986; Milman & Pizam, 1995; Stylidis, Shani, & Belhassen, 2017; Wang & Quyen, 2011). In keeping with those tried and tested methods, this study similarly used Likert scale to assess destination image perceptions of Thailand's competitive destinations. Maintaining the common research approach allows valuable comparisons of image perceptions of the selected destinations against the earlier works.

The structured-survey instrument consisted of three sections: 1) questions related to respondents' socio-demographic characteristics; 2) questions about respondents' backpacking travel experience; and 3) questions that measured perceptions of Thailand's competitors as a backpacking destination. The destination attributes employed in section three were determined through an analysis of the existing literature on destination image perceptions (Henkel et al., 2006; Nuttavuthisit, 2007; Rittichainuwat, Qu, & Brown, 2001), with particular reference to the work of Murphy (1999). Although Murphy's study focused toward Australia as a travel destination its usefulness is in its explicit elicitation of international backpacker perceptions, as is the focus of this paper. In this study of Thailand's competitors as a backpacker destination, respondents were first asked to nominate a country within the Southeast Asia region from a list of eight alternatives, perceived by them as the "best" alternative backpacker destination for Thailand. Data were collected for Singapore, Indonesia, Vietnam, Malaysia, Laos, Cambodia, Myanmar, and Brunei. These destinations were chosen because they are recognized as major and competing tourist destinations for Thailand based on their geographical proximity plus their ease and comparative cost of access within Southeast Asia. In the second stage, respondents were asked to assess their perceptions across 19 tested attributes (see Henkel et al., 2006; Murphy, 1999; Nuttavuthisit, 2007; Rittichainuwat et al., 2001) of the most preferred destination that they nominated. Respondents ranked their perceptions on a 5-point Likert scale of perception attribute statements with 1 = strongly disagree, 2 = disagree, 3 = neutral, 4 = agree, and 5 = strongly agree.

Data collection was via online surveys. Distribution of the survey was facilitated through an international panel provider as the sampling/collection intermediary. This data collection technique is becoming increasing acceptable among researchers (see Chen, Weiler, & Young, 2015; Kim, Chung, & Lee, 2011; Moyle et al., 2017; Quintal, Lee, & Soutar, 2010). It is particularly noted for its ability to access a representative sample from distant locations with increased timeliness. For this study, Survey Sampling International (SSI) was instructed by the author to apply a systematic stratified sampling technique that was driven by the aim of the research to obtain a generalizable sample. To achieve this aim, a stratified sample was aligned to the Australian Standard Geographic Classifications (ASGC), a subsidiary classifier which informs the statistical divisions of Australian Bureau of Statistics census data (Australian Bureau of Statistics, 2015; McLennan, Moyle, Ruhanen, & Ritchie, 2013). This "pairing" of classifications was utilized in order to maximise the potential for generalizability of the research findings across the targeted population of Australia (Bennett & Dearden, 2014).

The survey instrument was pretested through a small convenience sample of PhD and faculty staff located within three Australian Universities across three Australian states. Pre-test data was useful in refining the survey but excluded from the analysis. The analysed data was collected from the invited volunteer respondents representing a sample population of Australian adults aged 18–49 years, representative of mainstream backpacking demographics. The sample size was based on the seminal formula of Yamane (1973) who determined for a confidence level of 95 per cent the sample should not be less than 400 (see also Bryman & Cramer, 2005). Within this filtering framework the self-administered questionnaire was provided online to a random sample of individuals within the SSI pool across February 2016. A total of 565 surveys were collected. Following procedural screening processes that looked for outliers, straight-liners and unrealistic completion times, 491 were eventually deemed valid for analysis. Valid completion time of 7 minutes was determined after evaluation of the pre-test collection phase. In addition, small design alterations were made at that phase to standardise terminology and also reduce straight-liner effects. As the useable questionnaires exceeded 400 the data coding and data analysis proceeded without further requirement, at that time, for further survey distribution, though this is a point the author will return to.

The collected data was analysed via a range of appropriate descriptive (frequencies, percentages, mean, and standard deviation) and inferential statistics. For the descriptive analysis, ANOVA was the technique used to assess image perceptions between destinations – Thailand's competing destinations (Baloglu, 1997; Chen & Hsu, 2000). The Mann-Whitney U test, as an appropriate inferential statistical analysis technique to analyse the quantitative data categorized as nominal and ordinal data scaled variables (Likert scales of agreement) (Barnes & Lewin, 2005; Son, 2005; Sroypetch, 2015; Sroypetch & Caldicott, 2018), is used to detect the differences in the image perceptions between the respondents who exhibited different qualities based on their past or non-experience with backpacking in Thailand. A significant difference is deemed to exist if the significance level (p value) recorded is 0.05 or less.

RESEARCH FINDINGS

Socio-Demographic Characteristics of Australian Respondents

The display at Table 1 indicates a majority of the 491 respondents were female (59.7 per cent), were aged between 18 and 35 years (69.90 per cent), and were holders of an undergraduate degree, or higher, as their education level (49.6 per cent). The finding regarding the education level of the Australian sample is consistent with several other studies which indicate backpackers generally possess an above average education level (Loker-Murphy & Pearce, 1995; Richards & Wilson, 2004a; Riley, 1988; Sroypetch & Caldicott, 2018; Welk, 2004). This factor has been attributed to their mostly middle class status and originating from developed nations. Almost 80 per cent of the respondents were living in Victoria, New South Wales and Queensland respectively which, when stratified, corresponds statistically with the three most populated states of Australia. Approximately one third of respondents had experience(s) in visiting Thailand through backpacking trip(s) leaving two thirds as non-visitors to Thailand.

Table 1: Socio-Demographic Profile of Respondents

Variables	Number	Percent
Gender		
Male	198	40.3
Female	293	59.7
Age		
18–25 yrs	127	25.9
26–35 yrs	216	44.0
36–45 yrs	148	30.1

Table 1: Socio-Demographic Profile of Respondents (Cont.)

Variables	Number	Percent
Highest education		
High school	141	28.7
College diploma/equivalent	106	21.6
Undergraduate degree	171	34.8
Post-graduate degree	68	13.8
Others	5	1.0
Place of residency		
Victoria	151	30.8
New South Wales	149	30.3
Queensland	94	19.1
South Australia	46	9.4
Western Australia	35	7.1
Australian Capital Territory	9	1.8
Tasmania	6	1.2
Northern Territory	1	0.2
Was (Is) Thailand your first choice of destination		
Yes	241	49.1
No	250	50.9
Past backpacking experience in Thailand		
Have no experiences (non-visitors)	345	70.3
Had experiences (past visitors)	146	29.7
Number of backpacking experiences in Thailand		
1 trip (first timers)	92	63.0
More than1 trip (repeaters)	54	37.0

About half of the respondents (49.1 per cent) stated that Thailand was their first destination choice for a backpacking trip in Southeast Asia supporting findings of Orient Pacific Century (cited in Sirisuthikul, 2006) who in 2003 found that just over 50 per cent of respondents recalled Thailand as the first destination in Asia Pacific region. However, with 50.9 per cent of respondents from Australia in 2017 signalling that Thailand was not their first destination of choice for a backpacking holiday it raises the flag for Thailand tourism agencies to more closely scrutinize the views of the Australian market regarding their visitation preferences for destinations in Southeast Asia.

Competitors to Thailand as a Backpacking Destination

The results displayed in Table 2 indicate that of the eight alternative Southeast Asia destinations presented to all 491 respondents Singapore, Indonesia, Vietnam, and Malaysia, respectively are the leading four nation competitors to Thailand for Australian backpackers. Of the 146 respondents who indicated their past visitation to Thailand, the top four alternative destinations for Thailand are Indonesia, Singapore, Vietnam and Malaysia, respectively. Noticeably, Indonesia and Singapore are rated similarly among this past-visitor to Thailand respondent group (26 vs 25.3 per cent). For the remaining 345 non-visitors, the most popular alternative destination for Thailand was Singapore (41.4 per cent) by a healthy three-fold margin. Trailing Singapore were Indonesia, Vietnam, and the Philippines, respectively though with much tighter margins between the latter three destinations.

Table 2: The best alternative destination for Thailand perceived by the Australian market

The best alternative destination of Thailand	Australian citizens (n = 491)		Visitation to Thailand				Previous backpacking experience(s)			
			Non-visitors[1] (n = 345)		Past visitors[2] (n = 146)		First-timers[3] (n = 92)		Repeaters[4] (n = 54)	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Singapore	180	36.7	143	41.4	37	25.3	26	28.3	12	22.2
Indonesia	91	18.5	53	15.4	38	26.0	23	25.0	15	27.8
Vietnam	67	13.6	46	13.3	21	14.4	12	13.0	8	14.8
Malaysia	51	10.4	31	9.0	20	13.7	11	12.0	9	16.7
Philippines	46	9.4	35	10.1	11	7.5	8	8.6	3	5.6
Cambodia	21	4.3	16	4.6	5	3.4	3	3.3	2	3.7
Laos	17	3.5	10	2.9	7	4.8	4	4.3	3	5.6
Myanmar	11	2.2	9	2.6	2	1.4	2	2.2	0	0
Brunei	7	1.4	2	6.0	5	3.4	3	3.3	2	3.7

Drilling further into the data of the 146 backpackers advising past experience with Thailand, the 96 first-timers also selected Singapore as their best alternative destination for Thailand. This was follow by Indonesia, Vietnam, and Malaysia. For the 54 repeaters (multiple experiences backpacking in

[1] Non visitors refer to those who have never been backpacking in Thailand.

[2] Past visitors refer to those who have been backpacking in Thailand.

[3] First-timers refer to those who have once been backpacking in Thailand.

[4] Repeaters refer to those who have been backpacking in Thailand more than once.

Thailand), Indonesia is shown as Thailand's greatest competitor followed by Singapore, Malaysia and Vietnam, respectively.

Based on the above findings, both non-visitors to Thailand and first-time visitors preferred Singapore as their first preference alternate destination for Thailand whereas repeat visitors preferred Indonesia. These findings appear to suggest that the more experiences the respondents have, the more they prefer Indonesia over Singapore as an alternative backpacking destination over Thailand. The findings support the work of Bianchi, Pike, and Lings (2014) which reported, apart from Thailand, the most visited countries in Southeast Asia by Australian residents are Singapore and Indonesia. They also support the work of Zins (2014) who found that international travellers indicated Bali (as a specific destination within Indonesia), or Indonesia major, was their most preferred destination as an alternative choice to Thailand. However, the findings of this study are sufficiently differentiated from those earlier works in that they focus on Thailand's competitors within the specific market segment of backpacker tourism. The next section discusses the Australian respondents' perceptions of Thailand's top four leading competitor countries.

Singapore, Indonesia, Vietnam and Malaysia are ranked by Australians as the top four leading competitors for Thailand as their preferred alternate backpacking destinations. As the full sample of 491 respondents is successively reduced into the sub-set segments of – non-visitors, past visitors, first-timers, and repeaters – the statistical validity for a 95 per cent confidence also diminishes across the smaller subsets. In this regard, the continuing analysis is contained to perceptions based solely on images of Thailand, against its competitors, through the lens of non-visitors ($n = 345$) and past visitors ($n = 146$) only.

Table 3 presents attributes of the four greatest competitor destinations for Thailand as perceived significantly different between non-visitors and past visitors to Thailand. Overall, non-visitors and past visitors held similarly perceptions towards Singapore, Indonesia, Vietnam and Malaysia across all nineteen destination perception attributes employed in this study. However, there are measurably different attributes nominated against each competitor nation that were perceived as significantly different between the two respondent groups of non-visitors and visitors.

In regards to Singapore, the findings indicate that past visitors to Thailand that ranked Singapore as their best alternative for Thailand are more positive towards the attributes of "simple immigration procedures" and "a low availability to drugs" than those perceived by non-visitors. In contrast, the attribute of "good quality accommodations" is perceived less favourably by the past visitors when compared to their non-visitors counterparts. For those who ranked Indonesia as their first alternative choice for Thailand, non-visitors are more negative towards all four attributes of "a safe travel record", "efficient public transportation", "a low availability to drugs", and "a low availability to sex tourism", than past visitors. In the cases among the respondents where Vietnam was chosen as their best alternative destination, past visitors were more positive towards the dimension of "few language barriers" than were non-visitors.

Table 3: Perceptions of non-visitors and past visitors towards Thailand's immediate competitors as a backpacking destination

Perceptions of Thailand's four greatest competitor backpacking destinations within Southeast Asia for the Australian market	Singapore			Indonesia			Vietnam			Malaysia		
	Past Visitors (n=37)	Non Visitors (n=143)		Past Visitors (n=38)	Non Visitors (n=53)		Past Visitors (n=21)	Non Visitors (n=46)		Past Visitors (n=20)	Non Visitors (n=31)	
	Mean	Mean	Sig.	Mean	Mean	Sig.	Mean	Mean	Sig.	Mean	Mean	Sig.
Interesting customs and culture	3.81	3.86	.67	3.95	3.85	.60	4.14	4.17	.76	3.90	4.16	.12
A variety of natural attractions	3.89	3.90	.74	3.92	3.84	.79	4.14	4.17	.92	3.80	4.06	.24
A variety of historical attractions	4.03	3.82	.20	4.08	3.74	.84	4.10	4.17	.58	3.90	3.87	.97
A variety of cultural attractions	4.00	3.91	.59	4.11	3.92	.42	4.10	4.11	.71	4.00	4.03	.79
A variety of recreational activities	4.08	4.05	.67	4.24	4.02	.35	3.95	3.89	.96	3.90	3.97	.56
A variety of adventurous activities	3.84	3.85	.91	4.03	3.98	.97	3.81	3.89	.54	3.80	3.71	.90
A variety of nightlife entertainment	3.84	3.93	.35	4.00	3.75	.24	3.67	3.65	.91	3.90	3.77	.60
Cheap travel cost	3.57	3.56	.88	4.08	3.92	.49	3.90	4.07	.50	4.00	3.74	.24
Few language barriers	4.03	3.84	.35	3.82	3.53	.17	3.86	3.11	.00	3.90	3.39	.10
A safe travel record	4.16	4.13	.95	3.95	3.38	.01	3.71	3.61	.68	3.75	3.61	.57
Efficient public transportation	4.03	4.06	.98	3.95	3.34	.00	3.43	3.33	.56	3.80	3.58	.41
Good quality accommodations	3.97	4.24	.04	4.00	3.77	.27	3.76	3.50	.14	3.90	3.87	.80
A variety of cuisines	3.92	4.09	.12	4.05	3.98	.63	3.76	3.61	.64	3.85	4.00	.57
Good bargain shopping	3.73	3.81	.49	3.84	4.11	.11	4.05	3.93	.75	3.90	3.71	.41
A low availability to drugs	3.95	3.58	.04	3.74	2.98	.00	3.33	3.09	.44	3.75	3.16	.03
A low availability to sex tourism	3.81	3.45	.06	3.71	3.17	.02	3.14	3.02	.79	3.80	3.00	.01
Friendly locals	3.89	3.91	.85	3.84	3.94	.42	3.90	3.87	.88	4.00	3.87	.63
Simple immigration procedures	3.92	3.63	.02	3.74	3.72	.95	3.76	3.37	.08	3.85	3.58	.39
High standards for sanitation and cleanliness	4.27	4.18	.90	3.68	3.49	.44	3.38	3.13	.38	4.00	3.39	.02

Mean score calculated from a five-point scale (1= strongly disagree, 5 = strongly agree), Significance level at .05

Where respondents choose Malaysia as their best alternative destination for Thailand, past visitors were more positive towards the perception dimensions of "low availability to drugs", "low availability to sex tourism" and "high standards for sanitation and cleanliness" than were non-visitors.

These findings appear to suggest that past visitors, who are more experienced backpackers, are more positive than non-visitors towards most of the destination dimension attributes where perceptions were deemed significantly different between the two respondent groups. These findings support previous literature which notes that direct experience with a destination tends to create a more positive perception of a destination's image (Akhoondnejad, 2015; Ali et al., 2016; Milman & Pizam, 1995; Ryan & Cave, 2005; Tavitiyaman & Qu, 2013).

Table 4 represents the strengths and weaknesses of the top four immediate competitors of Thailand as a backpacking destination as perceived by the Australian market. The results indicate that Singapore's main strengths are its high standards for sanitation and cleanliness, good quality accommodations provision and safe travel records. The finding support the work of the Malaysian Tourism Promotion Board 1998 (cited in Sirisuthikul, 2006) which reported that Singapore was perceived as clean, modern, and safe. Additionally, Singapore was perceived as having low accessibility to sex tourism and drugs but it did suffer from perceptions of having high travel costs. In comparison, Indonesia's main strengths appear to be the variety of recreational activities and cuisines and good bargain shopping.

Vietnam appeared strong in the aspects of offering a variety of natural and historical attractions and its interesting customs and culture. However, it would appear that both Indonesia and Vietnam need to work on the negatively perceived attributes of high availability to drugs, sex tourism and their lower standards for sanitation and cleanliness. Malaysia was positively perceived as a destination providing interesting customs and culture plus high diversity of cultural and natural attractions. In contrast, Malaysia was negatively perceived for its dimensions of availability to sex tourism and drugs with additional negative perceptions over communication (language) barriers. Noticeably, the issue of high availability of sex tourism and drugs were commonly perceived by the respondents as the downside components of those destinations. From these results it would seem that these issues have not been taken seriously by those national governments (see Bui, 2011; Crotti & Misrahi, 2015; Tuan et al., 2004).

Based on this study's findings, Singapore's main strengths are distinct, particularly within the Australian market, as Singapore offers basic standards for international travel demands across the dimensions of 'cleanliness and hygiene', 'safety', and 'quality accommodation'. These features are reciprocally evidenced as the common dimensions perceived by international travellers of Australia as a tourist destination (Dwyer, Livaic, & Mellor, 2003).

Table 4: The strengths and weaknesses of Thailand's immediate competitor destinations within Southeast Asia perceived by Australian citizens

The strengths of destination	Perception		The weaknesses of destination	Perception	
	Mean	SD		Mean	SD
Singapore (n=180)					
1. High standards for sanitation and cleanliness	4.20	.815	1. A low availability to sex tourism	3.52	1.049
2. Good quality accommodations	4.19	.707	2. Cheap travel cost	3.56	.961
3. A safe travel record	4.14	.824	3. A low availability to drugs	3.66	1.043
4. A variety of cuisines	4.06	.775	4. Simple immigration procedures	3.69	.894
5. A variety of recreational activities	4.06	.641	5. Good bargain shopping	3.79	1.013
Indonesia (n=91)					
1. A variety of recreational activities	4.11	.849	1. A low availability to drugs	3.30	1.090
2. A variety of cuisines	4.01	.767	2. A low availability to sex tourism	3.40	1.031
3. Good bargain shopping	4.00	.931	3. High standards for sanitation and cleanliness	3.57	.990
4. A variety of cultural attractions	4.00	.856	4. Efficient public transportation	3.59	.919
5. A variety of adventurous activities	4.00	.856	5. A safe travel record	3.62	.975
Vietnam (n=67)					
1. A variety of natural attractions	4.16	.809	1. A low availability to sex tourism	3.06	1.057
2. Interesting customs and culture	4.16	.730	2. A low availability to drugs	3.16	1.053
3. A variety of historical attractions	4.15	.783	3. High standards for sanitation and cleanliness	3.21	1.008
4. A variety of cultural attractions	4.10	.855	4. Few language barriers	3.34	.946
5. Cheap travel cost	4.01	.728	5. Efficient public transportation	3.36	.732

Table 4: The strengths and weaknesses of Thailand's immediate competitor destinations within Southeast Asia perceived by Australian citizens (Cont.)

The strengths of destination	Perception		The weaknesses of destination	Perception	
	Mean	SD		Mean	SD
Malaysia (n=51)					
1. Interesting customs and culture	4.06	.676	1. A low availability to sex tourism	3.31	1.049
2. A variety of cultural attractions	4.02	.761	2. A low availability to drugs	3.39	.961
3. A variety of natural attractions	3.96	.799	3. Few language barriers	3.59	1.043
4. A variety of cuisines	3.94	.904	4. High standards for sanitation and cleanliness	3.63	.894
5. A variety of recreational activities	3.94	.732	5. A safe travel record	3.67	1.013

1= strongly disagree; 5 = strongly agree

DISCUSSION AND CONCLUSIONS

This paper evaluated the perceived images of eight immediate competitors for Thailand as an international backpacker destination within Southeast Asia by the Australian market. Thailand's top four competitor nations were identified as Singapore, Indonesia, Vietnam and Malaysia when assessing the perceptions of both visitors and non-visitors (Chen & Uysal, 2002; Crouch & Ritchie, 2000; Dwyer et al., 2000; Gomezelj & Mihalič, 2008). The respondents' perceptions concerning Thailand's competitors are also further differentiated between first time visitors and repeaters. For past visitors and repeaters, Indonesia holds the greatest appeal as best alternative for Thailand as a backpacking destination. In contrast, for non-visitors and first-timers, Singapore ranks as the best alternative destination for Thailand. The finding support the existing literature to the extent that familiarity (previous visitation experiences) with a destination influence the views of visitors towards their perceptions, conceptualisation and measurement of destination image (Akhoondnejad, 2015; Baloglu & McCleary, 1999b; Tavitiyaman & Qu, 2013; Wang & Hsu, 2010). However, the respondents who differ based on their experiences with Thailand (non-visitors versus past visitors) particularly expressed different views regarding their perceptions of the immediate competitors of Thailand.

By examining images of the immediate competitors of Thailand, this study identified each nation's competitive strengths and weaknesses as backpacking destinations through images held by Australian travel consumers as benchmarked against Thailand. Within the Australian market, Thailand needs to combat the strongly held perceptions of Singapore currently distinguished from the other destinations. Singapore is particularly positioned as a contemporary and safe destination. However, Singapore will also need to attack its competitors by offering tourism related price discounts to customers through the Australian travel media in efforts to re-position itself as a "good value" destination. Indonesia is positioned as providing great food in an active destination with diversity of tourism experience, while Malaysia's position is as a multi-cultural destination. Vietnam, on the other hand, captures the position of an unspoiled and relaxing destination.

The new knowledge emanating from this study can effectively assist the concerned tourism policy-advisors and destination marketers to form favourable images of their own destination while distinguishing themselves from their competitors. The practical implications of this study are therefore of great importance in providing useful recommendations for policy advisors and destination marketers in developing contemporary marketing and communication strategies. To be more specific, the findings can aid the policymakers in Thailand to make more effort to overcome their perceived negative attributes, particularly sex and drugs related issues as well as cleanliness and sanitation. Further, the destination marketers can take benefit from learnings of this study by increasing the projection of positively perceived images of their destination, particularly those considered by visitors as their unique selling attributes (Wang and Quyen, 2011). The findings can also assist independent tour operators or travel agents who trade in these Southeast Asian and Oceanic destinations. They can discerningly develop communication strategies broadly targeting all Western customers but also specific communications focused to the Australian market in particular. Finally, destinations can examine their campaign evaluations for both prospective visitor and past visitor market-segments to further differentiate their positioning and promotional strategies for each segment. Based on the findings, both groups are likely to have unique preferences regarding the destination choices and unique image perceptions towards specific attributes of backpacking destinations in Southeast Asia. Tourism Ministry marketers can also align more "realistically" images that visitors and non-visitors hold in determining how to best improve Thailand's tourism image through the attractions, products and services offered.

This body of knowledge, specific to backpacking tourism, is important as firstly, it has been largely overlooked by Thai tourism policy advisors and marketing practitioners, and secondly, discounted by tourism scholars. This paper contributes to the destination image literature as it engages with methods that profile how backpackers perceive destinations against their competitors; a field of research that has been underexplored. This paper also provides the new insights regarding Thailand's destination competitors and the image perceptions of those competitors in specific to backpacker tourism. The deeper understanding of Thailand's immediate competitors revealed through this study can assist Thai tourism marketers to identify with their country's competitive strengths and weaknesses benchmarked against their immediate competitors. Such insight can assist in the development effective marketing plans and strategies to attract Western international travellers generally to Thailand and the Australian backpacker market particularly (Chen & Uysal, 2002; Crouch & Ritchie, 2000; Dwyer et al., 2000; Gomezelj & Mihalič, 2008).

Future research will benefit from the collection of a larger sample in order to allow perception comparisons between all of the four different subsets of the targeted population. Samples of First-timers (n=92) and Repeater (n=54) within this study were deemed insufficient to analyse beyond their descriptive measures. Despite this limitation, methodologically, the paper channels the effectiveness of the growing phenomenon toward engaging panel providers to recruit respondents. This study demonstrates the effectiveness of this method as the next generation of data collection, particularly for researchers wishing to access distant respondents – distant within their home nation or distant across the world. It proved within this study as extremely effective for both timeliness of achieving voluminous respondent replies aligned with destination nation census divisions. Such is the flexibility, and power, of the collection tool. At the time of writing this option was still being negotiated. On reflection, and bearing in mind the cost/benefits of such an exercise, it is deemed that such an extension would not bring any further material effect in meeting the broad aims of the study.

Nevertheless, the significant finding of this paper is that past visitors appear to have a different view regarding their perceptions of the immediate competitors of Thailand as opposed to non-visitors. This provides a valuable finding regarding the Australian backpackers' perceptions of the direct competitors of Thailand as a backpacking destination within Southeast Asia. However, due to the small past visitors sub-sample within this study, this aspect is worthy of further exploration. As such, a study with a larger sample size in the same setting would be useful to confirm the current finding.

Finally, additional study is needed to examine the immediate competitors of Thailand in relation to different world sub-regions – the Americas and Europe as existing markets but also the sub-continents of India and China as global powerhouses in emerging travel markets. This will assist the Tourism Authority of Thailand (the destination marketing organization) to design favourable communication strategies tailored directly to non-visitors of specific sub-continent markets and then further to first-timers and repeater travellers from those individual markets.

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