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Are Camper Travel Lovers the new wave of tourism? A growing trend for destinations

Abstract: This research analyses the challenges of an emerging tourism segment, which we shall call 'Camper Travel Lovers' (CTLs) and is linked to the users of motorized vehicles such as motorhomes and camper vans for tourism purposes. The study focuses on Girona Province (Catalonia, Spain) and uses primary sources of information to conduct quantitative research through a structured survey. A total of 406 such surveys were carried out with camper van users to determine their current profile. Although the goals of this new segment are to seek out greater contact with nature, relaxation and discovery of new territories, while sharing the experience with family or friends and guaranteeing safety in the face of the new health emergency situation caused by COVID-19, CTLs differ from travellers who adopt a lifestyle focused on the concept of #vanlife and also retirees or Grey nomad caravanners, because they use their vehicles for short holidays. Since the CTL segment has undergone exponential growth in recent years and been further boosted by COVID-19, given that as a means of travel it reduces contact with others and minimizes the risk of contagion, we see it as representing a trend in tourist mobility in the coming years, therefore posing both challenges and clear opportunities for managers of DMOs.

Keywords: tourist segment, camper travel lovers, COVID-19, camper vans, Girona

1.- Introduction

For the automotive industry, the manufacture of motorhomes (Practical motorhomes, 2022) and camper vans (Graham, 2019) is a growing market, with the number of such vehicles registered annually in Europe doubling since 2010 (European Caravan Federation, 2019). A good example of this growth is the Spanish market, where the number of registrations rose from 1,293 in 2013 to 8,903 in 2019, almost a seven-fold increase in just over six years (Cetelem Observatory, 2020).

The reason for this rise in the number of registrations is not strictly confined to the vehicles themselves, since the technical evolution of camper vans and motorhomes has been limited in comparison with the transformations taking place in other automotive segments: there have been aesthetic and functional adaptations, but nothing like the revolutions in electric and hybrid vehicles. In fact, the very significant growth in the sector has to do with the behaviour of vehicle users, and more specifically with the shaping of a new profile of tourist demand.

Authors such as Chassey (2009), Lévêque (2011) and Wilson & Hannam (2017) have emphasized the implications that the aforementioned growth has for tourism consumption and for tourist mobility in particular.

Added to this boom in the sale of motorhomes in Spain over the last five years, 2020 saw an even more notable rise due to a multi-factor process in which COVID-19 also played a part. According to Bono (2020), due to the pandemic, rentals of motorhomes and camper vans increased as people sought a more socially isolated way of spending their vacation. Thus, the pandemic and the complex situation it created benefited this form of travel, because motorhomes allow people to move around more independently, avoiding large crowds and high levels of social contact.

Furthermore, the use of these vehicles also allows people to engage in a different type of tourism consumption, as studied by Caldicott, Sherrer & Harris (2022) and Collins, et al. (2020). Specifically, the combination of this premise with their exponential growth and importance within the tourism market has turned them into a new segment to bear in mind for the planning of tourist destinations, as it will be one of the trends in tourist mobility in the coming years. This new segment should be approached from the perspectives of both tourist profile and vehicle type, as they have different, yet related, implications for planning.

Given this context, from a tourism management point of view it is important to establish effective communication with potential CTL tourists in order to attract them to particular destinations. This can be achieved if their profile, preferences and needs are identified, insofar as effective communication involves reaching them and knowing where they are concentrated in geographical terms, whether this refers to their place of origin, camping in a specific geographical location or even when already at the intended destination itself.

Thus, identifying the CTL tourist profile will contribute to facilitating improvements in planning and decision-making when it comes to developing priorities for CTLs and marketing strategies for CTL tourism products and services, as well as helping understand guest-host relationships and their impacts on tourism.

Therefore, the aim of this article is to fill a gap in the academic literature on motorhome and camper van tourism by examining the CTL tourism segment and profiling these tourists and their behaviour in the context of COVID-19. A further aim is to discuss what authors such as Meyer (1994), Chassey (2009), Lévêque (2011), Caldicott (2011), Dorn (2015), Monroe (2017), Wilson & Hannam (2017), Forget (2018), Dodier (2019), Gretzel & Hardy (2019), Bono (2020) and Caldicott and Sherrer & Harris (2022) highlight in relation to tourist activity and motorhomes and camper vans.

The province of Girona (Catalonia, Spain) was chosen as a case study for the purposes of this research, since it has traditionally been a popular destination for motorhomes and camper van tourism thanks to its geographical location, its proximity to outbound tourist markets and because it is one of the areas experiencing this growth in CTL tourists.

2.- Literature Review

2.1.- The background to Caravan Tourism (1951-2022)

Caravan tourism is a type of tourism that combines both leisure and sightseeing with the experience of freedom (Kearns et al., 2017).

Historically, the origins of this industry can be traced back to 1951, with the first model of caravan developed by the Westfalia company. Later, in 1961 Volkswagen commenced mass production of the camper van. Despite VW being a European manufacturer, the main market for this type of vehicle was initially concentrated in North America, and it was not until the late 1980s and early 1990s that growth slowly began in Europe (Meyer, 1994), coinciding with the emergence of collectives of people attracted to activities related to this new ‘caravan tourism’.

This tourism segment has rarely been the subject of scientific research, however. According to the definition by Prideaux and McClymont (2006), caravanning is a subset of tourism in which the main form of accommodation during a trip is a recreational or camping vehicle. Caldicott et al. (2014: 434) defined a recreational vehicle as 'any motorized or towable caravan used as a mode of accommodation'. Hence, caravan tourism is characterized by the fact that tourists' transport, accommodation and meals all take place in their own caravan or motorhome (Gaładyk & Podhorodecka, 2020).

Among others, Dickinson & Lumson (2010), Wu & Pearce (2017) and Patterson (2018) all agree that motorhome and camper tourism constitutes a blend of two key elements of tourism in a single space: mobility and accommodation. It is with reference to this duality that we find the definition offered by Hardy & Gretzel (2011: 194), who also conceive it as a form of tourism that involves tourists using various vehicle types as a means of transport and the primary form of accommodation on their holiday.

2.2.- Caravan tourist profiles

In the 1990s, European growth in caravanning had a very a specific user profile, largely dominated by retired people with high incomes who used the vehicle to travel throughout the year – with high mileage – and mainly in Central European markets (Meyer, 1994). Later, there would be a diversification of profiles (Forget, 2018), which included more professional uses of the vehicle and lifestyle elements as a way of understanding modes of travel, which has come to be known as VanLife. Authors and characteristics for both segments are presented in Table 1:

Name of the segment	Authors	Characteristics
Grey nomads (Retirees)	Meyer (1994)	• High incomes and purchasing power. • Long holidays.
	Prideaux and McClymont (2006)	• Empty nesters. • Retired or near retirement. • Attracted to three clusters of activities: nature, shopping and eating, and visiting heritage attractions.

	Chassey (2009), Caldicott (2011), Forget (2018)	• Invest in these vehicles on reaching retirement, as a point of convergence between their own space and the ideal holiday space.
VanLifers	Dorn (2015)	• Heterogeneous profiles. • Search for a new understanding of life.
	Forget (2018), Monroe (2017)	• Travel as a lifestyle choice. • Use of motorhomes and camper vans. • A more professional use of the vehicles.
	Gretzel & Hardy (2019)	• Hyper-mobile minimalism. • Strong connections with the digital sphere.

Table 1. Caravan tourist profiles. Source: Authors' own work.

Unlike Grey nomads, the VanLife segment has been clearly dominated by young people with heterogeneous profiles in terms of occupation and economic status, whose common denominator is the search for a new way of understanding life, which they themselves propose as an alternative to traditional living (Dorn, 2015).

Also, according to Dorn (2015: 28), the origins of the VanLife community can be traced back to two classic 20th-century American writers, Jack Kerouac and John Steinbeck:

> 'Both Kerouac and Steinbeck travelled the United States to search for the true America and see things that they have only read about, or never even heard about. In the end, they both lived a life on the road and in their own ways, rejected societal norms and enjoyed a period of wandering. Jack Kerouac and John Steinbeck were the original storytellers to explore America by road, but into the 21st century a new type of storyteller emerged and with it developed a supportive community known as VanLife.'

In the summer of 1947, Kerouac left the Queens borough of New York where he was living to embark on a three-month journey that would take him across the United States. Although the novel resulting from his experiences would not see the light of day until 1957, the time slot overlapped with the Westfalia company developing its first camper van model in 1951 (Meyer, 1994). '*On The Road*' would become one of the most influential novels of the 20th century (Dorn, 2015: 15).

Believing that he had lost contact with the real America, John Steinbeck also decided to make a three-month trip to observe the changes his country was experiencing with his own eyes, so he took a specialized camper comprising of a three-quarter-tonne pick-up truck. The result was the 1962 book '*Travels with Charley: In Search of America*'.

Monroe (2017) considered the inventor of the #vanlife hashtag to have been Foster Huntington, who left his apartment in New York and his job as a designer for Ralph Lauren in 2011 to live in an old second-hand Volkswagen van. Although Instagram was only in its infancy, he very soon had a million followers. Huntington tagged his posts with phrases like #homeiswhereyouparkit and #livesimply, but the tag he used most often was #vanlife. Monroe (2017) was surprised to discover that just six years later, more than 1.2 million Instagram posts had been tagged #vanlife. Indeed, this growth has not only continued but grown exponentially, so that in December 2022 Instagram had more than 14.1 million posts tagged #vanlife, representing a more than seven-fold increase in just four years. 'What began as an attempt at a simpler life quickly became a life-style brand' (Monroe, 2017).

There is, then, a huge generational contrast in the two main profiles documented in the bibliography, Grey nomads and VanLifers, despite their sharing several common elements such as the concept of freedom, contact with natural spaces, or the symbiosis between the space of residence and means of transport. Putting these generational profiles to one side for the moment, Patterson (2018) classified users of motorhomes or camper vans into three major groups according to their use: those who use the vehicle as a permanent residence; those who use it as a means for enjoying a long holiday of at least four consecutive months; and finally, those who use the vehicle occasionally as a means of tourist consumption.

On the other hand, Prideaux and McClymont (2006) revealed interesting results from their study that indicated a change in the trip characteristics of caravanners, reflecting a decline in the family holiday during school holidays and an increase in longer trips taken as a post-retirement journey (mostly from one to three months).

Beyond distinguishing between user types, this classification has clear implications for the tourism sector. In terms of tourist consumption, we find one group that views holidays in these vehicles as a way of achieving a certain degree of self-realization, which would link with the trends generated by VanLife (Light & Brown, 2020), while others look for elements such as familiarity, the comfort of the space or finding tranquillity in this type of tourism (Lévêque, 2011; Kaaristo & Rhoden, 2017; Mikkelsen & Cohen, 2015). With regard to the impact on tourist destinations, a huge disparity of views can be observed: on the one hand, there is a traditional conflict between the hospitality and camping sectors, the former seeing caravan tourism as a threat to its business model, considering caravan parks competitors that offer almost no or no services and a poor destination image. Meyer (1994) highlighted friction between French hotels and camping associations, and more recently, in 2020, many voices in Spain called for greater control and more restrictive regulations on caravan parking (Alquiler de Autocaravanas HNOS. Piqueras, 2020). An opposing view is offered by studies such as those by Wu & Pearce (2017), which have highlighted the positive links between caravan tourism and sustainable regional development.

2.3.- Camper Travel Lovers (CTLs)

In the summer of 2020 in Europe – amid the context of a new trend in tourist consumption deriving from the COVID-19 pandemic – caravan tourism became commonplace all over Spain. If in previous summer seasons motorhome or camper van use was associated with foreign tourists, in the 2020 season restrictions on mobility led to this becoming one of the modes of tourist consumption with the greatest growth and visibility in western Europe. However, this trend was not based on VanLife or the retired Campervan user; the present study shows that tourism growth in this segment can be attributed to a new profile, one that we shall call 'Camper Travel Lover'. 'Camper' because this word simultaneously represents the method of accommodation and transport – motorized vehicles as motorhomes and camper vans; 'Travel' because we are dealing with the leisure and travel sector; and 'Lover' because this segment is a huge fan of this type of travel. It also involves engagement in the CTL community, which these individuals love and form a part of (Hardy, A., Gretzel, U., & Hanson, D., 2013), but does not oblige them to do anything, since they want to participate in it voluntarily. Furthermore, CTLs use the vehicles for short holidays (Patterson, 2018), differing from the patterns exhibited by VanLifers and Grey nomads. As a term, 'Camper Travel Lovers' is both appealing from a marketing perspective and intelligible at first sight.

3.- Methodology

3.1.- Research area

The area selected for the study is in the north-eastern part of Spain, in the autonomous region of Catalonia. Specifically, the geographical scope of the study comprises what are known as the Girona counties, of which there are eight: Gironès, Alt Empordà, Baix Empordà, La Selva, Pla de l'Estany, Garrotxa, Ripollès and Cerdanya, with a total of 765,554 inhabitants (IDESCAT, 2020).

Figure 1. Situation Map of the Study Area (the Girona counties, Catalonia).

One of the main characteristics of the region known as the Girona counties is its geographical location, bordering France, and its proximity to the main European outbound tourist markets, which makes it ideal for motorhome and camper tourism from these markets as the main point of entry into Spain.

These counties comprise two distinct tourist brands: the Costa Brava brand and the Girona Pyrenees brand. The Costa Brava is a mature destination with a long history and very extensive experience in the world of tourism (Donaire et al., 1997; Mundet, 1998; Priestley & Mundet, 1998), while the Girona Pyrenees is an emerging destination whose key values or assets are nature and authenticity.

The region received 7.9 million tourists in 2019, of whom 3.7 million were foreigners and 4.1 million Spanish (Costa Brava Girona Tourist Board, 2020). The Costa Brava has the capacity to accommodate a total of 203,064 visitors, with 121,230 of those spaces on campsites. The Pyrenees has a capacity for 59,523 visitors, with 37,183 spaces on campsites (IDESCAT, 2019). The average length of stay at a campsite is 5.8 days on the Costa Brava and 4.4 in the Pyrenees, considerably longer than other types of accommodation, which have an average of 3.5 days on the Costa Brava and 2.1 in the Pyrenees. The Girona Campsite Association (2020) estimates that 80% of these guest beds are on camping pitches, and therefore suitable for camper vans and motorhomes. The campsites on the Costa Brava and in the Girona Pyrenees represent 57% of the total in Catalonia and are therefore considered an ideal model for this study.

3.2.- Research method

To define the research method for this study, previous studies on motorhomes and camper vans were consulted, some of which used primary sources and others secondary sources, as shown in Table 2:

Type of source	Authors	Focus of the research	Methodology
Primary sources	Dorn (2015), Monroe (2017), Gratzel & Hardy (2019) and Rischitelli (2018)	• What is happening on social media (especially Instagram). • VanLife.	• Qualitative
	Wilson & Hannam (2017)	• Profile of users of motorhomes or camper vans.	• Qualitative

	Wu & Pearce (2017)	• Motivations patterns of motorhomes or camper vans users. • Grey Nomads.	• Qualitative and quantitative
	Wilson, Chambers & Johnson (2019)	• The 'embodied relationship' between drivers and their vehicles.	• Qualitative
Secondary sources	Meyer (1994), Chassey (2009), Lévêque (2011), Forget (2018), Patterson (2018), Dodier (2019) and Light & Brown (2020)	• Profiles of motorhome or camper van users from studies carried out by associations in the sector.	• Qualitative and quantitative

Table 2. Previous research on motorhomes and camper vans by type of source. Source: Authors' own work.

Specifically, and in contrast with previous academic research (see Table 2), this study used primary sources of information to conduct quantitative research with motorhome or camper van users. The aim was to determine their current profile through a structured survey, considering some of the variables used by the aforementioned authors.

Study sample

The sample design comprised a total of 425 subjects, all users of motorhomes and camper vans holidaying in Girona province between July 15 and August 15, 2020. This sample – designed for an environment of maximum indeterminacy and with infinite populations – gave us a confidence level of 95% and a margin of error of 4.7%.

As the study focuses on CTL tourists who chose Girona province as their summer holiday destination, it was first necessary to geolocate the targeted subjects within the territory. These locations were called collection points. In order to draw up the list of collection points, a double-entry matrix was used, taking the following variables into account:

1. Accommodation type: including the categories of free camping (located using the Park4Night app), motorhome area (located using the municipal tourist offices), small campsite (fewer than 200 pitches, selected via the Costa Brava Camping Association) and large campsite (more than 200 pitches, selected via the Costa Brava Camping Association).
2. Destination type: in order to reflect the diversity of the Costa Brava Girona tourist destination, two variables were considered - coastal destinations and inland/mountain destinations.

A total of 15 different collection points were generated throughout the region. Once these were defined - with the sample number cast - a random selection of subjects was carried out within each point to collect the data. Collection was aleatory in the case of campsites, and in free camping zones collection started with the motorhomes and camper vans closest to the location's entry point and continued to those parked further away.

A random discrimination criterion was tried out during the trial and testing phase to guarantee data reliability, but it proved impossible to apply at the collection points, so it was discarded.

Data were collected in the period from 15 July 2020 to 15 August 2020, as this is the period of greatest annual tourist influx in the region. The collection was performed on a daily basis, every day of the week to avoid a bias from weekend profiles.

Survey design

The survey was structured into five large blocks of questions: vehicle profile; camper demographic profile; tourist type; tourism consumption frequency; and behaviour linked to COVID-19.

These blocks worked with a total of 31 questions and a set of 50 variables. The survey was conducted face-to-face and the data were entered by the interviewer into the information collection software (1KA) on a digital device. The survey was available in six languages: Catalan, Spanish, English, French, German and Dutch. With regard to methodology, in order to avoid problems with translations, a back-translation was performed to detect possible errors, with one error being found in the German translation.

Prior to the commencement of data collection, a pilot test was carried out in each of the languages in order to identify possible comprehension problems. This test was conducted on 11 July 2020 and no problems were identified; the responses to all of the surveys entered on that date were removed.

Data analysis and cleansing

The results were obtained using the SPSS statistical analysis software. In order to carry out the analysis, first, a study of frequencies and means was performed to obtain a description of the variables, and the correlations between these were then studied using bivariate descriptive statistics and linear correlations from the Pearson correlation index.

The SPSS environment was used to assist with data analysis. A total of 19 surveys were identified in which there was some kind of problem with the information entered. Applying the criterion of relative prudence, those surveys with an answer that could be understood as erroneous were eliminated. The final result of the sample studied was 406 surveys.

4.- Results

The analysis of the results mirrors the structure of the five blocks identified in the survey: vehicle profile; camper demographic profile; tourist type; tourism consumption frequency; and behaviour linked to COVID-19.

1.- Vehicle profile

The first element to be analysed was the type of vehicle used by respondents. In this respect, most of the people surveyed were found to own vehicles that would be classified as motorhomes (79%), while the camper van segment was clearly smaller (21%). These data coincide with those from the study carried out by the Spanish Caravan

Industry and Trade Association (ASEICAR) in Spain (2020), which identified camper vans as 18% of the total. Although some studies (Catalan Autonomous Government, 2020) point to the rental of these vehicles as a growing trend, the reality is that their relative weight among respondents in our study was residual, the overwhelming majority being owners (98%), with only a marginal 2% renters. Regarding the length of ownership of the vehicle reported by the respondents, the results indicated that for 15.3% it was their first year of ownership; 18.5% had owned the vehicle for 2 or 3 years; 18.6% for 4 or 5 years; and 47.5% over 5 years. This finding is in line with data for vehicle registrations (Cetelem Observatory, 2020), which show a clear trend towards growth in the sector, with more than half of the respondents having owned their vehicle for less than 5 years, bearing in mind that these vehicles have a long active life.

2.- Camper demographic profile

Regarding the profile of the respondents, first of all we observed a practically equal distribution between male and female, with a slightly higher presence of women (52.4%) than men (47.6%).

With regard to age, the average was 46.2 years, with a standard deviation of 10.98 years. This gives us a profile whereby almost 80% of respondents were travelling as families and aged between 33 and 56. This finding is especially significant in that it clearly moves away from the twin profiles of the senior camper van user and the young VanLife consumer. Analysing the correlation of the age variable with the vehicle purchase time variable, no correlation was found between the two, and the aforementioned age group would therefore be the majority segment in terms of the acquisition of new vehicles. With regard to age, this led us to conclude that neither of the segments previously identified in the academic literature – VanLifers and Grey Nomads (see Table 1) – was responsible for the growth in registrations during the course of this study.

As for the origin of the respondents, behaviour was found to be especially conditioned by the situation arising from COVID-19 in the summer of 2020, where there was a consumption of holidays closer to home. If this is a segment traditionally associated with the central European markets on the Costa Brava, these data painted a very different scenario, with 62.3% of respondents being domestic (Catalan or Spanish), 19.5% Dutch, 9.6% French, 5.5% Belgian and 4% from other places.

Regarding the level of education among respondents, this was found to be high, with 44.8% having university studies, 34% vocational training, 20% basic schooling and only 0.7% not having studied. If we compare these data with OECD level of education data (2020), we find a bias of almost 18 percentage points with respect to the values expected for the overall population.

As for employment status, the average profile again differed from those resulting from the analyses conducted by Meyer (1994), Chassey (2009) and Forget (2018), in which retirees were prominent. In our survey, retirees represented only 9.1% of respondents, while those in active employment were in the majority, with 52.2% being employees, 16.7% employers and 14.7% civil servants, which also matched the age range of the majority of respondents. There was also a further category of "Other", which accounted for the remaining 7.3%, in which it is worth noting the residual presence of unemployed people, at 0.7%.

The next element in the profile of motorhome users focused on their purchasing power. In this case, the average purchasing power was an annual income of €35,554. After readjusting for a standard purchasing-power profile – arrived at by weighting disposable income for the different origins of the respondents – we can state that their economic profile was higher than average, specifically 29% higher than the aforementioned readjusted profile. In this case, a correlation was found between the respondents' purchasing-power variable and their place of origin. Thus, international tourists – mainly those from Central European countries – had higher average incomes than residents in Spain. This situation of a high or above-average purchasing profile would confirm that identified for other segments by Meyer (1994) and Wilson & Hannam (2017), as well as the findings of different studies conducted by sector associations.

3.- Tourist profile

Considering the tourist profile, those aspects intuited from the analysis of the respondents' age were confirmed, giving shape to a new tourist segment. First of all, it should be noted that the hegemonic segment of the sector has clearly shifted to that of the family (Podmore, 2014, 24 August), which represented 74.1% of cases. This provides further evidence of an increasing trend in the sector, already pointed out by Wilson & Hannam (2017), who highlighted this profile in their survey of 53 motorhome users. Additionally, we also found couples (20.7%), individual travellers (3.2%) and groups of friends (0.5%), while ‘Other’ accounted for 1.5%. Associated with this profile, there was the number of people travelling together, which was 3.6 on average, with a standard deviation of 1.19 (maintaining predictable correlations with tourist types).

Within this tourist profile, it is especially important to analyse elements of behaviour in relation to holiday organization, with the notable finding that 100% of respondents stated they had organized their holidays themselves, therefore without using travel agencies or organized tours.

4.- Tourist consumption frequency

The first element of tourist consumption is the number of trips made with the motorhome or camper van during the year. Specifically, 24.1% of respondents stated that they only make one trip during the year; 40.6% made between 2 and 5; 15.5% between 6 and 10; and 19% stated that they make more than 10. Therefore, here we have a user profile that, far from using the vehicle for long holidays or as a living space (as noted with the VanLife profile), takes holidays at different times of the year, generating multiple trips. Closely linked to this holiday breakdown, participants were also asked about the season in which trips are taken; the results are shown in Table 3.

	No trips		**Few trips**		**Many trips**	
Season	**Frequency**	**Percentage**	**Frequency**	**Percentage**	**Frequency**	**Percentage**
Winter	179[a]	44%	187	46%	40	10%
Spring	77	19%	248	61%	81	20%
Summer	0	0%	154	38%	252[b]	62%
Autumn	89	22%	272	67%	45	11%

Table 3. Distribution of CTL trips by season in 2020 (N = 406). Source: Authors' own work.

This table shows the distribution of the number of trips taken by motorhome and camper van users during each season. From this, it can be deduced that the number of trips is conditioned by the weather, with winter being the period that generates least activity ([a]) and summer the one with the highest concentration of trips ([b]). It is important to highlight the noteworthy implications that this information has at the level of destination management, since it reveals a user profile that – despite most of its tourist activity being in the summer – also makes a significant number of trips in periods with less tourist concentration in Girona province and is therefore a clearly deseasonalizing segment.

With regard to trips made throughout the year, another important element is determining the place of overnight stay. For this reason, respondents' overnight stays were divided as a percentage, with the following results: free camping (6.27% of stays), campsites (82.5% of stays), motorhome areas (10.7% of stays) and other (3.6% of stays). The first conclusion we can draw here is that campsites are the natural point of accommodation for motorhomes and camper vans, especially as 'outdoor hospitality has increased its offer on quality products and amenities for this profile users' (Brooker & Joppe, 2013: 5). On the whole, other types of accommodation carried much less weight. If this element is important in itself, the implications with standard deviations and correlations between variables are also particularly significant, allowing us to draw the following conclusions:

1. The standard deviations for all categories were very similar, at values of 25%-28%. Analysing these in detail, most were due to the fact that a very similar percentage of users was found in each of the categories – around 30% – who said they used just one of these modes for all their accommodation needs. This means that around 70% of the respondents used more than one different accommodation point in their tourist consumption throughout the year.
2. When correlating the surveys collected at campsites with the percentage of overnight stays on campsites, no correlation was found between these variables. Therefore, those who were staying on the campsite at the time of data collection

also used other accommodation points – either free camping or motorhome areas – in their tourist consumption.

3. The same phenomenon emerged when analysing the correlations of surveys not collected from campsites, among which – in the overall calculation – we also found campsites as the main accommodation point.

As for data regarding tourist expenditure, these were configured using a stratified table, which revealed an expenditure of €54.1 per person per day (taking the average value of the categories as a reference). The weight of the expenditure was distributed among the categories as follows: accommodation (34.1%); subsistence (26.4%); transport (18.7%); eating out (11.1%); activities (5.2%); and other (4.5%). Beyond the value obtained and its structuring, it is especially worth noting the following correlations:

1. A correlation was found between tourist spending and tourist origin, with higher tourist spending among foreigners.
2. In cases where the higher percentage of overnight stays was on campsites, the tourist expenditure was higher.
3. Tourist expenditure was 15% higher in the surveys collected from campsites than in those collected outside these points.

The aforementioned correlations are similar to the results of a study conducted by Fieger, Prayag, Hall & North (2019), where findings indicated that camper tourists' uptake of high expense activities is similar to that of tourists staying at B&Bs, campsites or national parks.

As for motivations linked to the trip – with multiple responses permitted – a scenario with three core elements emerged: 'relaxation and well-being' (71%), 'contact with nature' (67%) and 'being with family' (56%). Although the first two are clearly related to elements that other authors have identified among the different tourism motivations of motorhome and camper van users, the fact that sharing the holidays with the family appeared as a determining factor constitutes a new core multinational element. This new factor clearly establishes a new feature of this new user profile that requires further research.

5.- Behaviour linked to COVID-19

This last block focused on identifying elements of tourism consumption found among users of motorhomes and camper vans linked to COVID-19.

The first question in this regard was designed to determine respondents' relationship with the pandemic in order to ascertain possible differing behaviours based on their own personal experiences. In this context, 83% indicated that there had been no COVID-19 infections in their immediate environment – at home or work, while 14% stated that they had experienced mild symptoms and 3% reported having had severe symptoms.

Analysing respondents' relationship with the pandemic, then, the first related issue was the extent to which COVID-19 had affected their holiday, on a scale of 0 – 100 (0 being no effect and 100 completely decisive). The result was a mean value of 52.08, with a high standard deviation of 36.2 points. This indicated a clear effect of COVID-19 on tourist consumption, although it cannot be considered completely decisive, with central values representing the normal distribution of responses. The high deviation also showed that a significant number of people saw COVID-19 as having very little effect on their tourist consumption. However, it is again particularly relevant to observe the behaviour of correlations between variables:

1. The first correlation was found with one's own experience, where there were higher values for the effect of COVID-19 in cases where a person reported mild or severe symptoms in their environment.
2. A correlation was also found with level of income: the higher the respondents' income level, the greater the perceived effect.
3. With regard to trips, the higher the number of trips throughout the year, the greater the perceived effect, especially among those respondents who reported a higher number of trips in non-summer periods. This is understood to be related to the consequences of home confinement.
4. At the level of motivation, the greater the motivation derived from relaxation and well-being, the lower the perceived effect of COVID-19. In contrast, those respondents reporting the highest scores for cultural holidays were the ones who perceived the greatest effect of the virus. According to McKercher & Du Cros (2003), cultural tourism refers to the consumption of cultural attractions, which

may be tangible or intangible assets, the former including historical sites, museums and buildings, and the latter local knowledge and lived experiences such as festivals. Hence, cultural holidays refer to tourists' consumption of attractions classified as cultural.

5. A further correlation was found in expenditure levels (see Table 4), in that the higher the level of tourist expenditure, the greater the perceived effect of COVID-19.

The next element analysed in relation to the influence that COVID-19 has had on motorhome and camper van users was an open-ended question aimed at identifying the main changes in respondents' behaviour. Health measures referred to effective public health actions to mitigate the spread of COVID-19, including face coverings, physical distancing and cleaning or disinfecting. After grouping the variables into different categories, the results were as follows: responses related to tourist behaviour derived from health measures (33.3%); the choice of destination at which to spend the holidays (24.1%); internal mobility at the destination and nearby points (20%); economic elements (1.5%); and other concepts (21.1%).

The above responses reveal a very clear scenario in which COVID-19 has mainly affected the following: 1) the tourist experience, now limited by health measures; 2) destination selection, with a preference for closer destinations and nearby points of interest after arriving at the destination; and 3) tourist consumption focused on a more specific point in the region, conditioned by the overnight destination.

After obtaining these results for the open question, the next step was to classify these changes into categories, in order to identify those that display major changes in consumption among users of motorhomes and camper vans. Seven categories were established. The results are provided in Table 4 below, using a 1-5 Likert scale (1 = unchanged and 5 = many changes).

Category	**1** **Frequency / Percentage**	**2** **Frequency / Percentage**	**3** **Frequency / Percentage**	**4** **Frequency / Percentage**	**5** **Frequency / Percentage**

Accommodation	221	54.4 %	18	4.2%	70	17.2%	9	2.2%	88	21.7%
Transport	278	68.4%	14	3.4%	43	10.6%	4	1%	67	16.5%
Nearby points	154	37.9%	27	6.7%	64	15.8%	13	3.2%	148	36.5%
Restaurants & bars	88	21.7%	18	4.4%	127	31.3%	24	5.9%	149	36.7%
Shops & souvenirs	136	33.5%	20	4.9%	97	23.9%	34	8.4%	119	29.3%
Cultural activities	131	32.3%	14	3.4%	73	18%	34	8.4%	154	37.9%
Sports activities	187	46.1%	25	6.2%	68	16.7%	20	4.9%	106	26.1%

Table 4. Behavioural changes resulting from COVID-19 among CTLs in 2020 (N = 406). Source: Authors' own work.

Firstly, we observe that user responses were polarized between the scores of 1 (no changes), 3 (neutral response) and 5 (many changes). It is therefore evident that:

1. Scores for accommodation and transport – two core elements in the motorhome and camper van segment – were clearly located at the 'no changes' end of the scale. This was especially true of transport, and less so in the case of accommodation, which leads us to think that there was a slight effect – derived from COVID-19 – on the selection of overnight destination.
2. Travel to nearby points of interest – as already observed in the open answers – was one of the elements that underwent greatest change, with 36% of respondents reporting many changes linked to the pandemic.
3. The category of restaurants and bars was the one that obtained highest scores with regard to modifications in behaviour deriving from COVID-19, with only a little over 20% stating that it had not had any effect on consumption.
4. The results for buying souvenirs and shopping were distributed almost equally among the three main responses.
5. As for cultural and sports activities, these displayed almost the opposite behaviour, with a high impact reported for the former (almost 40% stated that they had made many changes) and almost no changes being a virtually majority response for the latter, only 26.1% stating that they had modified their

behaviour in this respect (qualitatively, the respondents' comments were that the changes they had made involved doing more sport).

Finally, to conclude this section, the last question was whether the return to a situation of 'normality', in which the COVID-19 pandemic had disappeared, would lead respondents to use a different form of accommodation more linked to traditional modes. A total of 99.3% of respondents said that in the coming holidays they would continue to use their motorhomes and camper vans. We are therefore witnessing the emergence of a new tourist segment that cannot be considered temporary.

5.- Discussion

There has been a boom in the sale of motorhomes and camper vans in Spain over the last five years, but 2020 saw an even more notable rise due to the behaviour of vehicle users particularly influenced by COVID-19 (Bono, 2020). Since these vehicles represent a means of reducing contact with others during travel and minimizing the risk of contagion, people sought a more socially isolated way to spend their holiday.

However, the segment responsible for this growth is not that of Vanlifers or Grey nomads - already identified and studied by many authors (see Table 1) - given that both represent a lifestyle choice in which the vehicle becomes a long-term home. Rather, the results of this study lead to the identification of an emerging segment: Camper Travel Lovers. Although CTLs use motorhomes and camper vans for their travel and tourist consumption, they do so during short holidays and with the main aim of coming into contact with nature, relaxing and discovering new places, sharing the experience with family or friends, and ensuring safety in the face of new health emergencies caused by COVID-19. From this, we can infer that although Camper Travel Lovers may have their origins in the previous segments already using motorhomes and camper vans, the difference is that CTLs have become more visible due to the use of these vehicles allowing them to engage in a different type of tourism consumption.

Thus, this study conducted during the COVID-19 pandemic shows how COVID-19 has accelerated the aforementioned growth in this new CTL segment. A total of 52% of respondents said their decisions had been conditioned by this situation, mainly with regard to the choice of their holiday destination (24%), health measures (33%), and travel when at the destination (20%). It is also clear that the economic factor is not relevant when it comes to selecting this type of travel (1.5%). The data analysed also reveal that CTLs have a high level of education and a higher purchasing power than tourists who do not make use of this holiday mode.

Moreover, members of this segment own their own motorhome or camper van (98% of respondents) and purchased it within the last five years (52.5%). It is worth noting that according to manufacturers and market data, these vehicles have a lifespan of 20 years, or some 200,000 miles (Storgaard, 2021), and range in cost from €40,000 to €100,000, which is very relevant if we take into account the results of the study, with 99.3% of respondents saying they will use this mode of travel for their next holiday. This finding clearly marks CTLs as a segment that did not emerge solely as a result of the pandemic (although this has accelerated its growth), but rather one that will become relevant in the tourism market and is here to stay.

Indeed, the combination of these premises with the exponential growth and importance of Camper Travel Lovers within the tourism market turns them into a new segment to bear in mind for the planning of tourist destinations, therefore posing both a challenge and a clear opportunity for DMO managers.

6.- Conclusions

The conclusions have been divided into the following blocks: characteristics of demand, destination management and future developments.

Regarding the first of these, characteristics of demand, the contribution made by the present study is especially enriching in that it highlights the emergence of a new segment of tourist demand linked to tourism in motorhomes and camper vans.

As for destination management, our first conclusion affects managers. DMOs will need to make an effort to approach CTLs from perspectives of both tourist profile and vehicle type, as these have different yet related implications for planning. Services, products and tourist experiences should be offered that cater to this segment, while taking into account their seasonal preferences, as 78% make trips in the autumn and 81% in the spring, and 34% of respondents say that they make more than six trips a year. We can therefore conclude that this type of tourist constitutes a deseasonalizing element for tourist destinations.

At the level of destination management, this segment also adds value to expenditure, with those CTLs who spend the night at a campsite generating higher incomes for the destination. In this sense, it should be noted that expenditure is higher among foreign tourists than domestic ones. Also, there is a need to address the conflict between the hospitality sector and the camping sector, because the former sees caravan tourism as a threat to its business model, considering caravan parks and campsites competitors that offer almost no or no services and a poor destination image.

In addition, with regard to destination management and marketing, it is necessary to focus on discovering the territory and product diversification, with this segment mainly consuming products and services related to well-being, relaxation and contact with nature.

The enormous complexities of managing this demand include becoming competitive in an emerging segment and adapting the different elements of the tourist value chain to a unique demand at the destination. The key will be to incorporate managing this segment within all the processes of strategic planning for tourist destinations, which have not previously included this tourist mode. Thus, tourism managers in DMOs should seek to act quickly in order to satisfy this new segment of emerging demand.

If the current implications of these findings are evident for destination managers, the implications for foreseeable future development are even more so. It should be noted that, bearing in mind the useful life of motorhomes and camper vans, the purchase and sale data supplied by those studied in this work for the past five years mean that this tourist segment will undergo a significant increase in the coming years.

This study has allowed us to contribute knowledge regarding a tourism segment that falls fully into line with the trends of postmodern tourism and is in a clear process of expansion. From the point of view of both the demand profile and the multiple challenges it represents in the tourist management of destinations, this new tourist segment - Camper Travel Lovers - will be one of the protagonists of the long tail of the camper van sector.

Limitations and further study:

The limitations of the study relate to the following three elements:

1. The fieldwork: the study was carried out over two summer months, in a very specific timeframe that coincided with the high tourist season and school holidays. It would be interesting for future research to carry out the study at different times of the year and extend it beyond the geographical scope of Catalonia to other countries in order to be able to offer a strategic vision that helps plan tourist destinations. Despite this, the case study is considered to be paradigmatic of the new consumer profile of this tourist segment, which is experiencing a huge boom across the European continent, as evidenced by vehicle registration data.
2. The academic bibliography: one of the limitations of the study is the gap in – or at best the low production of – academic research with respect to this tourist segment. This makes it impossible to compare the data with studies carried out in other territorial frameworks based on a history of monitoring the evolution of the overall demand profile of this segment, or to further investigate specific characteristics related to the supply and demand of motorhome and camper van tourism. In addition, future research is encouraged to explore relationships between risk reduction/avoidance behaviour of travellers and health crises in order to make a connection between CTL behaviours and COVID-19.
3. Data collection: collection of the data was performed during the school holidays and high tourism season (July 15, 2020 to August 15, 2020). This period limitation might have influenced the results of the study, since low or medium season tourists were not considered.

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