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Kristina Sommer

IUBH Internationale Hochschule

Main Campus: Erfurt

Juri-Gagarin-Ring 152

99084 Erfurt

Telefon: +49 421.166985.23

Fax: +49 2224.9605.115

Kontakt/Contact: [k.janson@iubh.de/](mailto:k.janson@iubh.de)

Autorenkontakt/Contact to the author(s):

Prof. Dr. Kristina Sommer

IUBH Internationale Hochschule · IUBH Fernstudium

Kaiserplatz 1 · D-83435 Bad Reichenhall

Email: kr.sommer@iubh-fernstudium.de

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Holidays at home - Camping and Glamping as a part of domestic tourism

An overview and analysis of camping (and in particular luxury camping) as an alternative form of domestic tourism in the time of the coronavirus.

Kristina Sommer

Abstract:

Camping is a part of the outdoor hospitality industry. It is a popular activity and an emerging tourism sector in Europe. Camping has changed from being a cheap form of travel to a real outdoor experience. Travelling with a tent is popular, but recreation vehicles and caravans have become an increasingly important area of focus. The demand for more luxurious and larger caravans is growing. Camping grounds must now deal with the new demands of their customers, who wish to have more comfortable and luxurious options. It is no longer enough to just provide washing and cooking facilities. The demand for wellness and sports facilities, once found primarily in the hotel industry, is now increasing at camping sites. This trend is called “glamping” – a portmanteau of the words “glamorous” and “camping”. As the name suggests, comfort and luxury are the essential characteristics of glamping. Glamping combines an outdoor experience with the comfort of a hotel and is a new segment in the camping tourism industry. The coronavirus crisis in particular has shown that camping and glamping are alternative types of domestic tourism which could provide a chance to generate new customer segments.

Keywords: Camping, Glamping, Domestic Tourism, Camping Ground, Camping Tourism, Nature-Based Tourism, Outdoor Hospitality Industry

JEL classification: Z31

1 Introduction and background

Despite cautious border re-openings, tourists are likely to spend most of their holidays in their home countries. According to FVW, a German tourism magazine, in Germany people are planning domestic trips instead of foreign holidays. A survey found that 30 % of Germans want to travel. For their holidays they prefer Germany. It was the top destination in the survey (Needham, 2020).

This example makes clear the importance of domestic tourism for the tourism year 2020. One variation on domestic travel is the camping holiday. Camping is no longer considered old-fashioned, boring, or uncomfortable — in fact the outdoor hospitality sector (which includes camping grounds) “has emerged from a low-cost tourism niche to a mainstream, versatile recreation experience, valued at different levels by different segments” (Brooker and Joppe, 2013, p. 1).

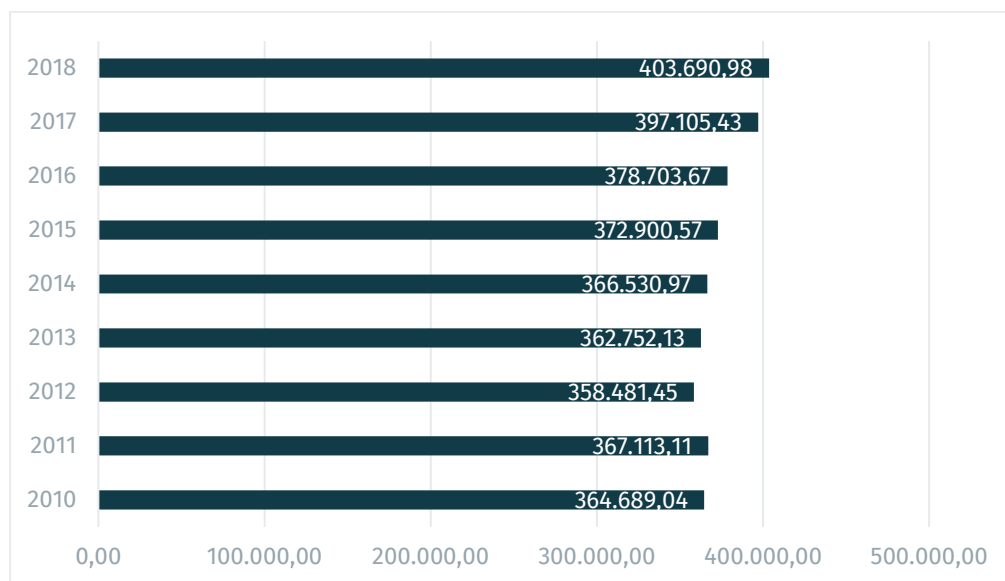
As the coronavirus crisis causes a shift in focus to taking holidays in one's own country, camping is becoming increasingly popular. Travel abroad is not feasible for most people now, and no one can estimate when unrestricted travel will be possible again. The German Competence Centre for Tourism expects an upturn in domestic tourism in Germany from July 2020 onwards, but a more realistic rise is not expected until October 2020 (destinet, 2020). Therefore it is worth taking a closer look at the development of the domestic tourism sector.

One part of this sector is camping tourism. No one can predict how demand will develop, but even before the crisis there was an observable change in camping tourism, including a growing demand for larger and more luxurious campers and recreation vehicles (Jankowski, 2015). The economic impact of camping can be seen in a 2015 study by the German Caravanning Industry Association, which reported that in 2013 the tourism camping industry generated 18.3 billion euros in fifteen European countries¹ (CIVD, 2015). It remains to be seen how the market will respond to the coronavirus crisis.

The camping industry is measured not just by sales of camping vehicles and equipment — one must consider the number of camping grounds in Europe and their individual offers as well. However, little research has been done in this field.

Overnight stays on camping grounds are rising (see Figure 1). In Europe there were about 27,960 camping grounds registered in the year 2018 (Eurostat, 2020b) and visitors spent a total of 397 million nights there (Eurostat, 2020a). Two adults with a ten-year-old child paid an average of 35.70 euros for an overnight stay at an European medium-category camping ground in the 2017 peak summer season (ADAC, 2017). In 2019 the most expensive destination was Italy. Here the average price for an overnight stay on a campsite was 48.35 euros. Sweden was the cheapest at 31.46 euros. Among European destinations there have been price increases of 4 to 5 % in some cases compared to 2018 (ADAC, n.d.). It is necessary to wait and see how overnight prices will change if there is mainly domestic demand.

¹ Austria, Belgium, Denmark, Finland, France, Germany, Italy, Netherlands, Norway, Portugal, Slovenia, Spain, Sweden, Switzerland, United Kingdom



2010, 2011, 2014, 2017, 2018: estimated; 2012: break in time series

Figure 1: Overnight stays at camp grounds in the European Union from 2013 until 2018 (Eurostat, 2020c)

There has been observable change over the last few years in the camping industry. Camping has become more comfortable. For example, new caravans can include a dishwasher or a garage for a motor scooter. The days of simplicity appear to be over. Even tents have become more comfortable, transforming into elegant palaces with comfortable beds. This convenient style of outdoor hospitality is called "glamping".

This article will provide a brief exploration of the basics of camping tourism as part of the hospitality industry, with an emphasis on the development of glamping tourism. The focus is on the following question: Is glamping just an inventive vocabulary or is there a real change in camping tourism? And if it is a new kind of segment in camping tourism, can it be important for domestic tourism?

By analysing relevant academic literature focused on the camping sector, this paper will identify research on glamping and describe the main findings. It will also present aspects of possible future research. The direct influence that the crisis will have on glamping cannot yet be analysed, so instead the most recent state of affairs before the crisis will be examined.

Before approaching the answer to the research question and discussing the topic of glamping, the terms camping, camping grounds, and camper should first be examined in more detail.

2 Camping as a part of the outdoor hospitality sector

2.1 What is Camping?

Although camping is a common term, not much has been researched in this area. According to Hardy, Gretzel, and Hanson (2013), campers who use a recreation vehicle have a "desire for freedom, flexibility, lifestyle change, fluidity in membership, a desire to self-actualise, [and] the abandonment of social structures" (Hardy et al., 2013, p. 48). Is that what camping is about? Brooker and Joppe (2013) point out that "Camping is a form of outdoor recreation that is part activity and part accommodation. It has evolved from basic tenting to now include caravanning, recreation vehicles (RV), and luxury offerings." (Brooker and Joppe, 2013, p. 1). For campers a stay in the nature is important, which is why camping tourism can be defined as a form of nature-based special interest tourism (Mikulić et al., 2017, p. 226).

People have always spent time in nature. They slept in tents, covered wagons, or under the open sky. But when did modern camping begin? Thomas Hiram Holding, a tailor from London who was enthusiastic about camping, is considered the founder of modern camping. The Camping and Caravanning Club, which Holding founded in 1901 as the Association of Cycle Campers, recalls that Holding's passion for camping was awakened in 1853 when, at the age of nine, he crossed the American prairie with his parents in a covered wagon train. As an adult he explored the Scottish Highlands and Ireland by tent and canoe or bicycle. Holding wrote a book about this experience at the end of the 19th century, which was published under the title "Cycle and Camp in Connemara" (The Camping and Caravanning Club, 2016).

The first kinds of caravans were manufactured in Great Britain at the end of the 19th century and were drawn by horses. Although travelling showmen took to the road in all sorts of horse-drawn caravans, it is generally accepted that the first leisure caravan was Dr. W. Gordon-Stables' caravan, called "Wanderer" (Historic Caravan Club, 2014). This caravan was a very luxurious, two axle vehicle.

In the year 1907 the original Caravan Club was founded. Motor caravans replaced horse-drawn caravans around 1915. The first Eccles trailer caravan — a very primitive cabin on wheels — appeared in 1919 (Historic Caravan Club, 2014).

In the 1960s there began to exist an increased demand for caravanning. Motorways were built, which permitted longer journeys. Peoples' desire to have new experiences led to an increase in caravanning in Great Britain. This was stopped by the oil crisis in the 1970s (Ferry, 2019). But the situation changed again as incomes have risen in real terms in recent years —now many car owners are able to afford something that has been a very exclusive hobby in recent years (Historic Caravan Club, 2014).

These days camping is transforming from a niche to a mainstream tourism product (Mikulić *et al.*, 2017, p. 227). Being close to nature in a sustainable way with tent or a caravan is popular. The range of camping accommodations is large. Unlike other types of accommodation, tourists can bring their own accommodation with them when camping, while the camping ground provides the space and infrastructure. Camping as a type of accommodation offers many different levels, and everyone will find a suitable style or comfort (Andrey *et al.*, 2014, pp. 2–3).

The following figure provides an overview of the various types of camping accommodations:

Tent	Caravan	Motor Homes	Mobile stable accommodations	Non-mobile stable accommodations
<ul style="list-style-type: none"> • Tent • Rooftop Tent • Tent Trailer • Others like Sleeping Beach Chair 	<ul style="list-style-type: none"> • Caravan • Folding Caravan 	<ul style="list-style-type: none"> • Motor Caravan or Recreation Vehicles (RV) • Car Camping 	<ul style="list-style-type: none"> • Caravan • Tiny House • House Boat 	<ul style="list-style-type: none"> • Chalet • Lodge • Cabin • Camping Barrel

Figure 2: Types of camping accommodation (Sommer, 2019)

Most European campers use a caravan or recreation vehicle. A study from the ACSI says that campers from France (53 %), Italy (57 %), and Great Britain (46 %) prefer recreation vehicles, while campers from the Netherlands (57 %) and from Spain (45 %) prefer caravans. Campers from Germany enjoy both the standard caravan (46 %) and recreation vehicle (43 %). Tents are not anyone's favourite kind of camping. Only a minority of campers from Great Britain (20 %), Spain (23 %), and Italy (21 %) like to use a tent for camping. (ACSI Publishing, 2019)

A distinction can be made between mobile-but-stable accommodation and the non-mobile stable accommodation. The mobile-but-stable accommodation includes accommodation without its own motorization, such as caravans, tiny houses with axle and wheels, or house boats that can be moved. The non-mobile stable accommodation includes permanently installed accommodation such as chalets or lodges. The non-mobile stable accommodation is offered for rent on camping grounds. This type of accommodation should not be considered further.

According to the European Caravan Federation (ECF), the number of caravan and recreation vehicle sales rose to 131,866 in the period from January to June 2019. This is an increase of 3.1 % compared to the same period last year (European Caravan Federation, 2019a).

Most new registrations from January to June 2019 were in Germany, France and Great Britain. In the area of caravans, there was a 10.3 % increase in registrations in Germany, while in the area of recreation vehicles there was a 14.1 % increase in registrations (European Caravan Federation, 2019b).

In summary, it can be observed that there are different types of camping accommodation. The most common types are the caravan and the recreation vehicle. The demand for these types of accommodation is increasing, which can be seen from the increase in sales and registration figures.

2.2 Camping grounds

People who go camping often want to experience nature. In many countries, however, you are not allowed to pitch a tent or park your caravan in the wilderness, which means there is usually only a camping ground left.

A common definition of the word “camping ground” or “camping site” does not exist. According to Hogue (2011) camping grounds can be defined as a “self-sufficient territory *independent of its natural surroundings*” (Hogue, 2011).

Blichfeld and Mikkelsen (2016) write that camping grounds are usually placed in a nice surrounding in nature accompanied by commercial sites like a cafeteria or a restaurant and playgrounds or pools. But there are also simple camping grounds which only offer electricity and running water for their guests (Blichfeldt and Mikkelsen, 2016, p. 123).

The roots of camping grounds are simple. The first public camping grounds in the United States “were nothing more than large, dedicated clearings, free of trees, within which to concentrate groups of tourists” (Hogue, 2011). In the year 1861 the first camping ground was created. The Gunnery Camp was founded in the wilderness of Connecticut (Adams, n.d.). The first commercial camping ground in the world opened in 1894 and was near Douglas, Isle of Man (Taylor, 2016, p. 1).

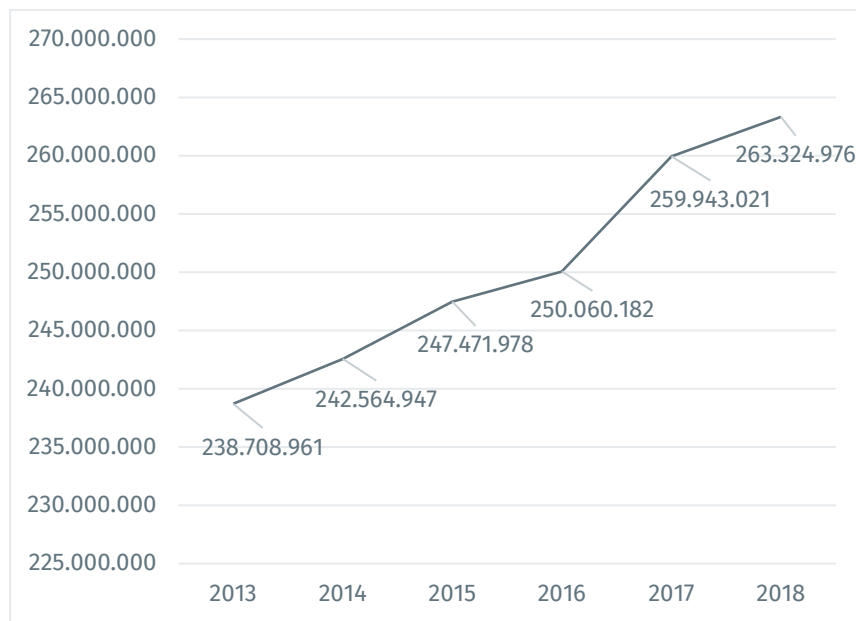
Nowadays there are many types of camping grounds with different orientations, whether it is a leisure paradise with a pool landscape or a direct location by the fjord with its own boat landing stage for fisherman. There is something for everyone. Like hotels, they have classification systems that show what level of comfort and facilities they have (Andrey *et al.*, 2014, p. 4).

Camping grounds are used for both permanent and holiday camping (Eurostats, 2019). The market can be divided into the following areas:

- Camping grounds
- Caravan parks or recreation vehicle parks
- Trailer parks or holiday parks

Although camping grounds are mainly independent companies, there are more and more examples of franchise companies or voluntary chains like Huttopia in France (Andrey *et al.*, 2014, p. 4).

The demand for overnight stays at camping grounds is increasing. Over 260 million overnight stays were recorded at campsites in the European Union in the year 2018. Over the last five years, a 10 % increase in the number of overnight stays has been observed (see figure 3).



2014,2017: estimated

Figure 3: Nights spent at camping grounds, recreation-vehicle-parks, and trailer parks in the European Union before the coronavirus crisis (Eurostat, 2019)

The increase in demand can also have a negative impact. The literature discusses the effect of camping grounds on nature. According to Eagles, McCool and Haynes (2002) “facilities associated with camping in wilderness and backcountry situations should be as simple as possible, appropriate to the level of use, and appropriate to the degree of allowable impact”. All facilities “should follow principles of environmentally sensitive design” (Eagles *et al.*, 2002, p. 68).

In Germany an institution called ECOCAMPING was founded. This organisation focuses on the implementation of sustainable camping. For this purpose it has developed an environmental and quality management system for campsites. It also offers training for entrepreneurs and employees on the topic at the campsites. Currently 225 campsites in Germany, Austria, Italy, Croatia and Slovenia are members of ECOCAMPING (ECOCAMPING, n.d.).

Lübbert (2019) explains in her essay “Nachhaltiges Camping: Einfach draußen” (Sustainable Camping: Simply Outdoors) that there are many ways in which campsites can be made more sustainable. According to Lübbert these include “solar power, energy-saving heating systems, better insulation, waste disposal, and natural design — like sand roads instead of asphalt and wood instead of concrete” (Lübbert, 2019).

For Lucivero (2012) a camping ground offers the opportunity to use concepts of sustainability and flexibility. Camping grounds in areas of ecological importance that rely on seasonal tourism can help to preserve the ecological and scenic value of the area. If the campsite permits only mobile structures (tents, caravans, or motor homes) rather than permanent facilities, it's possible for nature to recover in their absence during the off-season (Lucivero, 2012, p. 2).

According to Blichfeldt and Mikkelsen (2016) the camping ground is “a bounded area” and “a field for sociability and vacability” (Blichfeldt and Mikkelsen, 2016, p. 123). Sociability is the ability to be social during the holidays and interact well with other people (Blichfeldt and Mikkelsen, 2013, p. 1). Vacability means the ability to be vacant from experience and free from everyday life context (Blichfeldt and Mikkelsen, 2013, p. 21).

A study among local tourists at a camping ground in Denmark revealed that the respondents are aware that the camping ground is a place which they actively occupy and transform into a field for socializing and freedom of movement. In this way, the camping ground becomes a place where these tourists construct and live an identity

as sociable and open people "free from experiences" that they cannot perceive in the context of their everyday life, nor, as the results of the study show, in the context of other types of holidays (Blichfeldt and Mikkelsen, 2013, pp. 21–22).

In summary, it can be said that there are different types of camping grounds and the number of stays is growing. Camping grounds enable the development of social structures that exist outside of the everyday life of the campers. It is a kind of freedom for the campers. The precise motivation and reasons for camping are discussed in the next section.

2.3 Campers - Why do people go camping?

There are different types of campers. They can be distinguished according to the length of stay at the camping ground or motivation for camping. First of all, the different types of campers should be considered on the basis of the length of stay at a camping ground. Brooker and Joppe (2013) distinguish between three primary types of camping and outdoor hospitality: permanent, long-term and short-term.

Residents live the whole year (permanent) in caravans or recreation vehicles and they stay at a camping ground. Travellers also live permanently in a caravan or recreation vehicle, but they move around from site to site (Brooker and Joppe, 2013, p. 2). Long-term means habitation on a seasonal basis. In contrast to those who stay permanently, they have a home and travel long distances with their caravan or recreation vehicle for the purpose of seeking out warmer weather or work. But they always return to their home after a period of time (Brooker and Joppe, 2013, p. 3).

Short-term campers are vacationers. They enjoy outdoor experiences on weekends or during vacations (Brooker and Joppe, 2013, p. 3). The focus in this text is on short-term campers with a caravan or recreation vehicle who are on vacation and want to spend their time close to nature.

Now the different types of campers will be examined according to their motivation for camping. Andrey et al. (2004) point out that three motives for camping can be identified: social contact, freedom, and reconnecting with nature (Andrey *et al.*, 2014, p. 2).

In an article in *The Guardian*, camping is described as a fun activity with an adventure character, but which can also be very boring (Dowling, 2010).

Camping also impacts a person's mental state. For campers, time spent at the campsite is a time to relax and have a stress-free time (Houghton, 2018).

In summary, the following primary motives for camping can be identified:

1. Social contact
2. Freedom
3. Reconnection with nature
4. Fun and adventure
5. Stress reduction

When considering motivation, the focus was on the adults' point of view, but how is camping perceived by children? A study by the University of Plymouth Institute of Education and the Camping and Caravanning Club showed that children who camp with their parents are healthier, happier and better at school. 98 % of the parents interviewed for the study said that their children have a greater connection to nature. 95 % of the respondents thought that their children are happier when camping (University of Plymouth, 2015).

The children who took part in the study said that they like the following facts about camping (University of Plymouth, 2015):

1. Making and meeting new friends
2. Having fun
3. Playing outside
4. Learning camping skills
5. Camping's value for curriculum subjects
6. Value for problem solving
7. Learning how to work together

Social contact, adventure and connection to nature also seems to be important for children in the context of camping. These factors could therefore be regarded as the main motivations for camping.

3 Glamping as a new type of camping

3.1 What is Glamping?

There is no common scientific definition of the term “glamping”. According to the dictionary, glamping can basically defined as "a type of camping that is more comfortable and luxurious than traditional camping. The word is a mixture of 'glamorous' and 'camping'" (Cambridge Dictionary, n.d.). “Glamping is a new trend in outdoor tourism that combines luxury and nature, comfort and respect for the environment, and provides exclusivity and uniqueness in offering an accommodation ‘outside the box’, both literally and figuratively” (Andrey *et al.*, 2014, p. 5). To most experts, glamping consists of particularly luxurious or at least innovative rental accommodation at campsites, often combined with upscale service and embedded in an attractive ambience. It is therefore a nature and camping experience with luxury and comfort at the same time (Walter *et al.*, 2019, pp. 314–315). In summary, it can be said that glamping combines a luxurious kind of camping with the experience of nature.

Boscoboinik and Bourquard (2012) discuss the disconnect between glamping and rural tourism: “Glamping [...] could be considered a special type of rural tourism, because it focuses on landscape and natural environment, but its objective is not always sharing the peasants’ life, the peasants’ table, or the peasants’ house. Under its different forms and arrangements, it depicts a new exploitation of land and landscape.” (Boscoboinik and Bourquard, 2012, p. 157).

Glamping is a new kind of accommodation which is often combined with special locations in a rural surrounding far away from crowds of tourists. The accommodations offer a high level of comfort and service often accompanied by activities like safaris or hiking. When it comes to glamping, the type of accommodation is more important than the actual location. It is important to sleep in an unusual place. As well, activities are generally of a high standard (Boscoboinik and Bourquard, 2012, p. 158).

As described by Boscoboinik and Bourquard (2012), the glamping concept is flexible. It can be adapted to different realities, landscapes and budgets (Boscoboinik and Bourquard, 2012, p. 159). It’s important to recognize that the general idea of glamping is to combine holidays, comfort and respect for the environment (Boscoboinik and Bourquard, 2012, p. 159). Leci Sakáčová (2013) posits that “the central thought of glamping always merges comfort with extraordinary places” (Leci Sakáčová, 2013, p. 24).

The people who go glamping are called glampers. According to Leci Sakáčová (2013) there are two main groups of glampers: resort glampers and caravan glampers.

Caravan glampers use their own caravans for travelling and want to be close to nature, but with the comfort of living to which they are accustomed. Resort glampers want that too, but they stay at glamping resorts instead of using their own caravan. They want to relax and experience interesting activities, but also enjoy privacy. Caravan glampers have the same goals, but for them independence and creativity is also important (Leci Sakáčová, 2013, p. 72).

A key indicator as to the rising interest in glamping is the popularity of the word as a search term on Google. Germany is considered more closely as an exemplary region. The following graph shows how often the word “glamping” was googled in Germany over the last ten years.

The graph shows how often a term in the selected region was searched for on Google in the respective period. The value 100 stands for a very popular search term. A value of 0 would mean that the term was searched so little that there is not enough data.

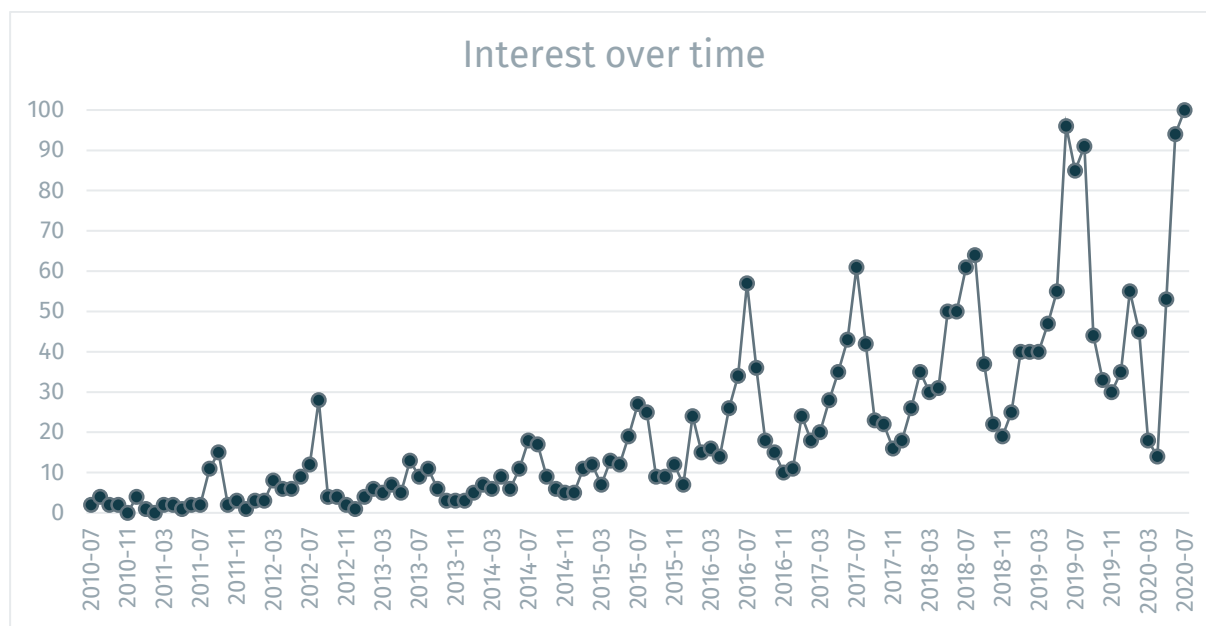


Figure 4: Interest in the term glamping in Germany from July 2019 to July 2020 – Average value per week (Google, 2020)

After a peak in the summer of last year and a significant decrease in the spring, which could be attributed to the corona crisis, since June the interest in the search term “glamping” is increasing in the context of the use of Google in Germany.

A study of the travel behaviour by the market research institute Appinio has shown that most of those questioned in Germany cannot imagine a short-term vacation – even if travel is permitted again. In fact, 20 % cannot even imagine a vacation until after March 2021. 12 % would not even consider going on vacation again until after December 2021. Most of the respondents can imagine domestic tourism in particular. 68 % favour Germany as the safest travel destination (Appinio, 2020).

The German Caravanning Institute, together with AL-KO Fahrzeugtechnik (Automotive Engineering), carried out a survey of 500 recreation vehicle and caravan owners. 69 % of those questioned are planning at least one trip with their recreation vehicle or caravan this year. Two thirds intend to travel in the next six months, but 63 % are uncertain whether they will be able to take the next trip. 28 % assume that this year only Germany is possible as a travel destination for them (Deutsches Caravanning Institut and AL-KO Fahrzeugtechnik, 2020).

Both studies showed that domestic tourism is interesting for many travellers in Germany. This may be an indicator for the increased search for topics like glamping which is seen as a possibility of domestic tourism.

In Great Britain a study called “COVID-19 Consumer Tracker” by VisitBritain shows that 21 % of the adults in Great Britain are confident enough to take a short trip or holiday in their home country in July 2020. 44 % have already booked or are planning a short trip or holiday in Great Britain by September. Most people who will travel between July and September mainly use "caravan/camping" (36 %) as accommodation, as well as "private apartment" (35 %) or "hotel/motel/inn" (35 %) and "commercial rental" (35 %) (VisitBritain, 2020, pp. 10–20). These results are

interesting and show that, in times of the coronavirus, domestic tourism is the preferred type of tourism for the residents, and camping is an important type of accommodation.

Two examples from European countries have shown that in times of COVID-19, domestic tourism will experience a high demand.

3.2 Glamping grounds and accommodation

Glamping involves camping in high-specification accommodation (Robinson, 2012, p. 6). Glamping makes it possible to travel outdoors without having to bring any equipment, and there are the luxurious amenities and services typical of a hotel (Dangel *et al.*, 2020).

According to Petrusa and Vlahov (2019) and Robinson (2012) there exist different types of glamping accommodation. The following forms of accommodation can be distinguished (Petrusa & Vlahov, 2019, p. 837; Robinson, 2012, p. 6):

1. Glamping domes and tents (bell tents, yurts, safari tents, tipi, hybrid tents);
2. Cottages and huts (wooden cottages, huts, caravans);
3. Caravans (like airstream caravans);
4. Other unusual glamping accommodations (wagons, water or underwater facilities, igloos etc.).

A yurt is a traditional home from Mongolia. Nomads move through the steppe in these round tents, which consist of a wooden frame and cotton or felt fabrics. The Native American tipi also consists of a wooden frame and strong cloth. Safari tents are spacious tents that can accommodate whole beds, bathrooms and kitchens. A wooden floor can also be provided. They owe their name to their use on early luxury safaris. Airstream caravans are spacious caravans from the USA, which have a typical rounded shape. The outer walls are made of aluminium.

Tree houses, caravans, spacious caravans and recreation vehicles are also offered as luxury accommodation. There are even more extravagant ways to stay overnight. Tree houses equipped with a whirlpool, or bubble tents, in which the glamper feels as if they have spent the night outside, are just two examples. Wooden chalets or lodge tents are other forms of accommodation. Newer kinds of accommodation include igloo huts made of natural wood or kotas, Finnish wooden cabins with a grill in the middle (Golebiowski, 2018).

Glamping accommodations offer numerous layouts, from single rooms to multi-bed cabins (Dangel *et al.*, 2020). There are a variety of accommodation options and providers seem to be looking for new and even fancier options.

There is a growing demand for comfortable stays in a natural environment combined with “well-kept dream resorts” (Cvelić-Bonifačić *et al.*, 2017, p. 102). Glamping can be divided into two areas, resort glamping and caravan glamping. Resort glamping is carried out in a luxury resort, while caravan glamping makes use of a luxury caravan (Budiasa *et al.*, 2019, p. 1).

Many glamps² offer excursions and adventure tours outside, such as safari, hiking, rafting, etc., but the emphasis is on the comfort of the guest (Petrusa and Vlahov, 2019, p. 838). Adding glamping accommodation to existing camping ground as a way to attract guests who are not traditionally campers is suggested as a possible solution to overcoming the seasonality problem in the camping industry (Cvelić-Bonifačić *et al.*, 2017, p. 102).

Where can glamping sites be found in Europe? The following charts analyse data provided by two of the primary online aggregators of glamping offers – “Glampinghub.com” and “glamping.com”. The Data was collected in March 2020.

² Glamps is the short form for glamping grounds.

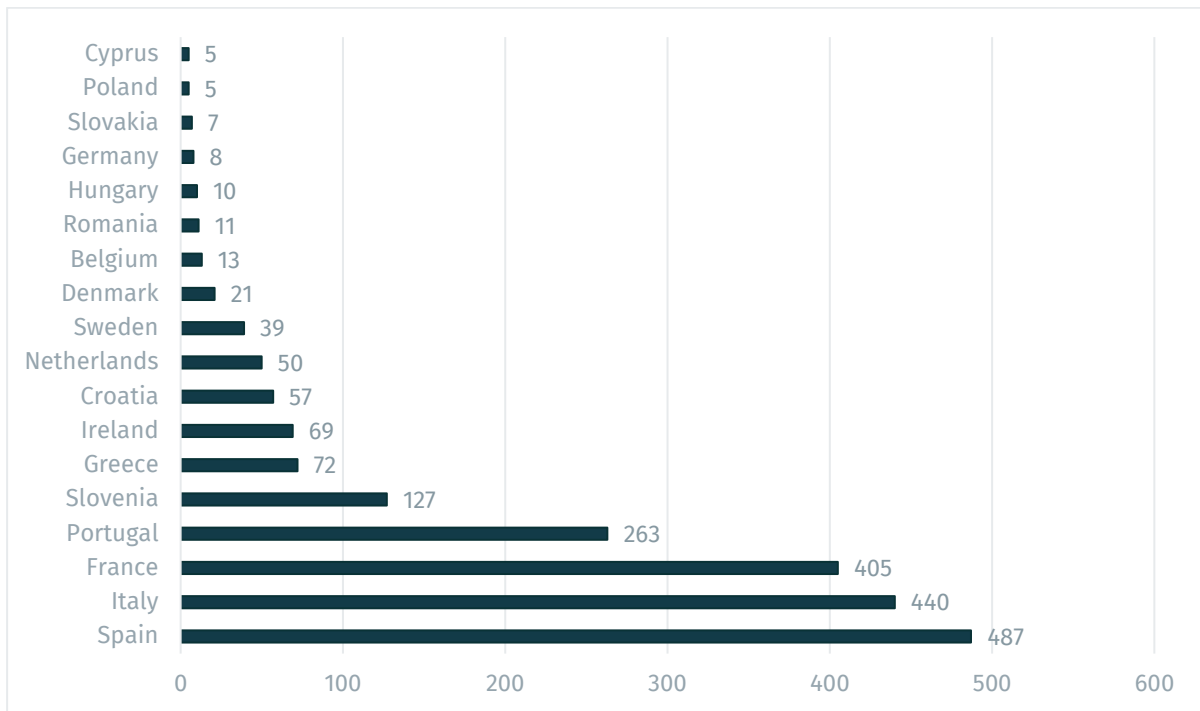


Figure 5: Glamping offers on glampinghub.com (5 or more) in countries of the EU (Edit by author according to the data from glampinghub.com (19.03.2020))

Analysis of the website glampinghub.com showed that most glamping offers within the EU can be found in Spain, Italy, France and Portugal.

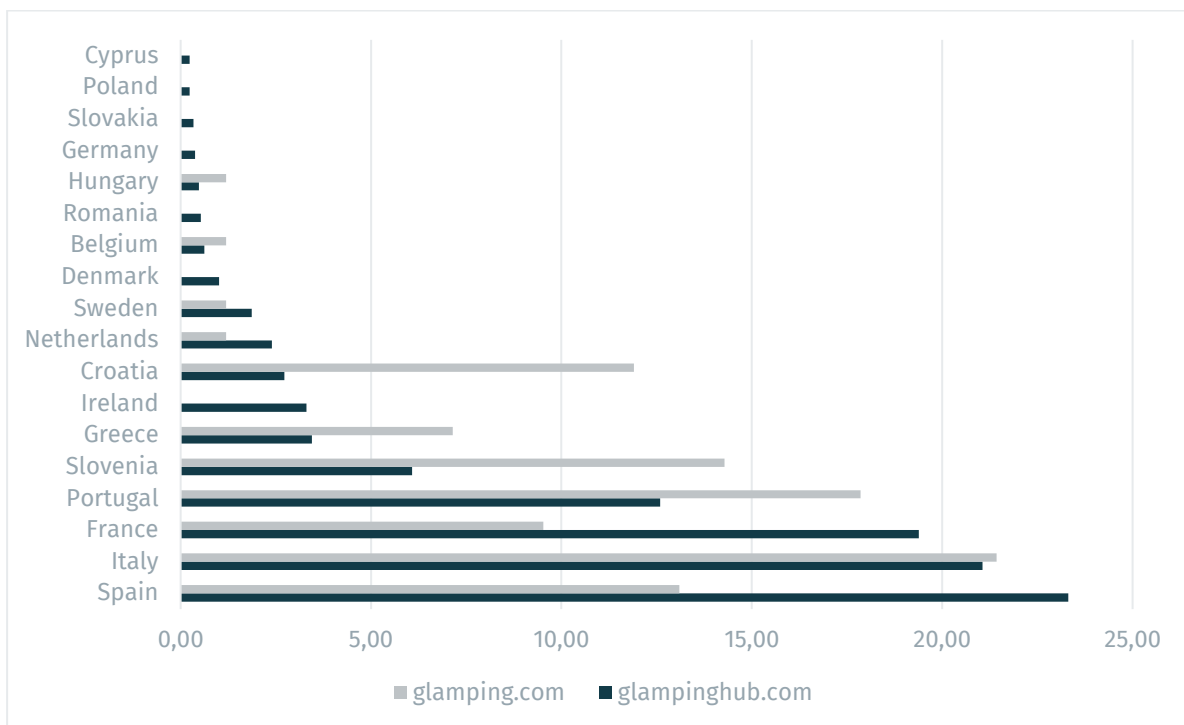


Figure 6: Offers on the main online intermediaries in comparison (in percent) (Edit by author according to the data from glampinghub.com and glamping.com (19.03.2020))

However, the offers differ. The website Glamping.com offers more in Portugal, Slovenia, Greece and Croatia. But at the time the analysis was done, this website had a smaller range of offers in the EU (84) than Glampinghub.com (2089). An exact statement about the number of offers can therefore not be made and requires further statistical research.

However, it can be stated that in many European countries there are already concrete offers in the field of glamping, which indicates that glamping is not just a passing trend. Large investments will have to be made in camping grounds in order to build and design exceptional accommodation. This process must prove worthwhile for operators, especially in times of crisis that threaten so many livelihoods.

3.3 Glampers - Demand and motivation

Campers and glampers are not essentially different. Both are vacationers who like to stay outdoors. They occupy a continuum from simple campers to extravagant glampers. Campers and glampers seek out authenticity by experiencing nature as a kind of escapism. But they do that in a different way. Nature and escapism are two main elements involved in experiencing authenticity. Campers like to interact with nature and are looking for adventure, while glampers want to experience nature as a spectator and see it as a kind of fairy tale (Ahn and Lee, 2015, p. 13).

In an interview with German newspaper Handelsblatt, researcher Eike Wenzel, head of the Institute for Trends and Future Research, says that "today, the well-educated target group between 30 and 50 demands glamping offers." (Wermelskirchen, 2018). A study by Cvelič-Bonifačić, Milohnić and Cerović (2017) confirms that glampers are younger, well-educated and permanently employed with good incomes (Cvelič-Bonifačić *et al.*, 2017, p. 107).

Leci Sakáčová (2013) pointed out that for the caravan glamper the caravan is very important. They prefer the caravan because they can decorate it according to their taste. They feel at home and therefore prefer the caravan to the hotel. They can discover the world and still have a familiar environment inside the caravan (Leci Sakáčová, 2013, pp. 36–43).

There are two basic factors to explain travel motivation. In the literature a distinction can be made between a push effect ("to get away from it all") that motivates people to seek a holiday, and a pull effect, which acts to attract (Page, 2015, p. 86). The most important push factor for glampers is spending time with family or friends. They like to spend time together. Another push factor is a need for rest, relaxation and peace (Leci Sakáčová, 2013, pp. 51–53). Glampers want to relax and enjoy a peaceful place. They want to escape from the everyday life, and also have a strong need for privacy (Petruša and Vlahov, 2019, pp. 838–839). The most important pull effect which has an impact on where the glampers travel (destination-wise) is the wish of the glamper to experience nature and see beautiful places (Leci Sakáčová, 2013, p. 55).

Leci Sakáčová identified a number of pull factors (2013, p. 57):

1. A need to be close to nature
2. A need for privacy (more space between caravans)
3. An interest in special outdoor activity
4. A need for luxury and high-quality service

Resort glampers wish to have everything they need during their holidays. On the one hand they want to be close to nature, but on the other hand they also want every possible comfort (Leci Sakáčová, 2013, pp. 58–59). Glampers expect high quality and are willing to pay a higher price for it (Petruša and Vlahov, 2019, p. 839). According to Petruša and Vlahov (2019) the desire of tourists to see beautiful places and have an unforgettable experience in nature is the main motive for glamping (Petruša and Vlahov, 2019, p. 839). Eco-friendliness is also important for glampers (Leci Sakáčová, 2013, p. 49). These are two essential features of glamping that seem difficult to reconcile: luxury versus environmental friendliness.

The majority of glampers are temporary leisure guests, but there is also a growing segment in incentive travel for companies in the United States, for example. They are looking for places for unique and casual excursions. Typically, such incentive trips are generated by companies in the technology sector, such as Google or Netflix (Dangel *et al.*, 2020). But there are also guests who want to enjoy a luxurious, unusual treatment motivated by a particular event, such as a wedding, anniversary or honeymoon (Petrusa and Vlahov, 2019, p. 839).

4 Conclusions

Camping and glamping can be classified in the category of nature-based special interest tourism. For both variants closeness to nature is essential. However, there is a difference in the perception of nature. The campers want to be in nature. The glampers want to enjoy nature more like an uninvolved observer.

There is an overlap with regard to accommodation. The type of accommodation is important for both glampers and campers. For glampers, however, it is important to stay in a special or particularly luxurious accommodation. And they want more comfort and a higher standard of infrastructure and service.

The biggest difference between campers and glampers seems to be the glamer's desire for privacy, while the campers are looking for social contacts.

Camper	Glamper
<ul style="list-style-type: none"> • Social contact • Freedom • Reconnection with nature • Adventure • Stress reduction 	<ul style="list-style-type: none"> • Being close to nature • Special location • Comfort • Unusual accommodation • High standard and service • Nice ambience • Exciting activities • Environmental friendliness • Privacy

Figure 7: Characteristics of campers and glampers

The expectations of camping grounds are rising. It is no longer enough to simply offer a meadow and washing facilities. The offers become more differentiated and adapt to the wishes of campers or glampers, e.g. in terms of types of accommodation. Because of the coronavirus crisis camping and glamping may be not only a niche option but also a reaction to the increasing demand for domestic holidays. But the number of glamping places is not the same in every European country. There are big differences in the number of offers in various countries.

The demand for glamping and the number of corresponding camping grounds in Europe suggests that glamping is not just a new word creation, but a new segment of the camping industry. It appeals to new customer groups who would not normally camp. This could create new opportunities for camping ground operators and the camping industry in times of higher domestic demand.

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