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RESEARCH NOTE

Researching snails on holiday: An agenda for caravanning and caravanners?

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Vacations spent in caravans account for a significant strand of the UK leisure market. The potential mobility, yet homelike structures, can be said to offer a base of security when staying away. Like snails, caravanners travel taking their domestic space with them, and when the weather is inclement, or fellow campers unattractive, they can withdraw into their home-like shelter. This research note explores some of the current research and publications about caravanning and caravanners. It also critically explores some of the gaps in current knowledge, as well as suggesting a potential agenda of research themes and topics. Specifically, the piece highlights the need for knowledge about those who choose to engage in this form of accommodation, and their motives for doing so. It is suggested that this should initially focus on the UK, but the note goes on to argue that there are interesting insights to be gained from contrasting and comparing international trends and patterns of usage, as well as the varying profile of users. It also suggests a need for more research on campgrounds and their owners.

Keywords: caravanning, caravanners, outdoor hospitality, self-drive tourism

Introduction

Caravanning and caravanners represent a fascinating element of the national and international leisure market. Caravanners typically reside in locations that are outdoors, which symbolises a return to nature, as well as an opportunity for mobility and vacations in a variety of venues (Joppe, 2013). In many ways these experiences are shared with those who use tents and various other temporary dwelling formats. Unlike other campers, however, caravanners combine mobility with accommodation that incorporates many of the tangible comforts of home (Newton, 2008). When caravanners go on holiday, they can be said to be like snails in that they carry their “homes” with them.

The paper explores caravanning, primarily as a leisure activity, involving both short and long stay experiences. Many of the secondary sources are reports aimed principally at the caravan supply and campsite sectors. Most of these studies tend to conflate data about caravanning and caravanners with data about other outdoor hospitality activities under canvas (Mintel, 2013). Whilst there are clearly consumption trends, tendencies and extrinsic impacts in common, there may be some differences in the way holidaymakers in various canvas and caravan formats react to changing consumer tastes, economic circumstances, and weather conditions. This paper proposes the need for more detailed research that explores caravanning in particular. Similarly, there is a need to have a much more informed picture of caravanners. Some of the research discussed later does give interesting insights, but the suggested market segments in these reports are somewhat crudely drawn and tend to lack detailed linkages between accommodation formats with consumer segments, demographic profiles, and occasionality choices.

This research note suggests the need for a research agenda that addresses the study of caravanning and caravanners, as this will provide an insight into “outdoor hospitality” (Brooker & Joppe, 2013), which, for most participants, is a key vacation experience (Sethi, 2000). Initially the study should explore these activities within the British context, but subsequently explore similarities and differences with other societies. The document highlights current research on caravanning as a leisure activity; it then identifies some of the insights into the caravanners themselves, and finally suggests a research agenda designed to address both current gaps in knowledge, and embellish existing insights.

Caravanning and the great outdoors

This research note recognises caravanning as an element of wider recreation experiences that involve hospitality outdoors (Brooker & Joppe, 2013), and/or drive tourism, and/or self-drive tourism (Prideaux & Carsen, 2003). In essence, this encompasses forms of recreation involving at least one overnight stay away from home, typically with some form of transport incorporating accommodation, to an outdoor recreational destination. In Europe one in six of all overnight stays were spent on a campground (Eurostat, 2012). This “outdoors hospitality” appears to be particularly attractive to Europeans, North Americans, Australians and New Zealanders, though there is said be to be growing interest in China (Mao-Ying & Pearce, 2014) and India (Brooker & Joppe, 2013).

Caravanning is chiefly a recreational activity (though not exclusively), based upon driving from a point of origin to a destination in a vehicle with towable accommodation, or recreation vehicle, incorporating facilities supporting domestic living – shower and toilet, cooking and dining space, seats and beds, for example. Whilst there are some units located in semi-permanent settings, mobility is a key feature of the segment, and much of the literature discusses caravanning and camping as one sector. It is therefore often difficult to distinguish observations about camping, involving tents, and caravanning, based upon these portable structures. This note explores some of these overlaps and identifies potential issues that should be explored in more distinctive detail.

Whilst there is international commonality in this leisure experience, there are variations in the terms employed in different national contexts to describe these activities. The Mintel Report – *Camping and Caravanning – UK*, (2013, p. 15) includes observations about a variety of mobile and static caravans, as well as towable caravans, mobile homes and campervans plus camping in tents and "glamping" – combining glamour and camping.

The National Caravan Council is the over-arching industry trade body, involving the caravan supply chain in the UK. Membership includes the manufacturers of tourers, motorhomes and holiday and park homes; retail dealers of tourers and motorhomes; distributors of holiday homes; holiday and residential park operators; suppliers of components, appliances and accessories; and specialist service providers to the industry (NCC, 2014). The Council describes the caravan sector as covering four broad categories; touring caravans (tourers), that is, towed caravans; motor homes or campervans; caravan homes, meaning semi-permanent homes; and park homes which are more permanent structures designed for holiday parks (NCC, 2014). The NCC's 800 members supply over 90% of all the tourers sold in the UK and a significant share of the motor homes and caravan homes supplied. Park homes are an almost exclusively British market (NCC, 2014).

In the USA, "recreational vehicles" is a term used to describe a collection of leisure activities involving vehicles that include some form of accommodation. Brooker and Joppe suggest that, "The majority of RVs are travel trailers and caravans, although motorhomes, van campers, 5th wheel trailers, and tent trailers are also utilised by RVers" (2013, p. 2). Apart, from these variations in term, there are some interesting differences in the way that caravanning, and camping more widely, operates in different national and cultural settings. Although this paper is principally focused in caravanning and the use of mobile homes for recreational purposes, it will also touch on situations where caravanning overlaps with other outdoor leisure settings (Hardy, Hansen, & Gretzel, 2012), but also where caravans are being used as a form of budget accommodation for the homeless and the poor. In the UK, it is estimated that there are 525 000 touring caravans, 114 000 motor homes, 327 000 caravan holiday homes and 112 000 residential-park homes (NCC, 2014).

Economic significance

The caravan industry contributes approximately £6 billion to the UK economy (NCC, 2014), employing in the region of 115 000 people in full and part-time roles, covering both the manufacture of caravans, and the operation of caravan parks. There are two major UK membership organisations. The Caravan Club specifically represents mobile home users and has approximately 375 000 members. The Camping and Caravanning Club is a little larger, with around half a million members, but these embrace a wider array of activities associated with outdoor hospitality (Brooker & Joppe, 2013). Over 1.5 million people in the UK are said to regularly take holidays in caravans and motorhomes (NCC, 2014). Caravanning is therefore, a major strand of UK tourism. Collectively, camping and caravanning accounted for 15.9 million vacations in 2012 according to Mintel (2013). 69.9 million nights away from home were spent on camping and caravanning trips, accounting for 19% of all nights away from home (including business and leisure), in the UK. Camping and caravanning is the fourth largest accommodation venue, after staying with friends and relatives, self-catering and hotels/guest houses, though this position changes when business travel is disaggregated from the hotels/guest houses sector. Thus, when considering nights away for leisure purposes, camping and caravanning would be the third largest accommodation venue.

Most nights away from home in the UK are associated with leisure activities – 55% of all nights away are linked to holiday whilst 93% (65.2 million) of all camping and caravanning nights away are due to vacations; 52% of these camping and caravanning nights are located at seaside venues; 25% are in countryside and village settings; and the remainder in urban locations. The dominant leisure purpose of camping and caravanning in the UK is reinforced by the fact that 94% of all these nights on campgrounds occur between April and October (NCC, 2014). In 2010, nights spent away from home accounted for £19.8 billion of which £2.3 billion was on camping and caravanning, and 94% of this was on leisure activities (NCC, 2014). In the USA there has been some recent growth in the outdoor hospitality market, Brooker and Joppe (2013, p. 1) report that camping grew from 39.9 million nights in 2011 to 42.5 million nights in 2012. Australasians are said to be the most committed campers, with researchers reporting that 86% of Australians and 80% of New Zealanders have visited an outdoor holiday venue at least once in their lifetimes (Brooker & Joppe, 2013).

The demand for caravan-based holidays is driven by an array of push and pull factors that have varied impacts in different cultural settings. The Mintel report (2013), looking specifically at the UK, shows that recent holiday experiences are pushed by budgetary considerations amongst a significant group of consumers. This has increased the number of holidays taken in the UK, and led to fewer holidays being spent overseas. On the other hand, the impact of poor weather has reduced the number of holidays taken outdoors. There is general support for outdoor vacations, although these will be pulled by different sets of values amongst consumers. For some, the outdoors represent a perception of clean air and open spaces, associated with a principled return to the open country-side as a consequence of city dwelling, pollution and confinement (Sijtsma, de Vries, van Hinsberg, & Diedriks, 2012). For others, caravanning and camping denote holidays that are a more affordable option during hard times. Indeed the Mintel (2013) report suggests that outdoor vacations have increased in response to the economic downturn, growing unemployment, and static wages. In the British context, the essential pull factors of the perceived health and lifestyle benefits of the return to the great outdoors, together with the lower cost value of camping and caravanning are modified by the weather experiences (McCabe, 2009). The trends shown in Table 1 confirm these factors, as recent gains in market have been lost due to poor weather in the summer months of 2012.

The sector experienced steady growth between 2007 and 2011 as the number of trips rose by 6.5% from 15.9 million to 17.00 million in the domestic market responding to recessionary pressures. A significant proportion of the consumers substituted lower cost UK-based, out-door holidays for pre-recessionary international commercial settings. This growth in domestic camping and caravanning was all but wiped out by 2012, as domestic camping and caravanning dropped back to an estimated 15.9 million trips (Mintel, 2013). In 2012, the UK in general experienced its second wettest year, and England specifically suffered the wettest year since formal national records were started in 1910. Mintel's report (2013) suggests that these holidays dropped from a peak of 17.8 million trips in 2009, as the weather conditions deterred a significant number of the less committed camper/caravanners, and there was a higher than usual number of cancellations at these holiday locations. Within the wider market, domestic holidays fell by 1.7%, and camping and caravanning under-performed the market significantly. In this same year, overnight trips rose by 4.5% whilst other forms of service accommodation rose by 1.2%. Mintel reports that the sector has fared less well in each of the past five years, with the exception of 2009 when camping and caravanning increased by 21% compared with a 17% increase in domestic trips, in response to what the report calls, "a flight to value" that benefitted the sector in particular. Finally, the Mintel report highlights some interesting global figures, though the conflation of camping and caravanning does suggest a uniform response to the push and pull factors. This suggests the need for a more informed understanding of the varied responses to both the "flight to value", and the "flight from the weather" between campers and caravanners.

Campgrounds

The outdoor hospitality park sector resembles the wider commercial accommodation sector in that it is dominated by small firms operating a single venue, with a few large firms managing multiple sites. Mintel (2013) quotes figures provided by the trade association. British Holiday & Home Parks Association estimate there are 4 000 holiday parks in Great Britain, providing approximately 530 000 pitches. These would incorporate sites used for a variety of holiday types, that is, for fixed and temporary leases, and for tents and caravans.

The large corporate owners command the static caravan sector, incorporating permanent dwellings in the form of holiday homes and park homes. These sites are predominant in the holiday lettings market as they offer a wide array of facilities and services that provide added income to the static caravan leasing revenue. In addition, many of these parks will offer sites for temporary visitors in camping and caravanning formats. Table 2 lists the major holiday park operators, and it confirms the nature of the park operator supply. The fourteen park operators with more than two sites own 201 of the 4 000 holiday campgrounds.

In terms of revenue and customer numbers Haven Holidays is the largest of the UK holiday park operators, but the Park Resorts portfolio controls more actual sites across Great Britain (Mintel, 2013). Bourne Leisure owns Haven Holidays, and also runs Butlin's Holiday Centres and Warner Leisure Hotels. The third largest holiday park operator, Parkdean Holidays, has regionally focused sites in the south/south-west of England, south Wales and Scotland. Many of the other larger park operators are regionally focused around the south-west of England, south Wales, the Lake District and Scotland (Fidgeon, 1983). This concentration of ownership in a small number of large operators is shown to be more intense when their share of total pitches is considered. The fourteen operators listed in Table 2 control approximately one third of all UK camping and caravanning pitches.

Table 2: Leading UK holiday park operators, March 2013

Operator	Sites
Park Resorts, Ltd	39
Haven Holidays	35
Parkdean Holidays	24
Park Holidays UK, Ltd	23
John Fowler Holiday Parks	14
Darwin Holiday and Leisure Parks	14
South Lakeland Parks, Ltd	9
Haulfryn	7
Forest Holidays	8
Hoburne Holiday Parks	7
Holgates	6
Shorefield Holidays	6
Bunn Leisure	4
Beverley Holidays	3
Total	201

Source: Mintel (2013)

Table 1: Camping and caravanning trips taken domestically and overseas 2007–2012

	GB camping/ caravanning (m)	Index	Overseas camping/ caravanning (m)	Index	All camping/ caravanning (m)	Index
2007	15.9	100	1.2	60	17.1	96
2008	14.7	93	1.6	80	16.3	91
2009	17.8	112	1.9	95	19.7	110
2010	16.3	103	2.0	100	18.3	102
2011	17.0	107	1.9	95	18.9	106
2012(est)	15.9	100	2.0	100	17.9	100

Source: Mintel (2013)

The supply of UK camping and caravanning pitches has remained relatively stable, at around half a million, for some years because of planning restrictions on the development of new sites. As a consequence, much investment by park operators has been in improving facilities and amenities at the holiday parks so as to remain competitive. Initially there appeared to be some cut-backs as a consequence of the credit crunch, but there has been something of a pick-up in recent years. For the larger operators this has been directed at improving competitive advantage through the range of facilities and services on offer to clients. In-door swimming pools, restaurants and bars, children's play areas, etc., have all been added. For smaller operators their development activity has focused on providing more weather resistant stands, improved toilet and shower blocks, and electric hook-up facilities (Mintel, 2013).

Caravanners' profiles and motives

Camping and caravanning represent a major accommodation location in the leisure market in the UK, the third most popular location after "staying with family and friends". The demographic profile tends to cover all age brackets, with perhaps the exception of young adults aged 18-24. The sector tends to be family dominant, as adult couples with children in the family group are the largest segment. Hence the families focus of many outdoor hospitality locations. Couples without children are also a significant group, though their site choices and numbers of sites visited in each trip may be different than for family groups.

Seen from the outside, there may appear to be much uniformity across the typical towed caravan sector. The design has not differed substantially for decades, though the contents have become more elaborate in recent years, and the motorhome has been something of an innovation (Mintel, 2013). The smaller roads in the UK in particular, but across Europe in general have been a limiting factor, but not so constraining in the USA, Australian and New Zealand. That said, the caravanners themselves are quite diverse, with different demographic profiles and with different reasons for travelling, and different travel patterns.

Segmentation issues

The ways of segmenting these groups is also dissimilar. Southerton, Sove, Warde, and Deem (2003) suggest that their interviews with caravanners pinpointed four categories. "*Family fun seekers"* are those who rent static vans, normally at seaside locations. They usually are in family groups, including children, and are looking for a high level of entertainment both on-site and in the surrounding area. They are most likely to be looking for a low cost family holiday in a British location. This group is said to travel abroad for holidays infrequently, and to be more concerned to go to the same, or similar, locations where they are confident about the holiday experience they will receive, and are able to predict how much it will cost. The second group, according to Southerton et al. (2003), are "*activity seeking tourers"* who use caravans as a means of undertaking some other leisure activity. Here the caravan is a means to an end, enabling them to pursue their sporting or special interest leisure activity. The third group they called "*private relaxers*". These might be identified as the closest to our snail metaphor; they holiday in static or touring caravans and do not look for a high degree of entertainment or parks with modern and hotel like facilities. They do not readily look for sociable relations with fellow site guests. They want to keep themselves to themselves and probably avoid campgrounds that are used by families with younger children. The final group they labeled as "*enthusiasts*". These actively engage in a caravanning culture and for them the caravan is an important feature of their leisure time. They are likely to belong to caravan clubs, and attend meetings and rallies with other enthusiasts. The social aspect of engaging with other caravanners is an important part of the perceived benefit of caravanning (Hiemtun & Abelsen, 2012). These are polar opposites to the private relaxers, because the caravan in this back to nature experience is coupled with this communal dynamic.

Southerton et al., (2003) suggest that these market segments are likely to be found on different sites in different geographical locations. They quote several of their interviewees holding very negative views about each other. The family fun seekers and the private relaxers in particular, because of their polarity, see each other with antipathy. The fun seekers regard the private relaxers as "snobs"; and the private relaxers consider the fun seekers to be "louts" and "Butlin's types", as they quote one interviewee observing (Southerton et al., 2003: 3). This segmentation data is limited in this research because it does not provide much insight into the demographic segmentation characteristics of these groups, and suggests the need for research to deepen our understanding of the profiles of each of these clusters.

This segmentation of caravanners also impacts on the sites, facilities and designs noted earlier. Given the restrictions on parking a caravan in all but designated campgrounds, the nature of the sites and the facilities they promote to their clients is a means by which caravanners make selections about where to go. At one extreme, the park is highly organised with many on-site facilities; at the other end of the scale the facilities may be little more than a stand for the caravan, and a water tap. At its most basic, "all that distinguishes a site from the field next door is the label on the gate" (Southerton et al., 2003, p. 4).

Brooker and Joppe (2013) suggest a segmentation model that principally divides caravanners by the amount of time they spend in caravans. Short-term caravanners are most likely to be using the caravan for leisure purposes at weekends or for holidays. They cite research from the United States that clusters these leisure campers into five groups: *average, parents*, *partyers*, *soft rugged,* and *extreme*. The *average* segment gives high priority to the outdoor hospitality experience. The implied "back to nature" is a key strand of the appeal, together with the tradition of the tent, the campfire, and mixing with others in these temporary communities. Caravanners in this group have opted for the comfort of the caravan as opposed to the tent but are still driven by these images. Brooker and Joppe suggest there is a contradiction in that, whilst the appeal appears to be for simplicity, these visitors are also interested in facilities and modern conveniences on campsites. The *parent* group, as the name suggests, are families travelling with children. Here the appeal is the perceived healthy benefits of the outdoors, spending time together as a group, in addition to the lower cost of outdoor hospitality. They are typically looking for sites with an array of indoors leisure facilities that act as a refuge when the weather is inclement. *Partyers* overlap with Southern et al's (2003) *family fun seekers*, and are engaging in camping or caravanners as a means of undertaking some other leisure activity, attending a musical festival, etc. The *soft rugged* segment is described as, "mature campers who purposely overcome traditional camping irritations by utilising recreational vehicles, caravans and cabins which act as a home away from home". Again, this compares with the segment described in the Southern et al. model as *private relaxers*. Finally, the *extremes* are usually undertaking outdoor leisure pursuit that involves an activity such as climbing. They typically avoid the more developed campsites and are looking to something perceived to be more authentic and closer to nature.

Brooker & Joppe (2013) suggest two other segments in addition to the short-term segment. Caravanners and campers may also be segmented as full-time and long-term. Full-timers are those who live permanently in their caravan, motor home, holiday home, or park home. These can be further differentiated between those who reside on one site and rarely move, and those living in their caravan or motor home but who do move around. In Australia, some 65 000 live permanently on a campsite, due to a cluster of benefits including lower cost, location, or proximity to family and friends (Newton, 2008). In the UK, there is growing evidence that people are being placed in this form of accommodation as lower cost means of housing the homeless, unemployed, and poor (Brooker & Joppe, 2013). In addition, there are those who live permanently in caravans or motor homes, but who travel around in pursuit of freedom and interest of experiencing the environmental variation found in different locations (McKercher, 2001).

Long-term occupants are those who stay on a park for long periods to benefit from particular seasons and to benefit from, or to avoid, certain locations because of weather or other holidaymakers. In Australia and New Zealand these are called *grey nomads* (Holloway, Green, & Holloway, 2011). They are said to travel north in the winter months and will probably stay at several different locations during their travels. In the USA and Western Europe, *winter snowbirds* (Prideaux, Wei, & Rys, 2001) move to one location and stay at the one site once they have reached their desired location. This pattern of seasonal and long–term uses also occurs in the summer months where caravanners may stay on a park because of proximity to a desired location, during the summer months, using it for both longer vacations and for short breaks (Prideaux & McClymont, 2006). The point is that they all use the caravan or motor home as a semi-permanent home which can be moved, but which is located at the same campsite for a long period (Glover & Prideaux, 2009). Brooker and Joppe also suggest that there are additional long-term occupants who are using the caravan, or other dwelling, on the campsite because they are working locally and who are using this accommodation to meet temporary needs due to availability, location, or its lower cost than accommodation in bed and breakfast, guest houses, or hotels.

Table 3 reproduces the Mintel report findings identifying the numbers who had been on an outdoors hospitality vacation in the past three years. Just over four in ten have taken some form of camping or caravanning holiday. The table indicates that a significant number have engaged in more than one of the activities. Hence those who have used a caravan or motorhome in the last three years are reported by 34% of the 2000 respondents. Though the largest number report having stayed in a static caravan or mobile home, a mere 5% say they have engaged in touring with caravan or motorhome in the past three years and this has to be seen as a minority activity according to the Mintel study. Overall, most British participants have experienced camping and caravanning. Seven in ten have experienced outdoor hospitality at some point. Interestingly, of the 30% in the UK who report never having stayed on a camp or caravan site, the vast majority (24%) state they have no interest in doing so. This is interesting when compared with the high degree of involvement reported by Australians and New Zealanders mentioned above.

The demographic profile of campers identified in the Mintel research suggests that over half of their interviewees under 35 years of age have undertaken a camping or caravanning holiday in the past three years. This amounts to just over four in ten of those aged between 35 and 54 years, and to a little over a quarter of those who are 55 plus. However, camping is much more skewed towards the younger age groups and fewer of the older age groups report having stayed under canvas. Just 6% of those over 55 have stayed in a tent in the

Table 3: Camping and caravanning experience over the past three years (January 2013)

Type of experience	%
Any camping or caravanning in the past three years	43
Camped in a tent	23
Stayed in a static caravan/"mobile home"	20
Camped at a music festival	8
Stayed at a friend's/relative's caravan/mobile home	6
Camped somewhere as part of a backpacking trip	6
Stayed in a towed caravan	5
Stayed in a motor home (i.e. motorised recreational vehicle or camper van)	3
Been on a "glamping" holiday (i.e. stayed in a yurt, eco-dome, Romany caravan, wigwam, etc.)	3
Been on another form of type of camping or caravanning holiday	4
I have taken a camping or caravanning holiday but not in the past three years	27
I have never taken a camping or caravanning holiday but would like to	6
I have never taken a camping or caravanning holiday and do not wish to	24

Source: Mintel (2013)

past three years, which implies that the remainder stayed in a caravan or motor home in one form or another.

In general, camping and caravanning appears to be undertaken by a wide range of socioeconomic groups, encompassing ABs, C1s and C2s with a slightly smaller proportion of DEs. The Mintel reports states: "Camping and caravanning is a 'great leveller', an attraction for some and a deterrent for other, more status-conscious, holiday makers" (2013, p. 72). That said, there are some interesting differences in preferences for the various outdoor formats. Whilst ABs, and to a lesser extent C1s, tend to favour camping as a means of getting back to nature, C2s, Ds and Es are more likely to take holidays on campsites which have one other of the static caravan/lodge formats. They are looking for sites with a good array of entertainment facilities and they are more likely to stay on site rather than touring the local environment. These sites resemble traditional holiday camps. When ABs stay in caravans or other static formats, these are likely to be located in sites with forests, or in rural settings.

The Refuseniks

Almost six out of ten interviewees (57%) who had not taken a camping or caravanning holiday in the past three years included three interesting sub-groups. Mintel suggests "*lapsed campers/caravanners*" are 27% of consumers who have previously been on this form of holiday; "*camping and caravanning refuseniks*" are the 24% of consumers of have not been on a camping/caravanning holiday and have no intention of going on one; and "*virgin campers/caravanners*" represent the 6% of consumers who have never been camping/caravanning, but would like to do so.

The Mintel research explores further the reasons for not taking a camping or a caravanning holiday in the past three years. Almost half of these (47%) say that they prefer to stay in hotels. Another substantial group (38%) say that the lack of comfort puts them off, and another 34% say the weather is a deterrent. There is clear competition from the permanent structures in the form of rented apartments, and cottages etc., as this was cited as a preference by a third of respondents in the Mintel study, and just over one fifth (22%) said the lack of space offered by tents and caravans was also off-putting. Being the wrong age was given as the reason for not taking this form of holiday by just over one in five (22%). This rose to 50% of respondents who are 65, or over. Although these are cited as specific reasons for not taking holidays in this way, they tend to overlap around three broad themes. The limited accommodation structures offered by tents and caravans push consumers to holiday in accommodation that will give them more space, facilities and comfort. The second is the pull factor that hotels and guesthouses offer services where domestic duties such as cleaning and cooking are catered for, and family members can spend time away from these domestic tasks. Thirdly, the weather is a factor that can be a permanent deterrent for some, and a flexible deterrent to those who might go on this form of holiday when weather patterns are favourable. Table 4 highlights an interesting comparison of how these groups respond to the questions asking for their reasons for not taking camping/caravanning holidays.

Table 4 shows some similarities and differences between the various sub-groups. Those who have never been on this kind of holiday and have no interest in going register stronger preferences for staying in hotel and guesthouse accommodation. The lack of comfort, the weather, the work involved and the other campers/caravanners all attract more support amongst this group. The other interesting response in Table 4 is those who had not been on this form of holiday but would like to go on one, stating their reason as being because they could not afford to go. Mintel states, "Some 20% of DEs who have not been camping/caravanning in the past three years cite, 'I couldn't afford to go' as a reason. The minority of adults who have never been but would like to

Table 4: Reasons for not taking camping/caravanning holidays, by sub-group, January 2013. Base: 1 150 internet users 16+ who have not been on a camping/caravanning in the past three years

Sample size	All 1,150 %	I have taken a camping or caravanning holiday but not in the past three years (%) *n* = 546	I have never taken a camping or caravanning holiday but would like to (%) *n* = 129	I have never taken a camping or caravanning holiday and do not wish to (%) *n* = 475
I prefer to stay in a hotel/guest house when I am on holiday	44	43	29	50
The lack of comfort puts me off	38	34	25	47
The weather puts me off	34	32	31	37
I prefer to stay in other types of self-catering accommodation (e.g. cottage, flat, chalet) when I am on holiday	33	38	31	29
I'm the wrong age for this sort of holiday	22	25	6	23
The lack of space puts me off	22	20	14	25
There's too much work involved	18	18	10	20
I wouldn't like being with lots of other people on a camp/caravan site	14	11	8	19
I couldn't afford to go	13	16	21	8
The rising cost of petrol has put me off	6	8	5	5
I prefer to stay in hostel accommodation when I'm on holiday	6	4	9	8
None of these	12	11	16	13

Source: Mintel 2013

go are also more likely to cite this reason" (Mintel 2013, p. 82). They go on to say that around one in four British adults did not take a holiday in 2012. Recent economic conditions and government austerity measures have been said to have pushed more people out of the holiday market over the last few years.

Towards a research agenda

Caravanning is a significant element of outdoor hospitality (Brooker & Joppe, 2013), yet the amount of research undertaken with the specific intention of exploring caravanning and caravanners is limited. This research note has sought to discuss a sample of those studies that have been published, as well as highlight potential gaps in knowledge, and suggest themes for future research.

Theme 1
The Mintel (2013) report covers many common overlaps, but is limited by the fact that its key audience is the outdoors hospitality industry and thereby, those who own and operate campsites. Many of the observations conflate tent-based and caravan-based vacations, with little insight into the latent differences between the two. For example, the report highlights the influence of weather on outdoor hospitality but implies that demand for vacations in tents and in caravans are equally impacted by inclement weather. That may well be, but there is limited detailed evidence of the impact of weather factors on the different groups.

Theme 2
Whilst the Mintel report gives many valuable insights, it can also be criticised for its lack of detail about the caravanners and how they use the various caravan formats. The report does hint at behavioural segmentation as it suggests a range of behaviours for which campsites are used, but these are limited in the detailed linkage of demographic segmentation to the formats. Socio-economic, demographic and family life-cycle issues are examples of some of the factors that are touched upon, but with little detailed evidence of the linkage to use patterns.

Theme 3
The National Caravan Council has an industry profile and builds an important picture of the caravan industry, particularly the caravan supply sector, and thereby campsite accommodation variants. It also offers a website that can be accessed by club members to assist with site locations and plan vocational journeys. Whilst recognising the value of this from an industry perspective, it can also be criticised because of the limited insight it provides of the caravanners and the segmentation of usage, demographics and the key importance of values of those who engage in outdoors holidays. The work of Schwartz (2012) might be useful in this latter topic because it would help establish the importance of the "great out-doors" amongst other influences, to different groups of caravanners. Further research is needed into who does what, how, with whom, and why? Southerton, Sove, Warde, and Deem (2003) do suggest another model for understanding the behaviours of caravanners that can be compared with the Mintel model, but it is limited in scope and coverage. It was undertaken in the north west of the UK and needs to be tested against larger geographical national and international settings.

Theme 4
Whilst this piece has provided some insights from international contexts, it has been concerned principally with the identification of research within the UK. Fundamentally, there is a need to disaggregate outdoor hospitality as it applies to vacations under canvas and those involving the various caravan formats. The impact of weather is clearly an issue, but trends with the various caravan types highlighted by the NCC and the segmentation dimensions of the users also need more detailed research. Segmentation characteristics of different caravanner groups has to be an urgent issue, because the limited studies touched on above tend to define segments using somewhat simplistic behavioural segments, with limited insights into how these are reflections of demographic profiles.

Theme 5
Following from this, studies contrasting and comparing caravanning and caravanners across various international contexts need to be undertaken. The earlier discussion does suggest a number of differences in the way caravanning is used and enjoyed in different national settings. For example, many more Australians and New Zealanders have at some time been on campsite holidays than their British counterparts. Also the usage of caravans and campervans does seem to be different in the UK and Europe than in Australasia and the USA. Hence, in the longer term, there should be an international comparative study of caravanning and caravanners.

Theme 6
Finally, campsite suppliers also offer some interesting research opportunities. The data associated with Table 2 indicates that the majority of the UK's 4 000 campsites are individually owned and operated by entrepreneurs with just one site. Yet just fourteen firms control over 200 campgrounds and over 30% of the pitches. There is therefore a high degree of ownership concentration, with a large number of firms being small suppliers operated, in most cases, by owner managers (Andersson, Carlsen, & Getz, 2002). Like the wider hospitality industry (Lashley & Rowson, 2010) many of these are likely to be "lifestyle entrepreneurs", who are not principally driven to maximise economic gain. Although tangential to the proposed issues associated with understanding caravanning and caravanners, a more informed insight into campground ownership also offers an interesting research agenda.

Conclusions

Whilst the snail metaphor may be a little too flippant for some observers, it does hint at some interesting contradictions in caravanning as a leisure activity. Like tent dwellers and other campground holidaymakers, caravanning represents a strong pull to open spaces, and getting back to nature, with the mobility opportunities of holidaying in a variety of locations along with the lower costs of vacations on these sites. Yet caravanners are getting back to rural settings accompanied by the comforts of home, or at least a representation of the comforts of home.

This paper has suggested that caravanning and caravanners should be disaggregated from research on outdoors hospitality because it encompasses some unique dimensions that are often obscured in some of the major reports conducted by the National Caravan Council and Mintel. These principally industry-focused reports often do not provide enough insights into the market segments and demographic profiles of the caravanners, nor of the campground operators.

The paper has highlighted the need for a series of research studies that initially focus on generating more information about the UK context, but then on moving on to improving understanding of the similarities and differences to be found in different national and cultural contexts. The nature of caravan and motor home formats as well as variations in the occasions in which these are used, and by whom, all offer interesting topics for research contrasting and comparing international contexts.

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