

GLAMPING – CREATIVE ACCOMMODATION IN CAMPING RESORTS: INSIGHTS AND OPPORTUNITIES

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Abstract

Purpose – The purpose of this research is to help camping managers understand new guest needs for innovative accommodation and align their strategic management accordingly.

Design, Methodology, Approach – The study on glamping accommodation was carried out in 19 Croatian campsites in July and August 2015. Written questionnaires were distributed and collected from 472 respondents.

Findings – The findings of this research show that the introduction of glamping, a novel and creative type of accommodation, is creating a new glamping demand. Results indicate that glamping provides a new opportunity for camping managers to win over a new and younger audience, as well as guests who previously tended to stay in hotels and B&Bs.

The originality of the research – Camping resort management is an underexplored area of tourism management and very few scientific papers are dedicated to the study of the camping product. This paper is a contribution to the area of camping management and can be seen as a starting point for further research into camping resort management.

Keywords creative accommodation, glamping, camping accommodation, mobile homes, camping management

INTRODUCTION

In Europe, camping generates 373 million overnight stays (Eurostat, 2017) and for some European countries, including Croatia, it represents one of the most important tourism products. At the same time, as a traditional camping destination for Europeans, the Mediterranean is entering a stage of maturity, or even stagnation and decline, in its life cycle. The aforementioned implies the need for change in development strategies and the introduction of numerous activities that should ensure a strategic turnaround focused on enhancing the competitiveness of the camping industry through innovation, know-how and sustainable development (Ivandić, 2006).

Changes on the European camping market are reflected in changes in camping styles and in the implementation of new business models. Seasonality and innovation have become key challenges for tourism in general. Overcoming seasonality is key to achieving both a more even spread of the economic benefits of tourism and reduced environmental pressure on destinations (UNWTO, 2014).

To be competitive on the discerning tourism market, campsites all over Europe seek to implement innovations and are constantly looking for new and creative types of accommodation that would be weather-independent and help mitigate the impact of seasonality on business performance.

Compared with other types of accommodation, an innovative camping product contributes to the competitiveness of camping tourism and to the competitiveness of a tourist destination. In a competitive tourism environment, freedom and outdoor activities have become the most popular escape for tourists as well as a challenge for the camping business while at the same time becoming “a new kind of venture capital measured not in money but in people’s time and energy” (Danielsson, Fuerth, Larsson et al., 2013). The modern development of campsites is a response to the growing demand for comfortable stays in a natural environment, and the desire to spend time in well-kept dream resorts that are technologically advanced at the same time.

In 2016, 17.4 million overnight stays and 2.6 million arrivals were realized in Croatian campsites, making up 22.40% of the total Croatian overnight stays in that year (Ministry of Tourism, 2017). The satisfaction of guests with Croatia as a camping destination is evident in the consistently growing numbers of guests and overnight stays in campsites and is confirmed by the existing research. The research of the FUR Institute shows that 79% of German guests were satisfied with their holidays in Croatia – a significantly higher degree of satisfaction than in other Mediterranean countries in Italy (74%), France (68%) and Spain (70%), respectively. (Lohman, 2014). The Croatian Tourism Development Strategy suggests that the competitiveness of camping could be enhanced by improving the quality of campsites through the development of family, wellness, luxury and adventure campsites. It recommends the differentiation of campsites by improving, increasing and implementing different types of higher-quality accommodation, especially with regard to existing coastal campsites with ratings less than 4 stars (CTDS, 2013).

New market segments could be attracted through “innovative types of accommodation with a focus on green, health, adventure and experience concepts” (Milohnić, Cvelić-Bonifačić, 2014, 388), in response to changes in tourist behaviour patterns. In addition, the popularity of outdoor activities as a global trend has become an alternative to seasonality. For instance, in the USA, 84 % of campers participate in multiple outdoor activities, with hiking being the most popular activity to participate in while camping (ACR, 2014). To achieve the goals defined in the national tourism strategy as well as in the Strategy of Sustainable Development of Croatia (Ministry of Environment and Energy, 2009) and in accordance with the global trends, Croatia should consider introducing glamping accommodation in campsites as a potential way of enhancing its competitiveness on the discerning tourism market.

This research of the characteristics of glamping guests and their behaviour aims to provide evidence about the new demand for innovative accommodation, which can inform the camping management strategy. Glamping accommodation in camping resorts could be the solution to, and opportunity for, overcoming seasonality and spreading into new market segments among guests who are traditionally not campers. In this study, the words camp, campsite and camping resort are used interchangeably.

1. RESEARCH BACKGROUND GLAMPING – NEW LUXURY IN A NATURAL ENVIRONMENT

For many, camping is the best outdoors activity, but for others it is an unpleasant experience. That is why the tourism industry came up with the idea of making camping an enjoyable, comfortable and well-designed stay in nature and the outdoors (Whitney, 2011). “There are plenty of reasons why camping isn’t everyone’s idea of fun – bugs, wild animals, leaking tents and canned food to name a few. But there is a way to get back to nature without actually rolling around in it. It’s called ‘glamping’” (Mutić, 2010).

Glamping is defined as a type of camping that is more comfortable and more luxurious than traditional camping (Cambridge Dictionary, 2017). A portmanteau of the words ‘glamour’ and ‘camping’, glamping is a new trend in outdoor tourism that combines luxury and nature, comfort and respect for the environment as well as providing exclusivity and uniqueness in offering an accommodation "outside the box", both literally and figuratively (Andrey, Galera, Cabido & Wiskey, 2014).

Glamping is often called 5-star camping. As opposed to small, practical but uncomfortable tents, glamping as a term is most often associated with luxury tents at attractive locations. Glamping needs the wow effect (Loo, 2015). The word *glamping* signifies a type of camping that is more comfortable and luxurious than traditional camping (Cambridge Dictionary, 2017) 'Where nature meets luxury', one of most captivating slogans for glamping, might open a new chapter in global tourism development (Kate, 2011). Glamping owes its popularity primarily to the unusual combination of extravagance in accommodation with a 5-star quality and the peace of the surrounding wilderness (Guardian, 2010).

Glamping experiences encourage entrepreneurs to look for new ways to give their camps an 'extreme makeover' with the help of glamping (Carter, 2011) and to choose glamping as a competitive strategy in their further development. Globally, glamping is recognizable by a series of slogans, and its quick transfer of information (for example via social networks) contributes to global tourism development. (Glamping Hub, 2017)

Although glamping actually goes against the original origin of camping, some believe that glamping is able to attract a new camping market among current hotel and apartment guests who yearn for glamour and comfort, thus combining the best elements of the camping and hotel industries. It is expected that glamping might have a crucial role in rediscovering the attractiveness of camping (Friedman, 2012).

Glamping is becoming a synonym for luxury accommodation that most often takes the form of tents, but it also includes numerous more innovative types of accommodation such as yurts, tree houses and mobile homes.(Glamping.com, 2017). In the USA, more and more camps are leading with innovative ideas, such as the KOA camps (KOA, 2017). Great tour operators such as Vacanceselect (Vacanceselect, 2017) have joined this trend and have included creative arrangements in their offerings.

The general perception is that glamping is totally trending. It is seen as an idyllic holiday with a touch of glamour that guarantees unforgettable experiences (Urlaubsguru, 2017). Its outlook in view of the growing demand for eco-tourism is also emphasized: Eco tourism will become an elite experience for the mega rich... (Hay, 2013). Demand trends guarantee a further positive development of camping.

1.1. History of glamping

The pioneers of glamping at the end of the 19th century were the posh members of the English high society, led by Thomas Hiram Holding, a keen cyclist who wrote a book in 1898 called 'Cycling and Camping in Connemara' (in Ireland). He described the portable camping equipment he had designed and invited enthusiasts to contact him. This led to the formation of the Camping and Caravanning Club in 1901, which today has over 300,000 members (Igoe & Lotus, 2016).

The mass development of camping over the last 50 years, often seen as the development of cheap and simple mass accommodation, has moved away from the initial idea of camping as a stay in nature with appropriate activities. In the new millennium, camping has returned to its values of staying in an exceptional natural environment, but with the new comfort of luxury accommodation that is becoming more imaginative and unusual.

1.2. The outlook for glamping

Camping, and increasingly glamping, is becoming more popular as a choice of holiday. Only in Germany, three million Germans will go camping, and an additional four million will take shorter camping trips (Lohman, Schmuecker & Sonntag, 2017). When on holiday, every fourth guest from Germany is seeking the individuality and privacy of their own apartment or vacation home, and every eighth wants to stay in a type of camping accommodation (recreational vehicle, tent or bungalow in a campsite) (Zwingenberger, 2017).

Staying in camping accommodation instead of using one's own camping equipment has become more prevalent. A 26% increase of revenue from camping accommodation was registered in the USA in the previous year (Haak, 2011). According to KOA, three people in ten stated that they have camped in a full-service cabin (28%) or in a rustic cabin (3%). These results indicate that there may be a changeover in how incoming campers are introduced to camping (KOA, 2016).

The trend of glamping accommodation also affects the development of so-called mobile architecture which has the role of guaranteeing the reception of a great number of visitors whilst minimizing environmental impact through the use of flexible and movable structures (Rucivero, 2012).

The research on glamping as a creative type of accommodation in camping resorts, presented below, is based on the assumption that the data gathered in the research will provide managers with insights into, and opportunities for, creating competitive accommodation.

2. RESEARCH FRAMEWORK

The research of the characteristics of glamping guests, the first of its kind in Croatia, is based on a sample of 472 responses to questionnaires. The respondents were guests staying in mobile homes, glamping accommodation or high-category camping resorts, during the months of June, July and August 2015. The criteria for choosing glamping accommodation and camping resorts are described below.

2.1. Sample

The criteria for selecting the sample of camping resorts for the purpose of this research were, in order of relevance:

- 1.) the quality criteria,
- 2.) an equal geographical distribution of campsites across the Croatian regions and
- 3.) mobile homes or glamping tents larger than 32m².

Choosing a camping resort sample based on quality criteria was carried out so that surveying would be carried out only in camping resorts meeting the following criteria:

- A camping resort with a minimum quality of 4 stars
- Camping resort members of 'Best camping' Croatia (CCA, 2015),
- Camping resort with the BEST award (today's Superplatz) by ADAC (ADAC, 2015)
- Camping resort members of the Leading Campings of Europe (Leading Campings of Europe, 2015),

At the time of the survey, during the summer of 2015, the authors' analysis of the most up-to-date camping guides, together with a telephone survey, established that Croatian campsites have a total of 9,889 mobile homes and glamping tents. Of these, 6,220 were tour operator accommodation units and 3,669 were mobile homes, including glamping that campsites manage independently.

The number of questionnaires to be distributed was determined based on the established number of accommodation units in campsites and the definition of criteria for the selection of campsites and types of accommodation units. A total of 500 questionnaires were distributed and 472 were returned, resulting in a 94 % response rate. After selecting the sample, the regional distribution of questionnaires was defined as the basis for selecting camps, as well as the ratio of distributing questionnaires between mobile homes of tour operators and mobile homes owned by campsites.

The collected data showed that 63% of accommodation in the campsites belonged to tour operators, and 37%, to the campsites so the ratio of questionnaires was defined accordingly. A total of 314 surveys were distributed to guests in mobile homes owned by tour operators, and 186 were distributed to the mobile homes owned by the campsites.

Table 1: Distribution of questionnaires by region

Survey	Tour operators	Campsite-run	Total
Istria	169	102	270
Kvarner Bay	44	36	80
Dalmatia	102	48	150
TOTAL	314	186	500

2.2. Design of the survey questionnaire

The research concerning the properties of glamping demand was carried out in Croatia in June, July and August 2015. The questionnaires were written in four languages (Croatian, English, German and Italian).

The questionnaires were distributed to the top 19 Croatian camps, including:

- four campsites that according to the criteria of the Croatian Camping Association (CCA) are the best Croatian camps and hold the brand 'Best Camping' of CCA (CCA 2015),
- three campsites, members of Leading Campings of Europe (Leading Campings of Europe, 2015) and winners of the BEST award by ADAC
- 12 campsites of a 4-star quality in Istria, the Kvarner Bay and Dalmatia

To minimise the risk of misunderstandings, different language versions of the questionnaire were made available to the participants in the survey.

The survey questionnaire was structured in the following way: five introductory questions, 13 questions relating to the main characteristics of journeys and stays, five questions relating to accommodation costs, three questions regarding the guests' habits and future forecasts and seven questions about the guests' socio-demographic data.

3. RESEARCH FINDINGS

The results of the empirical research are presented below:

The sample of 472 collected questionnaires was filled out by guests of 18 nationalities: 36% of German nationality; 15%, Austrian; 11%, Slovenian; 10.2 %, Dutch; and others.

Fully 80% of all respondents spent their holidays in 4-star accommodation/mobile homes or glamping, with a surface area greater than 32 m². Among the respondents, men accounted for 56 % and women, 46 %.

a) Who are glampers? *Younger & well-educated guests, permanently employed with good incomes.*

The results of the research show that glampers are younger guests: 34 % of participants are 36-45 years old, 26 % are older than 46, and 17 % belong to the 18-35 age group. Glamping guests are well educated; 48 % have higher education, 34 % have further education and 18 % have secondary education. They are permanently employed and have good incomes: 40 % have an income between 3000- 5000 euros per month, 39 % have an income below 3000 euros, and 22 % have an income above 5000 euros per month. Glampers have good occupations: 35 % are clerks, 30 % are managers and entrepreneurs and 35 % are in other occupations.

b) Glamping decision – How and when? *Decisions are affected by age and nationality. The Germans and the Dutch mostly decide on where to travel in advance.*

Most respondents, and among them middle-aged guests (37.5 %), choose a travel destination 4 - 12 months before their arrival. One fifth of respondents decide on where to travel 2-4 months in advance. People aged 36-45 stand out as the group with the largest proportion of “early birds”. Very few guests make travel decisions more than a year in advance.

The Germans (56.5 %) and the Dutch (43.8 %) decide the earliest on where to travel, between 4 and 12 months in advance. Austrians (61.9 %), Slovenes (78.9 %) and Croats (72 %) mostly decide where to travel four or less months in advance.

c) How do glampers travel? *Travelling with one's family is by far the most frequent form of travel regardless of nationality, age and income.*

Respondents mostly travel with families (78.8 %), while 13.9 % travel with partners and 22.8 % with friends. Older travellers travel with their families more than younger travellers do. Sixty-one percent of young travellers (18-35 years old) travel with families as opposed to almost 90 % of individuals belonging to older age groups.

Young adults (18-35 years old) stand out as the age group with the highest percentage of travellers who travel with friends.

d) Do they have previous knowledge of Croatia? *The majority of respondents visited the country in the past, with young adults making multiple visits. The oldest guests remain the most loyal.*

A third of the foreign guests visited Croatia two to five times in the past. A quarter (25.2%) had previously visited Croatia more than five times, and 22.5% of the surveyed individuals were visiting Croatia for the first time. A surprise was the high percentage of young guests (25.3%) who visited Croatia frequently in the past, more than five times. Of the young adults, 24 % were visiting Croatia for the first time and 21.3 %, for the second time. Older guests are the most loyal; fully 67.5% visited Croatia more than twice and 32.5%, more than five times). One quarter of all respondents are first-time guests.

e) Destination & campsite – *Most guests like to explore new destinations in the country they have already visited.*

The results of the research regarding the destination indicate that 55% of all respondents never visited the destination before. Most guests seem to already know the country (Croatia), and they also like to explore new destinations. Most of the young adults, under 45 (60 %), never visited the destination before. In general, three in five families never visited the specific destination before. There is a somewhat greater likelihood of families not having visited the destination before if they have children under the age of 15. The survey showed that the probability of guests visiting a destination for the first time increases with their income. Austrian, Dutch and German tourists like to explore new destinations the most.

f) First-time visitors - *Young adults are the age group with the highest proportion of first-time visitors to the campsite.*

Tourists aged 18 – 35 account for the majority of first-time visitors to a campsite (70% of respondents in this age group stayed in a campsite for the first time) and this fact represents a huge opportunity for the development of glamping accommodation. Thirteen percent of young visitors visited the campsite once before, 16% visited it two to five times and 1% visited it more than five times.

g) Have they stayed in glamping accommodation before? – *More than half of respondents have never stayed in a mobile home in another country.*

Most of the young visitors (55.7%) have never been in a campsite in another country. However, 32.2 % of them have visited another country multiple times.

More than half of all respondents (and the majority of young adults – 65.8 %) never stayed in a mobile home in another country and 38% stayed in a mobile home in another country more than once, while 36% of middle-aged and 33% of older guests stayed in a mobile home in another country multiple times.

With regard to nationality, most of the Dutch tourists surveyed stayed in a campsite in another country; to be precise, 41.6 % stayed in a campsite of another country more than twice. Fully 56.5 % of Germans never camped in another country, 12.4 % camped just once and 15.3 % camped twice. Austrian visitors are the most loyal; 66 % never camped in another country.

According to income, the middle-income group stayed in a campsite abroad most often. Only a fifth of the lowest income bracket group (below 3000 euros) stayed in a mobile home somewhere else more than once.

h) In which type of accommodation did glampers previously spend their holidays?
– *In the past, respondents spent their holidays in a hotel, mobile homes or private accommodation.*

The key question in this research should provide an answer to whether glamping guests are mostly former camping guests or whether they are former hotel or B&B guests who discovered a new and interesting accommodation in campsites. The majority of respondents have spent their holidays before in hotels and B&B, while 47% have already used mobile homes. Of the young people, 49% have spent their holidays in a hotel in the past, and 49% have spent holidays in a mobile home and private accommodation. Also, 24% have stayed in a resort in the past. Respondents of the middle-aged generation have stayed in a mobile home before (55%), but mostly they have stayed in hotels in the past. The elderly mostly stayed in private accommodation in the past, as well as in apartments and hotels.

Fully 41.6% of the Dutch and 33.9% of the Austrians are former campers. Austrians were mostly hotel guests in the past, although half of them also stayed in mobile homes in the past.

German respondents are split between hotel and mobile home guests and 38.8 % have camped in the past. Most of the former campers are among the lowest income bracket group. Almost half of the middle-income group has spent holidays in hotels, apartments or private accommodation. The highest income bracket group mostly stayed in hotels (47%) or apartments in a resort (39.4%). Among those who earned more than 5000 euros a month, the smallest proportion stayed in a campsite before (less than 20%).

The results clearly show that younger and wealthy guests stayed mostly in hotels and B&Bs in the past and that this target audience is a new challenge and a new competitive advantage for glamping accommodation in campsites.

i) How do glampers choose the destination or glamping and what are their values?
Passive vacation, proximity to the beach and price

The reasons for choosing a destination are passive vacation, relaxation and natural treasures, good food and drinks, and new experiences. Entertainment is considered the least important. Food and beverages are considered very important.

When making a decision, glamping guests may value different things. Some examples of values are: proximity to the beach, a sense of privacy and safety in the campsite, informality and a family community.

The importance of factors when choosing a mobile home varies by age: the most important factors for the youngest generation are price, proximity to the sea, shade and air-conditioning; the middle-aged still see price as being the most important factor, while the proximity to the sea is the primary factor of the oldest generation in choosing a mobile home, with secondary factors being price, shade and mobile home equipment.

j) The overall satisfaction of glampers – *The respondents assessed the destination and the glamping accommodation they stayed in with a very high score.*

Overall, the respondents gave the destination they stayed a very high score of 4.13 and the glamping accommodation they stayed in, a score of 4.05. (*1- the lowest score, 5- the highest score*).

The higher the income, the lower are the scores given to the destination and campsite. The Dutch respondents gave the highest scores to the destination and campsites. Out of 472 respondents, 440 have no negative perception of any features of the glamping accommodation.

k) Average length of stay – *The average length of stay is 10 days; it is somewhat higher for families and increases with income and age.*

Guests with families stayed the longest – 10 days on average, while those with a partner stayed eight days on average. Guests with the highest income (above 5000 euros) stayed for about 12 nights, while those with an income below 3000 euros stayed eight days on average.

The youngest guests stayed less than nine days, those in the middle-age and 46+ group stayed on average for 10.5 days.

l) The cost of glamping? – *Accommodation accounts for most of the expenses.*

The average cost of a holiday in a glamping accommodation is 2,700 euros. Out of this, 1,300 euros account for accommodation costs; 795 euros, for food and beverages (F&B) and shopping, and 370 euros, for sport, services and excursions.

m) Glamping is an opportunity – *Most respondents will glamp again.*

Among the youngest respondents, 66 % will glamp again and 24 % do not know yet. This result is very significant for the future management of glamping accommodation. Respondents belonging to the younger generation have embraced this new type of accommodation, even though some were glamping for their first time.

Middle-aged and older respondents find glamping even more appealing. Fully 71.9 % will glamp again (17% of middle-age respondents and 12% of 46+ respondents do not know yet).

Glamping guests are younger and well-educated guests with a steady and relatively high income. They mostly work as clerks, managers and entrepreneurs. Regardless of their age and income, they travel with their families. They make decisions on how to spend their holidays far in advance; this in particular pertains to the Dutch and the Germans. Most are acquainted with Croatia and rate the destination and accommodation highly. The respondents visiting Croatia for the first time are mostly young people, who represent a new market potential for camping resort managers.

Loyalty to a destination and campsite is not as high as high as loyalty to the country, indicating strong inter-destination competition. Most respondents believe they will stay in glamping accommodation facilities again, and the high percentage of young respondents is particularly encouraging.

CONCLUSION

Camping resort management has the task of managing changes to the camping product, which involves keeping abreast of trends and implementing innovative solutions to create an innovative camping product. Glamping as a new and creative type of accommodation is therefore directly connected to creating an innovative service that contributes to the transformation of campsites into camping resorts and represents the symbiosis of the hotel and camping industries.

The study has provided key insights into, and opportunities for, glamping demand and its habits and attitudes, which contribute significantly to the options for implementing new and innovative managerial solutions in camping resorts.

Among the most significant research results is the finding that the majority of respondents had previously spent their holidays in hotels and household accommodations even though a good part of the respondents is familiar with accommodation in mobile homes. This fact proves that, by introducing creative accommodation in a camping resort, there is a chance and opportunity for generating new glamping demand and attracting guests that are not originally camping guests, but had previously stayed in other types of accommodation. The fact that there is an expressed desire for a future glamping vacation tells the campsite management that the development of glamping accommodation has a promising outlook. It can be concluded that the redesign of camping products is conditioned by the trend of seeking to attract young guests to camping resorts and this generates new managerial challenges. Needed are novel managerial strategies, adapted to these changes in the new glamping market and aimed at younger guests with high spending power.

The applicative conclusion resulting from the literature and the survey of Croatian campsites indicates that there is a need for bringing the research results closer to all levels of management. The implications of this research for camping resort management focus on improving the competitiveness of camping resorts and ensuring the stronger implementation of accommodation quality standards. The implications of the research are relevant to the strategic management of camping resorts in the internal choice of the strategic development of the camping service, future competitiveness and sustainable development in the macro environment.

A major limitation for future research is the definition of glamping, since more and more high-quality accommodations, mostly mobile homes, are considered as being glamping accommodation. Since there is no official definition or categorization of glamping accommodation, more campsites tend to call glamping all different types of accommodation, even apartments, lodges, etc. Tour operators sometimes promote glamping accommodation in simple tents and caravans, which are not always

recognized as glamping accommodation. Mobile homes also tend to be more spacious and luxurious but there is no fixed distinction between those that can be considered glamping and those that cannot.

Future research could focus on only one defined type of glamping accommodation, such as tents or a specific type of mobile home. In addition, further research could be conducted to identify the economic impacts of glamping accommodation in the overall competitiveness of camping.

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