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Caravanism as a competitive advantage for tourism in Portugal

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Masters in management

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ABSTRACT

The emergence of caravanism as an alternative to other forms of tourism has been a growing trend in recent years, especially since Covid-19. Many countries, such as Spain, France, Germany, and England, have invested in building infrastructures and promoting policies that allow this activity to be practiced. Currently, there is some uncertainty in the literature about the true benefits of adopting an organizational structure to support this activity, thus giving rise to the relevance of this research, which aims to assess whether it represents a source of sustainable competitive advantage. The VRIO Framework was therefore applied by interviewing caravanists in Portugal, both resident and non-resident, as they have greater knowledge of the subject. In this way, it was possible to conclude that caravanning does not represent a source of sustainable competitive advantage, but leads to a temporary competitive advantage, given that in Portugal the necessary conditions for practicing this activity have not yet been provided. Therefore, the entities responsible for tourism in Portugal should consider caravanism in their promotion strategies to keep the country competitive and maintain its position in the market.

Keywords: Caravanism; Sustainable Competitive Advantage; VRIO Framework; Temporary Competitive Advantage; Value; Rarity; Inimitability; Organizations

SUMÁRIO EXECUTIVO

O aparecimento do caravanismo como alternativa a outras formas de turismo tem sido nos últimos anos, especialmente após Covid-19 uma tendência crescente, muitos países têm apostado como Espanha, França, Alemanha e Inglaterra na construção de infraestruturas e dinamização de políticas que permitam a prática desta atividade. Atualmente, existe alguma incerteza na literatura sobre os verdadeiros benefícios da adoção de uma estrutura organizacional para suportar esta atividade, surgindo desta forma, a relevância desta investigação, que tem como objetivo avaliar se a mesma representa uma fonte de vantagem competitiva sustentável. Assim sendo, procedeu-se à aplicação do Modelo VRIO, através do desenvolvimento de entrevistas a caravanistas, em Portugal residentes ou não residentes, visto que apresentam um maior conhecimento sobre o tema. Desta forma, foi possível concluir que o caravanismo não representa uma fonte de vantagem competitiva sustentável, mas leva a uma vantagem competitiva temporária, visto que em Portugal ainda não foram proporcionadas as condições necessárias para a prática desta atividade. Assim sendo, as entidades responsáveis pelo turismo em Portugal devem considerar o caravanismo nas suas estratégias de dinamização, de modo a manter o país competitivo e a sua posição no mercado.

Palavras-chave: Caravanismo; Vantagem Competitiva Sustentável; Modelo VRIO; Vantagem Competitiva Temporária; Valor; Raridade; Inimitabilidade; Organização

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1. INTRODUCTION

The phenomenon of tourism as a social phenomenon intertwines with human history, despite its recent organization and study. It exhibits a constant evolution over time through processes and models resulting from improvements in transportation, the introduction of new and potential experiences, new products, and services, as well as new environments. These factors have become increasingly critical in the choice of a tourist destination (Wilson, S., & Obrador, P. 2021).

In a scenario of both stability and uncertainty, caravanism emerges as a tourism modality that can take place with overnight parking in any non-prohibitive location or in designated areas, including campsites (Camping Car Portugal, 2023). It has developed in Europe since the 1960s, particularly in the last decade, with the adaptation of commercial vans, either in a craft or industrial manner (Camping Car Portugal, 2023).

This industry has been considered a means of generating wealth in Portugal in recent years, as mentioned in Turismo de Portugal (2023). This growth has proven to be extremely rapid and is not adequately accompanied by a corresponding evolution in the number of facilities to accommodate this type of tourism. Additionally, there is no updated documentation reflecting the competitive advantages that caravanism could bring to tourism in Portugal. The last comprehensive Portuguese report on caravanism was developed by CCDR Algarve (Comissão de Coordenação e Desenvolvimento Regional do Algarve) in 2008, was published by CCDR Algarve fifteen years ago in 2008, pointing to a significant gap in current research and an opportunity to spotlight caravanism nationwide potential.

The main research problem of this dissertation is, therefore: caravanism as a competitive advantage for tourism in Portugal in both social and economic dimensions. It explains the relationship established between tourism and caravanism. The social and economic implications (capacity to stimulate economic growth, preserve cultural and environmental assets, adapt to changing travel preferences, and foster a more resilient and inclusive tourism industry) will be analysed as a global and then national phenomenon. For this purpose, a literature review and documentary analysis will be conducted as a preferred method. It is also considered relevant to establish qualitative methods through interviews, incorporating the VRIO Framework, aiming to produce new knowledge, new ways of understanding social and economic phenomena and, above all, understanding the competitive viability of caravanism (Aghazadeh, 2015; Lopes et al. 2018).

Additionally, it is considered relevant to establish dependent and independent variables. At the core of this investigation is the dependent variable - the Competitive Advantage for Tourism in Portugal. This construct encapsulates the overarching advantage that arises from the integration of caravanism within the country's tourism sector. To gauge this advantage comprehensively, this study will employ a VRIO Framework score, amalgamating assessments of value, rarity, imitability, and organizational aspects.

Finally, this dissertation is divided into seven chapters. The first chapter, the introduction, provides an overview of the presented work, the research problem, highlighting the proposed objectives, and the methodology used throughout the study. The second chapter presents the literature review based on the methods used in this project. In the third chapter, the research methodology is executed, using interviews articulated with the VRIO Framework. The fourth chapter is dedicated to the detailed analysis of the conducted interviews. The fifth chapter is devoted to the discussion and findings, enunciating all the knowledge extracted from the different research methods used in this study. Lastly, in the final two chapters, the main conclusions and limitations are presented.

2. LITERATURE REVIEW

2.1. EXPLORING TOURISM: A GLOBAL & PORTUGUESE PERSPECTIVE

2.1.1. Global Tourism Dynamics

Tourism has established itself as a sector of high importance worldwide. This has been recognized by the work carried out by several global and local institutions, with cooperation work for the development and improvement of tourism, such as the UNWTO (World Tourism Organization), the OECD (Organization for Economic Cooperation and Development), of WEF (World Economic Forum), ETC (European Travel Commission) and, in Portugal, Turismo de Portugal, which characterizes the country as an “authentic and unique, with so much to see, taste, feel and experience”.

According to UNWTO (2023), tourism can help as an effective means for economic integration, diversification, and poverty reduction. Furthermore, locally developed tourism products, partnerships between public institutions and private entities, and sustainable tourism are recognized as relevant means to achieve economic growth, reduce inequalities, improve living conditions in developing and low-income countries, and mitigate their negative impact on the environment and sociocultural level (UNWTO, 2023).

With the expected growth in the Travel & Tourism sector, this industry can be a vehicle for promoting more and better job opportunities, as well as protecting and restoring the planet's biodiversity and creating bridges between people and different cultures, as mentioned in the Travel & Tourism Competitiveness Report 2019 developed by World Economic Forum in 2019. The interconnectedness of tourism with other industries remains a significant driver of economic development, with current analyses suggesting a sustained impact. Recent advancements in technology and infrastructure continue to bolster this relationship. (McKinsey & Company, 2022)

Sustainability has been one of the main factors to consider when it comes to the growth of tourism, namely the efficiency in the use of resources, environmental protection, and climate change. Uncontrolled growth in the industry can lead to significant environmental damage. However, several organizations highlight that tourism can play a crucial role not only in avoiding these environmental costs, but also in reducing those caused by other industries (World Economic Forum, 2019).

Despite improvements across regions, subregions, and income levels, a few challenges remain for the tourism industry. Increased investment in infrastructure is required to

accommodate the forecasted growth in tourism in the coming decade adequately. Additionally, the quality and efficiency of ground transport infrastructure and services have, on average, remained near stagnant globally, posing the risk that future air and ground transport is likely to rise, hurting both the industry and local economies (World Economic Forum, 2019).

Tourism is an extremely resilient and flexible market, as its high diversification in both supply and demand. This resilience was evident when international tourist arrivals grew in Europe despite various negative factors such as terrorist attacks, or when the tourism sector also recovered more rapidly from the 2008 financial crisis than other sectors of the economy (UNWTO, 2023).

There has also been growth in senior tourism, where retirees with stable and moderately high incomes are now able to travel and explore new places (Vicent, D., 2015). The remaining “personas” identified for 2030 are available in annex 1.

Tourism has significantly grown over the last 60 years, contributing to the social and economic development of various destinations. This growth has been fueled by increased investment, which has enhanced local infrastructure, created jobs, and led to the establishment of businesses, all of which are bolstered by tourism revenues. UNWTO acknowledges tourism as one of the largest global economic sectors, with a robust expansion evident in recent years. According to the UNWTO (2022), international tourism is on track to return to pre-pandemic levels by 2024, demonstrating the sector's resilience and potential for continued growth (UNWTO, 2023). Travel & Tourism sector, including its direct, indirect, and induced impacts, accounted for 1 in 5 new jobs created across the globe during 2014-2019, representing 10.3% of all jobs (334 million) and 10.4% of global GDP (US\$ 10 trillion) in 2019 (UNWTO, 2019). International visitor spending amounted to US\$ 1.9 trillion in 2019 (UNWTO, 2019). Tourism contributed to 7% of total world exports in 2019 and 29% of service exports, being one of the world's leading export activities (UNWTO, 2019).

Since 2005, Europe has been the global region attracting the highest number of international tourists (Juul, M., 2015). While inbound tourist arrivals in Europe rose significantly in 2022 over the previous year, they did not catch up yet with pre-pandemic levels (Statista, 2023). Within this region, Southern and Mediterranean Europe was the most popular area for international tourism, recording over 300 million inbound arrivals prior to the pandemic and around 139 million arrivals in 2021 (Statista, 2023). It is also important to note that, based on UNWTO (2023) forward-looking scenarios for 2023, international tourist arrivals could reach 80% to 95% of pre-pandemic levels this year, depending on the extent of the economic

slowdown, the ongoing recovery of travel in Asia and the Pacific, and the evolution of the Russian offensive in Ukraine, among other factors.

The countries contributing the most to tourism revenues through issuing tourists to destination countries are, in ascending order, the United States of America, China, Germany, France, and Italy. In 2019, 59% of international tourist arrivals occurred by air, with 35% by road, 5% by sea, and 1% by rail (UNWTO, 2019).

International tourist arrivals worldwide increased from 809 million to more than 1.4 billion in 2019 (see annex 2), as well as tourism revenues, rising from 701 billion US dollars in 2005 to 1.481 trillion US dollars in 2019 (see annex 2), in real terms, excluding exchange rates and inflation (UNWTO, 2019). According to UNWTO (2023), this trend is justified by the increase in tourist demand, boosted by better air connections, with a greater offer of flights at more affordable prices and with greater ease of entry into some countries. In 2022, the countries with the most international tourist arrivals in the world were France, Spain, the United States of America, Turkey and Italy (UNWTO, 2023). The five countries with the highest tourist revenue obtained in the same year were the United States of America, Spain, United Kingdom, France, and the United Arab Emirates. (UNWTO, 2023).

Europe continues to lead the rebound of international tourism. The region welcomed 477 million international arrivals in January-September 2022 (68% of the world total), reaching 81% of pre-pandemic levels (UNWTO, 2022). This was more than double that of 2021 (+126%) (UNWTO, 2022). Europe remains, according to the latest report - Travel & Tourism Development Index 2021 (Uppink, L., 2022) top-performing region, surpassing the global average in most pillars and being among the best positioned to grow in the coming years. Of the 43 regional economies covered in the index, 32 score above the global average, and 18 have improved their score since 2019 (Uppink, L., 2022). As a global economic and cultural center, the region boasts some of the highest scores for cultural and non-leisure resources, travel to which is bolstered by, on average, a high degree of international openness and quality infrastructure, including the best ground and tourist service infrastructure. Operating in the region is also made easier by leading information and communication technologies and healthcare infrastructure and favourable business, security, human resource, and labour markets, and socioeconomic conditions.

In 2022, there was a record of 1.53 billion nights spent by residents of the European Union, an increase of 10.9 million compared with 2019 (+0.7%) (Eurostat, 2023). Research from 2023 reveals that over half of these stays, precisely 54.5%, were in hotels and similar

accommodations (Eurostat, 2023). Furthermore, a significant share, 20.5%, of overnight stays were in campsites, motorhome, and similar accommodations (Eurostat, 2023).

In 2016, the Europe offered 608 thousand sleeping establishments, 33% of which were hotels and similar, 62% were apartments, bungalows, and chalets, and 5% were campsites and recreational vehicle parks (see annex 3). Campsites and recreational vehicle parks offer the equivalent of 10 million beds (32% of the total), which equates to an average of 351 beds per establishment (UNWTO, 2018). Camping is equivalent to 12% of the total 3.1 billion overnight stays in the European Union. Since camping in France is a recurring form of tourism, this country has 28% of the installed capacity of the entire European Union (UNWTO, 2018). Overnight stays in this type of accommodation grew 29% between 2010 and 2016, driven mainly by international tourists (UNWTO, 2018).

2.1.2. Portugal's Tourism Dynamics

Tourism in Portugal has been recognized nationally and internationally, having been elected the "Best Tourist Destination in the World" and "Best Tourist Destination in Europe" by the World Travel Awards in 2017, 2018, and 2019 (Turismo de Portugal, 2024a). It was also elected as the "Best European Destination" by the World Travel Awards 2020, 2022, and 2023 (Turismo de Portugal, 2024a). According to the current Minister of Economy and the Sea, António Costa Silva (2023), "Tourism is the main driver of the national economy (Silva, A., 2023). In 2009, it had 6.9 billion euros in revenue, and in 2022, 21.1 billion euros (Silva, A., 2023). It's a threefold increase. It's a 'case study' that is due to the excellence of economic operators (Silva, A. 2023).

According to the Travel & Tourism Development Index 2021, Portugal is the 16th most competitive tourist destination in the world (see annex 4) (Uppink, L., 2022). The evaluation of this index considers 17 fundamental pillars that are subsequently broken down into 112 different indicators that assess the country's competitiveness in different areas. On a scale of 0 to 7, Portugal has a score of 4.8 (0.1 points less than in 2019), driven by high levels of safety (6.3 points) and health and hygiene (6 points) (Uppink, L., 2022). Among the various indicators, Portugal had the second-best rating in terms of the provision of good service infrastructure in tourism (Uppink, L., 2022). The main area for improvement is natural resources (Uppink, L., 2022).

Regarding tourism offerings in Portugal, there has been an increase in financial autonomy in 2021 compared to 2020, which was around 24.7% (Banco de Portugal, 2022b). In terms of education, in 2021, the mass of workers with literacy levels up to basic education was 44.13%,

while workers with higher education accounted for only 20.20%, see annex 5 (Degeit, 2023). According to the World Travel & Tourism Council (2022) in 2021 Portugal lost about 92,000 jobs in the "Travel & Tourism" sector. The measures taken by the government to maintain jobs in the sector prevented even more layoffs. From 2013 to 2019, the number of unemployed people decreased by about 51.7%, see annex 6 (Degeit, 2023). With the emergence of COVID-19, the tourism sector was severely affected, causing this number to increase. In 2020, there were about 67,800 unemployed people in Portugal, (+38.4% compared to the same period in 2019) see annex 6 (Degeit, 2023). The average monthly net income of employees in the tourism sector in Portugal was 646 euros in 2011, 702 euros in 2016, (+8.6% compared to 2011), and 848 euros in 2021, (+20.8% compared to 2016) see annex 7 (Degeit, 2023).

In 2022, tourism contributed to 24.4% of Portugal's total service exports, see annex 8 (Banco de Portugal, 2022a), accounting for 15.8% of GDP through generated revenue (Turismo de Portugal, 2023b). These statistical data become particularly relevant when one can observe the growing trend of the weight and relevance of tourism to the national economy. Other trends in tourism in Portugal include the expansion of tourism activity to less traditional months (commonly referred to as the "Low Season"), significant growth in all regions of the country (see annex 9) December 2022 brought an 18.6% increase in tourism revenue compared to the same period in 2021 (Turismo de Portugal, 2021). Furthermore, a growth in tourism revenue surpassing the growth in the number of guests, diversification of emitting markets, and the attribution of various international awards to the country (Degeit, 2023).

According to the analysis by Turismo de Portugal (2023b) overnight stays (in hotels, apartment hotels, inns, resorts, and tourist apartments) increased by 86.7% in 2022, with 67.2% made by non-residents, (+150.8% compared to 2021) see annex 10. The growth in 2022 is largely due to the increase in the flow of tourists from distant markets such as the United States of America (Turismo de Portugal, 2023b). Of the total overnight stays, 65.2% occur only in the regions of the Algarve, Metropolitan Area of Lisbon, and Madeira (Turismo de Portugal, 2024d). Regarding regional asymmetries, 86.8% of the overnight stays in mainland Portugal in 2022 occurred in coastal regions, a trend that has been increasing over the last decade, see annex 11 (Turismo de Portugal, 2024d). In 2022, the main emitting markets that contributed to the number of overnight stays were, in descending order, the United Kingdom (9.1 million overnight stays), Germany (5.4 million overnight stays), Spain (5.1 million overnight stays), France (4.4 million overnight stays), totalling 50.1% of external demand. If the top ten emitters are mentioned (see annex 12), they account for 78% of overnight stays (with the addition of

Brazil, United States of America, Netherlands, Ireland, Italy, and Belgium) (Turismo de Portugal, 2024d).

Tourism revenue in 2022 amounted to 21.1 billion euros, representing a 109.7% increase compared to the same period in 2021 and a 15.4% increase compared to the same period in 2019 (Portugal GOV, 2023). In 2022, 51.80% of revenue came from the emitting markets of the United Kingdom, France, Spain, and Germany (Turismo de Portugal, 2023b).

In 2022, 22.9 million overnight stays were made by Portuguese tourists, highlighting the importance of the domestic market for tourism in the country, see annex 10 (Turismo de Portugal, 2023b).

Turismo de Portugal has actively worked to reduce seasonality in the national tourism landscape through various programs such as Meetings in Portugal, which aims to attract international conferences and corporate events, 365 Algarve, which aims to promote the region and cultural events between October and May, the promotion of religious tourism, and other campaigns to promote the country throughout the year. This issue becomes particularly relevant given the high levels of seasonality that still occur in tourism in Portugal, with an average of 37.8% in 2022 (see annex 9), with the Algarve region reaching 43.9% (see annex 13), and showing a decreasing trend from 2020 to 2022, suggesting that the measures applied have had an effect, with the seasonality index decreasing by 9.5% from 2022 to 2021 (Turismo de Portugal, 2024c).

The strategic plan for tourism in the coming years is dictated by ET27 (Tourism Strategy 2027), a long-term reference for the direction of tourism in Portugal over the next decade. It is important to analyse this strategic context as it will influence the development of the research for this dissertation. This document considers the ten strategic assets of national tourism: people, climate and light, history and culture, sea, nature, water, gastronomy, and wines, artistic-cultural, sporting and business events, well-being, and living in Portugal (Turismo de Portugal, 2017).

ET27 was developed in partnership with various organizations, Turismo de Portugal, and the Portuguese State, through participatory discussions and focus groups with various stakeholders, from which useful insights about trends, strengths, and weaknesses of different regions and markets can be drawn. Since this study is recent and comprehensive, it is relevant to analyse it to better understand the context of tourism, both in terms of supply and demand (Turismo de Portugal, 2017).

From the analysis carried out in this study, several favourable factors for tourism in Portugal stand out, such as the existence of qualified tourist resources and infrastructure to

support their development, the development of tourist offerings, the arrival of new forms of accommodation (caravanism), and the increase in the supply and diversity of tourist animation companies (Turismo de Portugal, 2017). It is also worth noting the growth in various demand indicators, the receipt of various international awards, and the increase in air connections. However, there are some aspects that need improvement, both related to the reduction of seasonality and regional asymmetries, and to better capitalization of companies, qualification of human resources, simplification of bureaucratic work, and better promotion of the destination abroad. In annexes 14 and 15, a complete SWOT analysis of tourism in Portugal is presented, carried out within the scope of ET27 (Turismo de Portugal, 2017).

The document Tourism Strategy 2027 combines a long-term vision with short-term action. Among the various initiatives planned in the action plan for 2017-2020, one stands out as particularly relevant to this dissertation in terms of structuring and promoting offerings that respond to tourist demand, namely the creation of "thematic itineraries/routes with a strong tourist vocation in terms of historical-cultural and/or natural scope, based on national strategic tourist assets," such as the Portuguese Trails (cycling and walking), the Paths of Fatima, the Paths of Santiago, and the Military Tourism Network (Turismo de Portugal, 2017). This shows that caravanism is in line with the strategy outlined for national tourism and in accordance with the needs of the main emitting markets.

It is worth mentioning that most of the existing data are very focused on accommodation units, often counting tourists based on the number of overnight stays, which is a problem for selective information gathering about the caravanism activity.

2.1.3. The Caravanism Phenomenon

2.1.3.1. Definition

According to the official online platform Camping Car Portugal (2023), caravanism emerged in the 1930s to combine transportation with minimal living functionalities, aiming to increase comfort compared to traditional camping with tents, both in terms of assembly and habitability. However, the industrial production and commercialization of motorhomes only began in the mid-20th century with Volkswagen Camper models. In the early 1970s, the first Cappuccino-type motorhomes were commercialized, characterized by a fixed double bed above the driver's cabin (Camping Car Portugal, 2023). In the early 1980s, competition increased in the motorhome production and commercialization market, and the boom of this niche occurred in the 1990s and early 21st century, with the emergence of various manufacturers and new types of motorhomes such as Profiled (like Cappuccino but without the fixed double bed on top) and

Integral (built from scratch instead of being adapted to an existing commercial vehicle) (Camping Car Portugal, 2023). More recently, "especial dormitório" motorhomes, which are converted commercial vans, have appeared (Camping Car Portugal, 2023).

Caravanism is a form of itinerant tourism, not necessarily connected to camping, characterized by mobility, flexible scheduling, a sense of freedom on the road, diversified destinations, and contact with nature, local culture, and history - an exclusive sensation (Camping Car Portugal, 2023).

Due to its high autonomy in terms of supporting equipment (electricity, water, toilet, kitchen, beds, etc.), the motorhome only requires occasional and accessible support facilities during the journeys, such as “Áreas de Serviço para Autocaravanas” (ASA) and “Estação de Serviço para Autocaravanas” (ESA), only needing to go to campsites for camping (Federação de Campismo e Montanhismo de Portugal, 2024). For definition purposes, an ASA consists of a parking area with an incorporated ESA; an ESA consists of at least one point for drinking water supply and the disposal of grey (dishwashing, bathing, etc.) and black (toilet) water (Federação de Campismo e Montanhismo de Portugal, 2024).

According to the European Caravan Federation (2024), in simple terms, a motorhome is a vehicle with a habitation compartment. Unlike the caravan, it does not need a towing vehicle, as it is equipped with an engine itself. This vehicle is therefore the “all-in-one” solution for mobile holidays. Most motorhomes are equipped with a sleeping area, a kitchen, and sanitary facilities. However, there are also particularly compact vehicles without bathrooms. Motor caravans are available in various designs and sizes. Depending on the manufacturer and price range, it also differs in terms of comfort and driving performance (European Caravan Federation, 2024).

2.1.3.2. Socioeconomic Implications

The contemporary caravanism market, expected to grow to USD 66.9 billion by 2030, demonstrates a compound annual growth rate (CAGR) of 13.6% from 2022, according to Grand View Research (2023). This market Trajectory is partly attributable to a market shift in generational interests, where younger demographics, including millennials and Gen Zers, are increasingly opting for caravanism - a travel style that merges the allure for freedom and convenience during their trip (Grand View Research, 2023). This segment not only rents but also purchases caravans, suggesting a long-term commitment to this lifestyle (Grand View Research, 2023).

The cost-effectiveness of caravanism, notably emphasized by the Recreational Vehicle Industry Association (RVIA) in 2018 indicates that caravanism can save up to 64% costs for

four-person travel groups, while it can save up-to 53% for two-person travel groups compared to traditional vacationing methods (RV Industry Association Staff, 2024). Such economic efficiency, coupled with autonomy it affords, positions caravanism as a competitive alternative within the tourism industry, especially significant in the wake of the financial strain caused by the COVID-19 pandemic, according to Grand View Research in 2023.

While the pandemic initially crippled the tourism sector, leading to a precipitous decline in caravanism demand, as the gradual stringent lockdowns have been removed, the demand for caravanism has again picked up pace. The post-pandemic landscape saw a burgeoning interest from international tourists, with early 2022 figures tripling compared to the previous year (Grand View Research, 2023).

According to the SkyQuest report (2024) the North America motorhome market is expected to grow at a CAGR of 17.7% during the 2023-2030. In 2021, Europe dominated the caravanism market, holding nearly half of the market share in 2021 (49.2%), can be attributed to its high disposable income and a culture that prizes vacationing and the huge popularity of tourism catalysing higher expenditures in caravanism pursuits (Grand View Research, 2023).

Additionally, the “Economic Factor of Tourism Camping in Selected European Countries” study conducted by the German Economic Institute for tourism (DWIF) at the University of Munich (2020), provided scientific data on the economic impact and the state of the caravanism industry across Europe. This study encompasses 15 European countries, including Portugal, offering a comprehensive overview of the camping tourism sector across the continent.

The findings reveal that Germany leads in vehicle stock with approximately 589,355 motorhomes, followed by France with 524,800, Italy with 234,400, the United Kingdom with 225,000, and the Netherlands with 127,181. Portugal ranks second to last with just 10,000 vehicle stock, contributing to a total vehicle stock of 2,165,279 across the surveyed countries.

In terms of overnight stays by tourist campers on campsites, France holds the top position with nearly double the overnight stays compared to the second-placed United Kingdom; France accounts for 128 million overnight stays, while the UK has 59.5 million. Italy and Germany follow closely behind. Portugal ranks 11th among the 15 countries, with 6.9 million overnight stays (DWIF, 2020). The total overnight stays by tourist campers on campsites amount to approximately 416.3 million. Multiplying these nights by the basic costs of a campsite (excluding restaurants, retail, etc.) results in an average of €11.50 per capita per day, leading to a gross turnover of €4.787 billion (DWIF, 2020). Adding the expenses of tourist campers on and outside campsites, the average gross turnover reaches €12.613 billion.

Combined, these figures result in a gross turnover of €17.401 billion by tourism campers for overnight stays on campsites. France again contributes the most with €4.7 billion, followed by Germany and the United Kingdom with €2.6 billion each. Portugal benefits from approximately €3 million, which is significant considering the Portuguese market (DWIF, 2020).

Further adding the turnover by tourist campers for overnight stays outside campsites and day trips and considering that overnight stays outside campsites amount to 78 million with an average daily spend per capita of approximately €47, the gross turnover amounts to €3.665 billion. Additionally, day trips outside campsites, totalling 55 million with a daily spending per capita of €42, contribute €2.310 billion (DWIF, 2020). Combined, overnight stays and day trips result in a total of €5.976 billion. Thus, the total gross turnover by tourist campers amounts to €23.377 billion (DWIF, 2020).

Looking at motorhome registrations in Europe in 2019, Germany again leads with 133,847 new and used motorhome registrations, followed by France and the United Kingdom (DWIF, 2020). The total number of new and used motorhome registrations amounts to approximately 467,228, contributing to a total market turnover of €31.5 billion, including maintenance, repair, and equipment costs for the vehicles (DWIF, 2020). In sum, the total turnover of the European camping market is approximately €55 billion, underscoring the significant economic impact of this sector (DWIF, 2020).

While Portugal's contribution to the overall European caravanism market turnover may appear modest, recent data indicate a burgeoning interest in the country's caravanism sector. In 2021, motorhome sales increased by over 24% compared to the same period last year, and by 66% compared to 2019 (iNature, 2023). The same trend applies to motorhome rentals, which were 57% higher than the same period in 2020 between May and August (Notícias ao Minuto, 2022). According to YesCappa, in 2022, the peak months for motorhome rentals in Portugal were June and September, 43% of the rentals were made by Portuguese, while 56% were made from emitting countries, specifically Spain, France and Germany (Sreenarong, K., 2024).

Based on general data from the OLX and published in Marketeer (2022) blog, it was found that the demand for caravans, motorhomes, and related services increased by 29% in 2022, up to April, compared to the same period last year. It is observed that a large majority of consumers are willing to enjoy their holidays in a caravan or motorhome (69%), according to a survey conducted with 1194 users of the OLX portal. They highlight that the main advantages are saving on family vacation trips (42%), encouraging improvised and itinerant tourism (33%), and the ease of traveling with pets (7%) (Marketeer, 2022). These benefits were also emphasized by Abbasi, I. U. (2023) who notes that caravanism has become a popular alternative

to traditional forms of travel, due to its unique advantages. These include cost savings, increased flexibility, and the freedom to explore new destinations.

Recently, a similar activity has emerged known as overlanding, in this context, overlanding refers to a self-reliant, long-distance journey from Point A to Point B, primarily through remote areas on unpaved or unimproved road surfaces. This activity typically involves multi-night camping, although it generally does not offer the same level of comfort as caravanism (Choksey, J. S., 2023).

2.1.3.3. Legal Restrictions in Portugal

According to Federação de Campismo e Montanhismo de Portugal (2024), Camping is not allowed anywhere except in campsites. Unlike caravanism, which assumes mobility, camping involves immobilizing the equipment (whether it's a motorhome, caravan, or traditional tent) and the need for various supporting equipment such as piped water, electricity outlets, communal toilets, communal kitchens, among other possibilities. For legal purposes, it is important to clarify the concepts of "overnight stay," "parking," and "camping" regarding caravanism.

"Overnight stay" refers to one or more people spending the night inside the motorhome, sleeping or awake, in a specific location. "Parking" refers to immobilizing the vehicle in a specific location on the public road according to the parking regulations in force in the Road Code for the vehicle category (usually light passenger vehicles), with the only contact point with the ground being the wheels and not exceeding the motorhome's perimeter (overnight stay is designated during the night). "Camping" refers to the use of support materials related to camping (such as chairs, tables, etc.) as well as going beyond the vehicle's perimeter (using wheel chocks, awnings, open windows, support ladder, etc.) (Federação de Campismo e Montanhismo de Portugal, 2024). In 2021, there were amendments to the highway code (Article 50-A) that significantly restrict the practice of caravanism by residents and non-residents in Portugal.

From Decree-Law No. 102-B/2020, the following is highlighted:

“Article 50-A- Prohibition of Overnight Stays and Parking of Motorhomes

- 1) Without prejudice to the provisions of Articles 49 and 50, the overnight stay and parking of motorhomes or similar vehicles are prohibited outside locations expressly authorized for this purpose.*
- 2) For the purposes of the preceding number, the following definitions apply:*
 - a) "Parking" refers to the vehicle occupying space beyond its perimeter.*

- b) *"Motorhome or similar" refers to a vehicle that has a living space or is adapted for the use of a living space, classified as "motorhome," "special dormitory," or "caravan" by the Institute for Mobility and Transport, I.P.*
- c) *"Overnight" refers to the stay of a motorhome or similar at the parking location, with occupants, between 21:00 hours of one day and 07:00 hours of the following day.*
- 3) *Those who violate the provisions of paragraph 1 are subject to a fine of €60 to €300, unless the violation involves overnight stays or parking in Natura 2000 network areas and protected areas, in which case the fine ranges from €120 to €600."*

Motorhomes and similar vehicles are now prohibited from staying overnight outside ASA's (designated service areas), exclusive zones for motorhomes, and campsites, regardless of the location.

The leadership of Associação Autocaravanista de Portugal, in a 2024 statement, responded to this decree-law by asserting that respect for the freedom to park and legally overnight outside ASAs or camping is a point of honour for caravanism. The association also emphasized the need to create adequate conditions for the practice of this activity (Associação Autocaravanista de Portugal, 2024).

3. RESEARCH METHODOLOGY

This research arises in the context of the burgeoning activity of caravanism in Portugal, which could yield significant benefits if developed through a well-considered planning strategy. The comfort and safety of modern vehicles enable their use throughout the year for a wide array of destinations, catering to the diverse motivations of enthusiasts. In terms of environmental stewardship their environmental impact is considerably lower than that of traditional hotel establishments. This growing form of tourism offers increased freedom and caters to a broad spectrum of motivations, noting that it allows families to enjoy shorter vacation periods in alignment with school holidays.

However, after a consolidated literary consultation on this topic, it was not possible to obtain a rigorous decision regarding caravanism as a competitive advantage for tourism in Portugal. There is a large gap in available data concerning caravanism in Portugal. Nonetheless, evidence from other countries suggests that caravanism has a promising future.

Given the scarcity of data on caravanism in Portugal, the relevance of this investigation arises, aiming to evaluate whether this activity constitutes a competitive advantage in the Portuguese landscape. Consequently, four main research questions were defined, the main objective of which is to assess whether caravanism is a sustainable competitive advantage for tourism in Portugal.

Table 1. Research questions and objectives

Main Issues (Author, Year)	
Research Questions	Research Objectives
UNWTO., 2023 How can tourism sectors worldwide implement sustainable practices to balance economic growth with environmental and cultural preservation?	Recommend sustainable practices for the tourism sector that balance economic growth with environmental preservation.
CampingCar Portugal., 2023 What empirical evidence supports the notion that caravan parking in public spaces does not unfairly compete with traditional camping parks, and how can caravanism be integrated into urban planning?	Evaluate how caravanism can be integrated into urban planning without disadvantaging traditional camping parks.
Vicent, D., 2015 What are the critical infrastructure developments needed in the tourism sector to ensure sustainable growth, and how can stakeholders address the current stagnation?	Identify necessary infrastructure improvements for sustaining tourism growth.
World Economic Forum.,2019 In the wake of the pandemic, how have geopolitical factors influenced regional tourism recovery, and what measures can be taken to ensure a more equitable resurgence across different areas?	Explore strategies for equitable tourism recovery in the post-pandemic era, considering geopolitical influences.
VRIO Framework Key Research Question Would you say that caravanism has a competitive advantage for tourism in Portugal?	
Research Questions	Research Objectives
Value Do you think caravanism offers a unique value proposition for tourists in Portugal?	Understand the caravanism value
Rarity Are there any unique resources or capabilities that caravanism offers that are not available to other forms of tourism?	Understand the caravanism rarity

Inimitability Is it difficult for other forms of tourism to replicate the caravanism experience?	Understand the caravanism inimitability
Organization Does the caravanism industry in Portugal have the organizational structure and processes in place to support its continued growth?	Understand the caravanism organization

Source: Own elaboration

Additionally, to achieve the previously defined research objectives, a qualitative analysis was conducted, based on interviews with caravanism practitioners, tourists, or residents engaged in the activity, primarily located in Portugal. The choice of caravanism practitioners, not limited to tourists or residents, aims to consider different realities, thus enhancing the sample's heterogeneity. This choice also leverages their greater expertise and insights on this activity potential impact on the dynamics and performance of tourism in Portugal.

Eighteen interviews were carried out, a number deemed sufficient to validate a qualitative study sample (Creswell, 1998; Morse, 2000). These interviews, lasting on average 20 minutes, were primarily conducted in the interviewee's motorhome, with consent obtained for recording.

The interview structure comprised two parts and a total of 11 questions. The first part included a brief introduction to frame the context for interviewees, gathering their personal information and travel profile. The second part, the focus of the interview, consisted of 9 interpretative questions, four related to each VRIO Framework requirements, to obtain each interviewee's opinion on whether caravanism constitutes a competitive advantage source for tourism in Portugal. For these questions, respondents were asked to answer in a binary manner (yes or no), followed by a brief explanation supporting their responses. This section also included the four main research questions mentioned above.

Table 2. Objectives, questions, and types of research questions

Research Objective	Question	Question Type
Ensure relevance and sample heterogeneity	1. Full Name Age/Date of Birth Academic Background Professional Status	Descriptive question
Ensure relevance and sample heterogeneity	2. Tourist or Resident Status	Descriptive question
Ensure relevance and sample heterogeneity	3. Type of Caravanning Vehicle Used (rented or owned)	Descriptive question
Recommend sustainable practices for the tourism sector that balance economic growth with environmental preservation.	4. How can tourism sectors worldwide implement sustainable practices to balance economic growth with environmental and cultural preservation?	Interpretive question
Evaluate how caravanism can be integrated into urban planning without disadvantaging traditional camping parks.	5. What are the critical infrastructure developments needed in the tourism sector to ensure sustainable growth, and how can stakeholders address the current stagnation?	Interpretive question
Explore strategies for equitable tourism recovery in the post-pandemic era, considering geopolitical influences.	6. In the wake of the pandemic, how have geopolitical factors influenced regional tourism recovery, and what measures can be taken to ensure a more equitable resurgence across different areas?	Interpretive question

Understand the caravanism value	7. Do you think caravanism offers a unique value proposition for tourists in Portugal? Yes/No and Why?	Interpretive question
Understand the caravanism rarity	8. Are there any unique resources or capabilities that caravanism offers that are not available to other forms of tourism? Yes/No and Why?	Interpretive question
Understand the caravanism inimitability	9. Is it difficult for other forms of tourism to replicate the caravanism experience? Yes/No and Why?	Interpretive question
Understand the caravanism organization	10. Does the caravanism industry in Portugal have the organizational structure and processes in place to support its continued growth? Yes/No and Why?	Interpretive question
Identify necessary infrastructure improvements for sustaining tourism growth.	11. What empirical evidence supports the notion that caravan parking in public spaces does not unfairly compete with traditional camping parks, and how can caravanism be integrated into urban planning?	Interpretive question
Understand the caravanism. competitive advantage	12. Would you say that caravanism has a competitive advantage for tourism in Portugal? Yes/No and Why?	Interpretive question

Source: Own elaboration

4. DATA ANALYSIS

This chapter presents a qualitative analysis relating to the interviews carried out, through data processing and their respective results and comments. This analysis was performed using the KH Coder 3 software and Microsoft Office Excel.

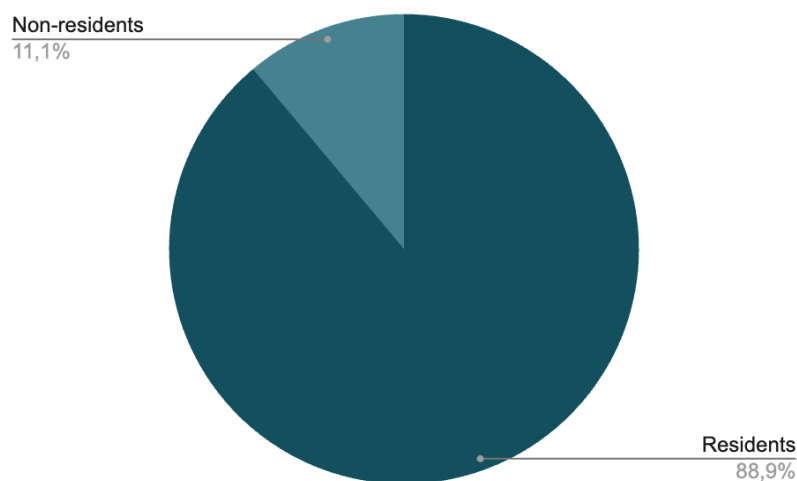
4.1. SAMPLE CHARACTERIZATION

This investigation was developed by conducting interviews with a group of 18 caravanism practitioners, tourists, or residents engaged in the activity, primarily located in Portugal. In this case, the characterization of the sample proves to be extremely important, to guarantee the quality and relevance of the information obtained. Therefore, the sample considered for this study focused on three main aspects: residency status, years of practice, daily expenditure while practicing caravanism, and the number of days spent on activity annually.

4.1.1. Residence

Regarding residency status in Portugal, respondents were divided into two different categories: resident or non-resident. Figure 1. shows that most respondents, 89.9%, are currently residents in Portugal, while 11.1% are non-residents. This is significant as residents have a real perception of the evolution and challenges of caravanism in Portugal.

Figure 1. Residence

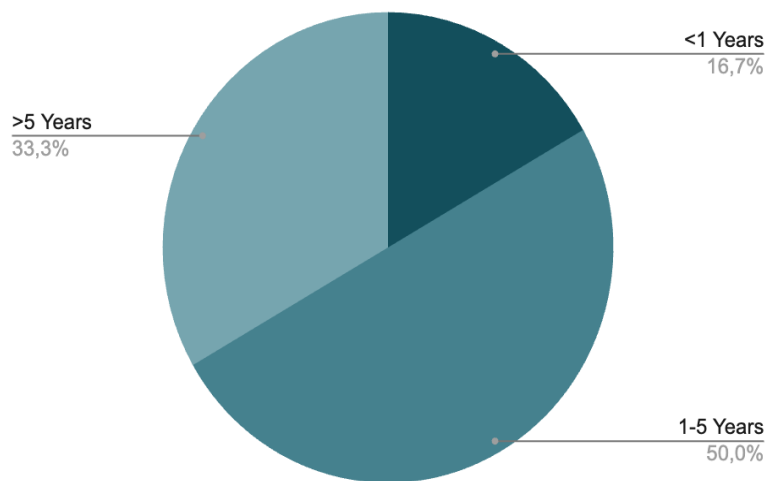


Source: Own elaboration

4.1.2. Years of Practice

Regarding caravanism experience, Figure 2. shows that only three respondents have less than one year of experience. Most practitioners, 83.3%, have more than one year of experience, with 40% having over five years. This indicates a rich analysis due to the significant experience of the interviewees.

Figure 2. Years of Practice

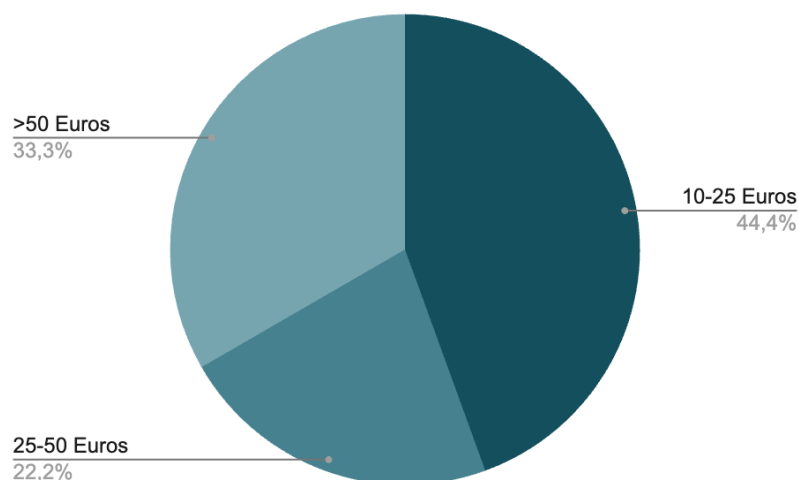


Source: Own elaboration

4.1.3. Average daily expenditure

In terms of daily expenditure, Figure 3. shows that more than half of the practitioners spend over €25 per day, with 33.3% spending more than €50 daily.

Figure 3. Average daily expenditure

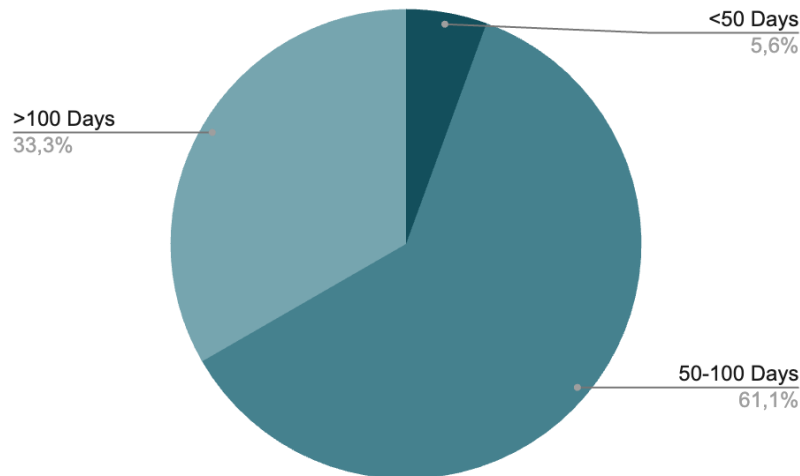


Source: Own elaboration

4.1.4. Average Days Practiced Annually

In terms of the number on average practiced caravanism annually, it is possible to observe on Figure 4. that most practitioners, 61.1%, spend between 50 to 100 days annually on caravanism, with six spending more than 100 days per year. Only one respondent spends less than 50 days annually.

Figure 4. Average Days Practiced Annually



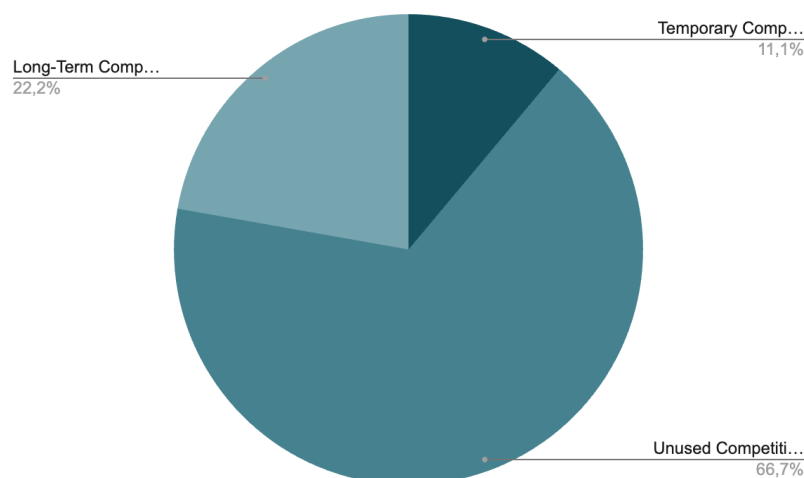
Source: Own elaboration

4.2. VRIO FRAMEWORK

Given the growing trend of caravanism in Portugal and its potential benefits for tourism, as well as some uncertainty in the existing literature on the topic, the VRIO framework was applied. A representative sample of 18 interviewees was analysed to assess whether this activity represents a source of competitive advantage for tourism in Portugal.

After this exercise, and as illustrated in Figure 5., 66.7% of the interviewees considered this activity to result in an unused competitive advantage for tourism in Portugal. Furthermore, 22.2% viewed it as a long-term competitive advantage, while only 11.1%, or two interviewees, saw it as a temporary competitive advantage. In table 3. summarizes all the responses given by the interviewees, and the main reasons identified by them for their response to each of the pillars of the VRIO Framework will then be analysed.

Figure 5. VRIO Framework



Source: Own elaboration

Table 3. Interviews - Answers

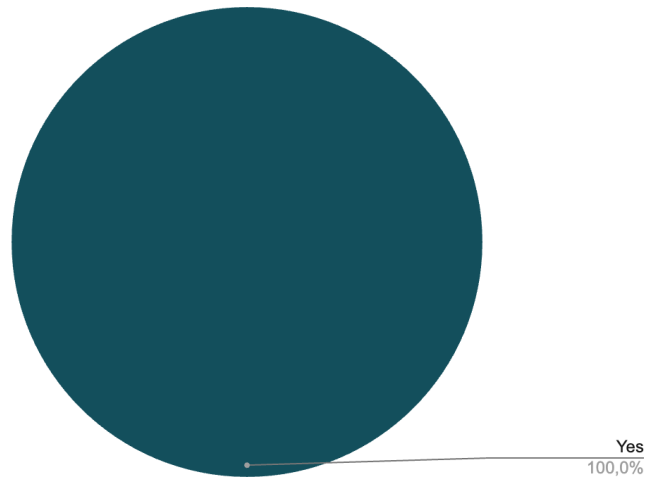
	VRIO Framework			
	Valuable?	Rare?	Hard to imitate?	Organized?
Interviewee 1	Yes	Yes	Yes	No
Interviewee 2	Yes	Yes	Yes	No
Interviewee 3	Yes	Yes	Yes	Yes
Interviewee 4	Yes	Yes	No	No
Interviewee 5	Yes	Yes	Yes	No
Interviewee 6	Yes	Yes	Yes	No
Interviewee 7	Yes	Yes	Yes	No
Interviewee 8	Yes	Yes	No	No
Interviewee 9	Yes	Yes	Yes	Yes
Interviewee 10	Yes	Yes	Yes	Yes
Interviewee 11	Yes	Yes	Yes	No
Interviewee 12	Yes	Yes	Yes	No
Interviewee 13	Yes	Yes	Yes	No
Interviewee 14	Yes	Yes	Yes	No
Interviewee 15	Yes	Yes	Yes	No
Interviewee 16	Yes	Yes	Yes	Yes
Interviewee 17	Yes	Yes	Yes	No
Interviewee 18	Yes	Yes	Yes	No

Source: Own elaboration

4.2.1. Value

Regarding the first parameter of the VRIO Framework, which aims to assess if a particular internal resource generates value for an organization, all interviewees considered that caravanism generates value for tourism in Portugal.

Figure 6. VRIO Framework – Value “Do you think caravanism offers a unique value proposition for tourists in Portugal?”



Source: Own elaboration

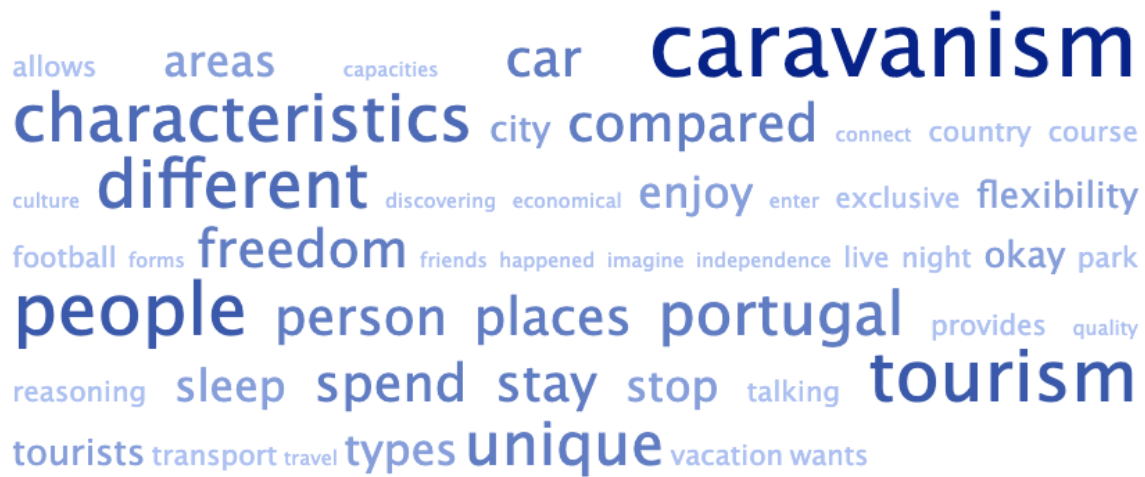
It is relevant to analyse the main explanations provided by the interviewees for this answer. Firstly, using the Word Frequency List and Word Cloud, two text mining tools, it is possible to obtain an overview of the main trends, identifying the keywords most frequently mentioned during the interviews. In this way, it is observed that the most used words were place, people, tourism, unique, different, which becomes quite noticeable as they are words that are associated with the topic in question. Furthermore, it is still possible to highlight words, such as freedom, enjoy, time, exclusive and flexibility, which are several times referred to therefore or cause for which caravanners believe that caravanning generates value for tourism in Portugal.

Table 4. Word Frequency List: Value

Words	place	people; tourism	unique	different; Portugal	compare; freedom; spend; stay	area; enjoy; sleep; stop; time	allow; city; tourist	country; course; day; exclusive; flexibility; leave
Frequency	19	16	11	10	8	6	5	4

Source: KH Coder 3

Figure 7. Word Cloud: Value



Source: Tag Crowd

To frame these words and analyse their relevance with greater degree of certainty, two other text mining techniques, Bigram and Trigram, were used to identify more objective relationships between the words and draw more cohesive conclusions. In this way, analysing the tables below, it is possible to corroborate the previously identified idea of offering a high degree of freedom, as one of the main reasons why interviewees believe caravanism adds value to tourism in Portugal, with this expression appearing frequently in the Bigram. Additionally, it is noted that being a unique activity that "offers a unique value" is significant, as the vehicles allow for sleeping, cooking, and traveling from point A to point B like a regular car.

Finally, another highlighted theme is the increase in "tourists in Portugal," enabling Portugal to attract a higher number of tourists and thereby supporting the local economy.

Table 5. Bigram: Value

Bigram	unique value; value proposition	caravanism offers; offers unique; for tourists; in Portugal; flexibility and; you can; get to; it gives
Frequency	3	2

Source: Own elaboration

Table 6. Trigram: Value

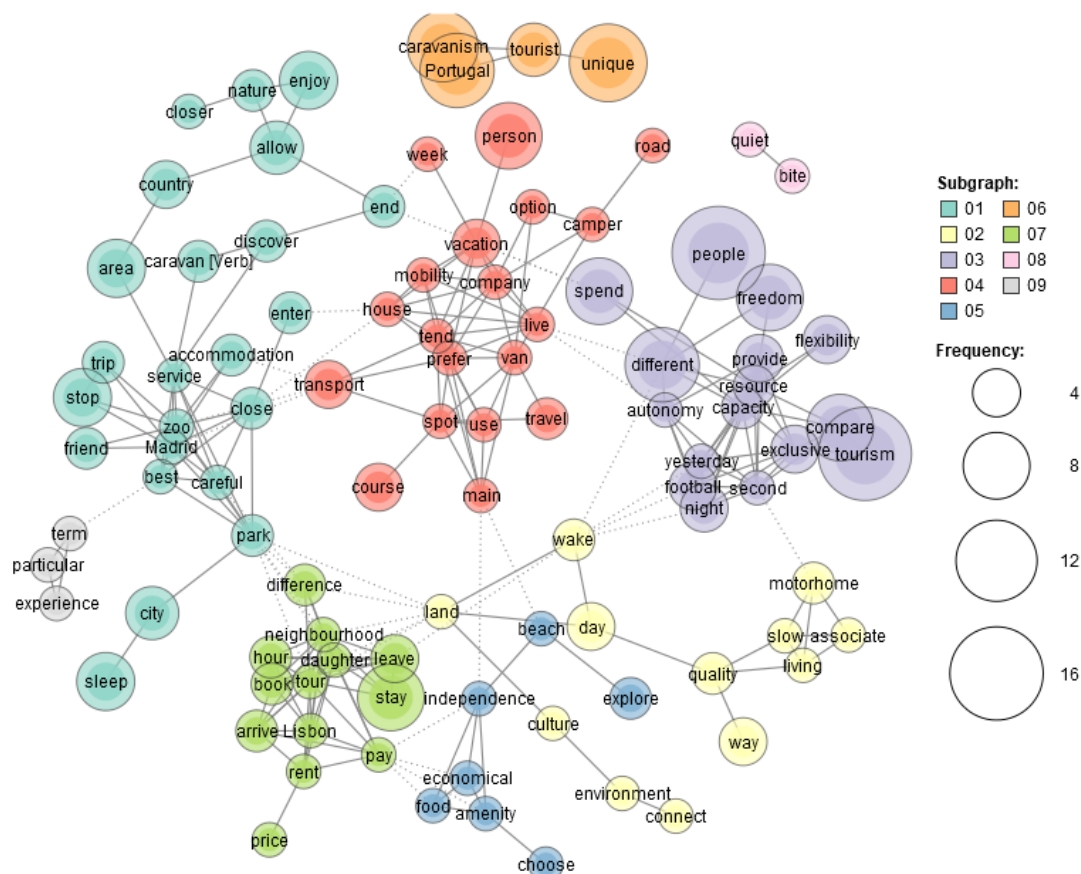
Trigram	unique value proposition	value proposition for; proposition for tourists; for tourists in; tourists in Portugal; caravanism offers unique; offers unique value; it gives you; gives you more;
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		you can get
Frequency	3	2

Source: Own elaboration

Finally, analysing the relationship between concepts, reflected in the Mind Map presented in Figure 8., it is possible once again to observe, in purple, the relationship between being a unique and exclusive activity that benefits users through autonomy, freedom, and flexibility, and a connection with nature justified in yellow using a motorhome. In blue, the relationship between independence, exploration, and economic aspects identified by the interviewees is also visible, with the growing adoption of this activity seen to address financial problems faced by many Portuguese residents in their daily lives.

Figure 8. Mind Map: Value

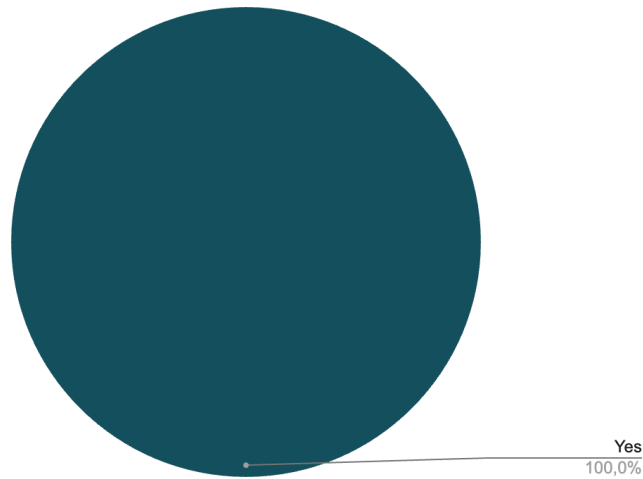


Source: KH Coder 3

4.2.2. Rarity

When asked about the rarity of this activity, 100% of professionals consider that caravanning is a rare activity, with almost no activity with characteristics like this resource. Therefore, this activity is not considered a competitive parity, as no interviewee viewed it as such.

Figure 9. VRIO Framework – Rarity “Are there any unique resources or capabilities that caravanism offers that are not available to other forms of tourism?”



Source: Own elaboration

To justify the responses given by the interviewees, and using the Word Frequency List and Word Cloud, it is possible to highlight words such as people, place, freedom, nature, and self-sufficiency.

Table 7. Word Frequency List: Rarity

Words	people	place	freedom	highway; nature	car; caravanism; contact; road; self- sufficiency; stay	away; beautiful; book; campsite; caravan; cheaper; dependent; easier; food; husband; lifestyle; live; long
Frequency	9	8	6	4	3	2

Source: KH Coder 3

Figure 10. Word Cloud: Rarity



Source: Tag Crowd

Complementing this analysis, through the analysis of Bigram and Trigram, it is possible to identify the difficulty of replicating this activity due to its unique resources, such as more flexibility, self-sufficiency, and being in contact with other people. Furthermore, the Trigram analysis identified that it is "more flexible" "to explore" places that are often not accessible through other forms of tourism, and it is also considered a more open-minded activity.

Table 9. Bigram: Rarity

Bigram	more flexible; unique resources; resources or; self sufficiency; be more; with people; we go; to explore; you can; flexible and
Frequency	2

Source: Own elaboration

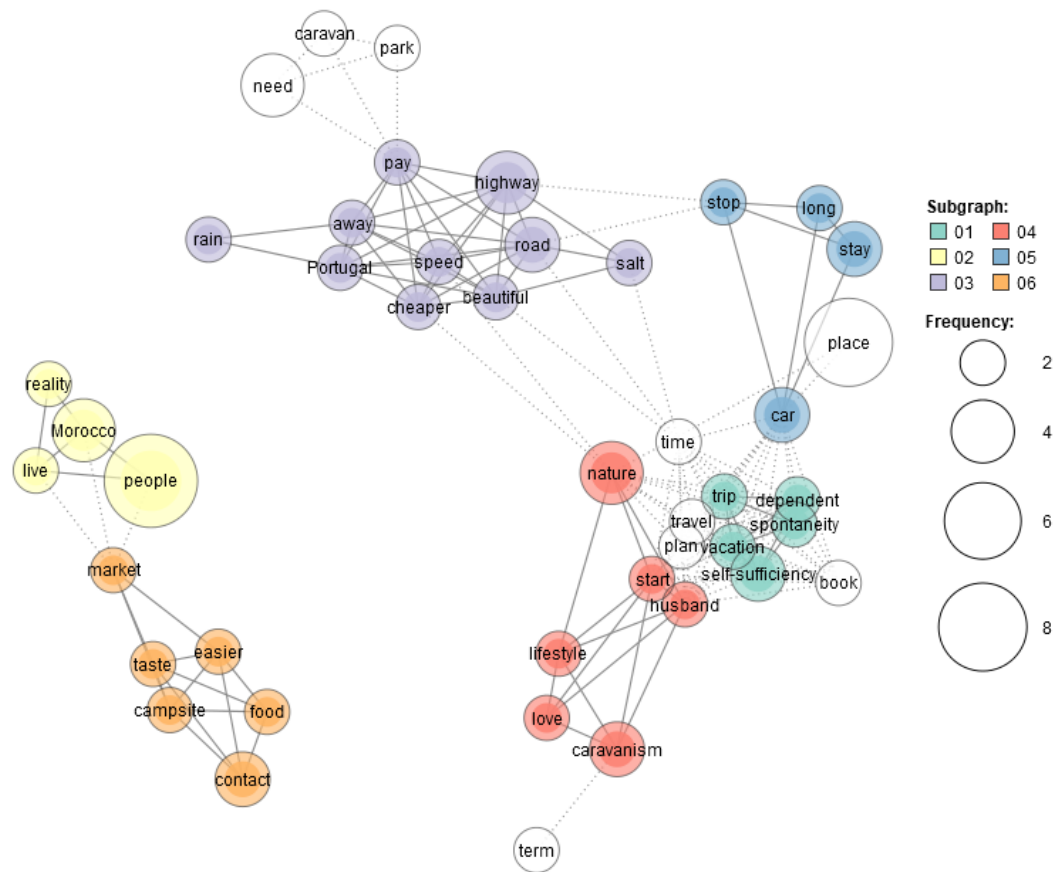
Table 10. Trigram: Rarity

Bigram	unique resources or; resources or capabilities; self-sufficiency of; it allows us; allows us to; it's more flexible; more open minded; more in contact; you can stay; to explore places
Frequency	2

Source: Own elaboration

Finally, by analysing the Mind Map, it is possible to corroborate the previous analyses. In purple, we observe some characteristics that make this activity rare, such as being cheaper than any other tourist activity, which allows, in blue, for long stays, as evidenced in the sample characterization regarding the question: Average days practiced per year. In green, it is also possible to justify the rarity of caravanism as interviewees consider it to be a self-sufficient activity. Lastly, we can see the acknowledgment of caravanism as a lifestyle, which is not observed in other forms of tourism activities.

Figure 11. Mind Map: Rarity

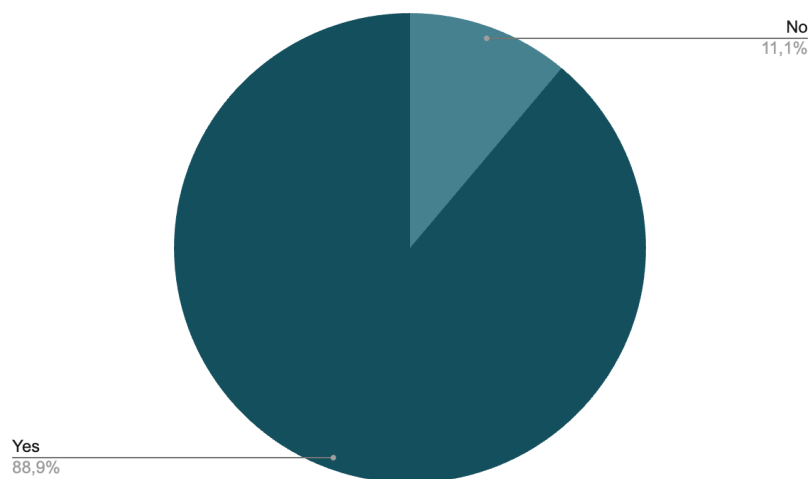


Source: KH Coder 3

4.2.3. Inimitability

When analysing the inimitability of caravanism, 88.9% of caravanism practitioners believe that the activity is not imitable by other forms of tourism.

Figure 12. VRIO Framework – Inimitability “Is it difficult for other forms of tourism to replicate the caravanism experience?”



Source: Own elaboration

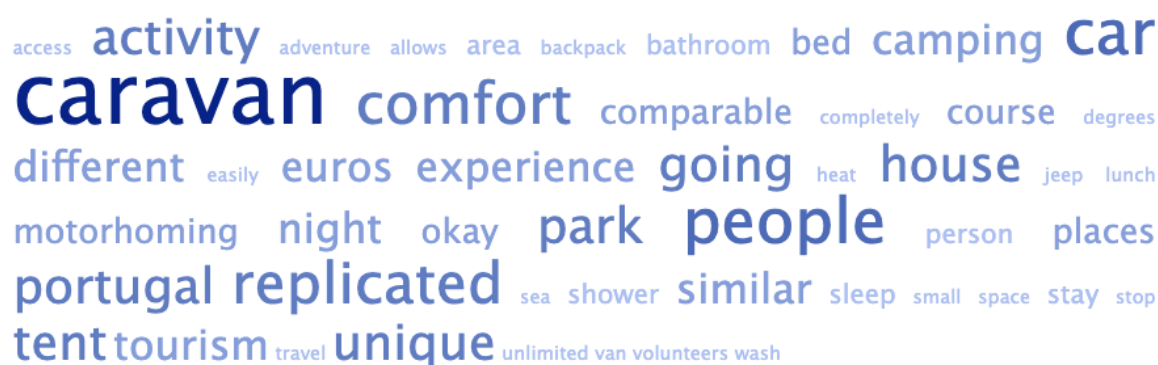
Through the analysis of the Word Frequency List and Word Cloud related to this question, it was possible to observe that words such as people, place, comfort, activity, and house were frequently used by caravanism practitioners, which can explain the main reasons for considering caravanism to be hard to imitate. The interviewees believe that caravanism has characteristics that are difficult to replicate and adjust to the current landscape, thus making it a difficult activity to copy.

Table 11. Word Frequency List: Inimitability

Words	people	place	comfort	activity	house; Portugal	tent; unique	euro; replicate; similar	bed; course night; time; tourism	different; park	allow; area; bathroom; camping; day; experience
Frequency	20	15	13	12	11	10	9	8	7	6

Source: KH Coder 3

Figure 13. Word Cloud: Inimitability



Source: Tag Crowd

When analysing the Bigram and Trigram, the idea of the unique experience provided by caravanism becomes clearer. It is not easily replicable by other forms of tourism, making it an inimitable resource. Additionally, justifications such as the activity being "more comfortable" were presented, comparing it to the comfort of a house.

Table 12. Bigram: Inimitability

Bigram	more comfortable; you can	have the; unique experience; replicate the; caravan experience; to replicate:
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		of the; in the; other companies
Frequency	3	2

Source: Own elaboration

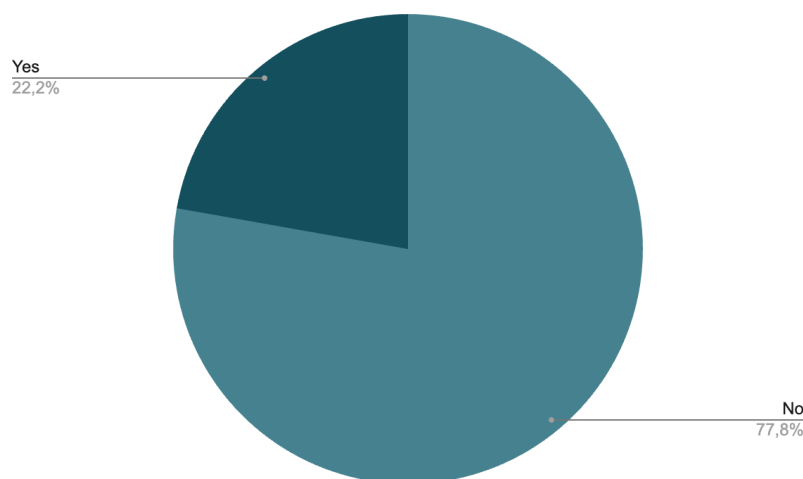
Table 13. Trigram: Inimitability

Trigram	replicate the caravan; the caravan experience; difficult to replicate; to replicate the; is more comfortable; have the comfort; comfort of a	unique resources or; unique experience with; can be replicated
Frequency	2	1

Source: Own elaboration

Finally, through the analysis of the Mind Map, it is possible to corroborate the previously presented ideas. In blue, the difficulty in imitating and replicating this activity by other forms of tourism is reflected. In light green, considering the importance of essential physical elements of caravanism, such as cars and tents, it is highlighted that although similar, tents do not offer the same level of comfort and flexibility. In yellow, the emphasis on flexibility and timesaving provided by caravanism is observed, highlighting the possibility to stop anywhere and the inherent cost savings, unique and hard-to-replicate aspects. Finally, in pink, the difficulty in replicating caravanism due to its unique nature is emphasized.

Figure 14. Mind Map: Inimitability



Source: Own elaboration

Seeking to identify the main reasons mentioned by the interviewees for considering that tourism in Portugal does not have the capacity to organize and enhance the caravanism, an analysis of the word frequency and word cloud was performed. It is possible to highlight words such as people, Portugal, local, and infrastructure, which were frequently used during the interviews. Currently, Portugal does not have the adequate capacity to support the growth of caravanism. The highlighted words indicate significant concern with the lack of necessary infrastructure and organizational structure, such as the construction of more ASAS (also mentioned). Issues like the difficulty of locating and receiving motorhomes, the lack of adequate spaces, and the need for better infrastructure are often mentioned. Furthermore, interviewees recognize that there are countries with better infrastructure for practicing caravanism, mentioning our neighbour Spain as one of the best prepared to meet the expectations and needs of caravaners, promoting sustainable and competitive growth of caravanism in Spain.

Table 14. Word Frequency List: Organization

Words	people	Portugal	place	area	Spain	ASAS; exist	course; park	infrastructure; structure; summer	park; space	country; problem	leave; road; stop	campsite; difficult; locate; necessary; receive
Frequency	29	27	22	20	12	11	10	9	8	7	6	5

Source: KH Coder 3

Figure 16. Word Cloud: Organization



Source: Tag Crowd

Thus, analysing the Bigram and Tigram, it is possible to complement the justifications presented previously. Respondents consider that the caravanism industry in Portugal needs significant improvements, especially about infrastructure and organizational structure. The Bigrams analysis highlights terms such as “caravan industry”, “more infrastructure”, “in Portugal” and “organizational structure” as frequent, reflecting concerns about the country's ability to support the continued growth of this industry. The Trigrams reinforce this perspective, with terms such as “industry in Portugal”, “the caravan industry” and “have the infrastructure” appearing frequently. These terms indicate that respondents see a lack of adequate infrastructure and an insufficient organizational structure as major obstacles.

Table 15. Bigram: Organization

Bigram	caravan industry	more infrastructure; in Portugal	the infrastructure; have the; organizational structure; industry is; for the; are not; growth in
Frequency	5	4	3

Source: Own elaboration

Table 16. Trigram: Organization

Trigram	industry in Portugal	the caravan industry; have the infrastructure; the organizational structure; in the summer	the caravan camps; more infrastructure in; caravan industry is; to support its; organizational structure and
Frequency	4	3	2

Source: Own elaboration

5. DISCUSSION AND FINDINGS

After gathering all the necessary data and conducting the respective qualitative analysis, this chapter aims to identify the main findings for the developed research questions and present their significant contributions to the study. Therefore, in the first place, the responses to the 4 research questions regarding the application of the VRIO framework will be presented.

RQ1: Do you think caravanism offers a unique value proposition for tourists in Portugal?

Regarding the value that caravanism can generate, all interviewees consider that caravanism provides unique value for tourism in Portugal (figure 6). According to a study conducted by the OLX portal and published in Marketeer (2022), the main advantages of caravanism are saving on family vacation trips (42%), encouraging improvised and internment tourism. These were also the main reasons cited in the interviews to justify the added value generated by this activity. Furthermore, interviewees report that caravanism provides mobility, flexible scheduling, a sense of freedom on the road, diversified destinations, and contact with nature, local culture, and history (table 5 and 6), reflecting the ideas advocated by Camping Car Portugal 2023, which emphasizes freedom and flexibility it offers. It was identified that the main benefit interviewees value most is the high level of freedom, which ends up resulting in greater satisfaction by enabling the adaptation of the itinerary according to personal preferences. As mentioned by Grand View Research 2023, caravanism is more than an activity; it is a lifestyle, which was also mentioned by the interviewees. On the other hand, aligning with the idea advocated by Camping Car Portugal 2023, which considers that caravanism enhances competitiveness, this resource, being qualified as valuable, should have been taken into consideration by tourism in Portugal, as it plays a fundamental role in maintaining competitiveness in the market. However, the current trends seem to be contrary to this principle, as the activity is being significantly restricted by Decree-Law No. 102-B/2020.

RQ2: Are there any unique resources or capabilities that caravanism offers that are not available to other forms of tourism?

When assessing whether caravanism possesses unique resources or capabilities compared to other forms of tourism, 100% of the interviewees consider caravanism to be rare (figure 9), thus presenting resources and capabilities not available in other forms of tourism, an “exclusive sensation” (Camping Car Portugal, 2023). The interviewees consider caravanism as a highly unique activity that is difficult to compare with other types of tourism. According to the European Caravan Federation (2024), motorhomes offer an “all-in-one” solution, equipped with a sleeping area, kitchen, and sanitary facilities. All these features, combined with the ability to

move wherever the user desires, result in what many interviewees referred to as a "self-sufficiency" activity (table 9 and 10), or in other words, a mobile home. Additionally, interviewees mentioned feeling as comfortable as they do at home when practicing this activity, experiencing a profound sense of freedom. Beyond these capabilities, caravanism is also mentioned by interviewees to be "more cost-effective" and "more flexible" (figure 11) than other forms of tourism, as highlighted by the RV Industry Association Staff in 2018 for its economic efficiency and the autonomy it provides, positioning caravanism as a competitive alternative within the tourism industry.

RQ3: Is it difficult for other forms of tourism to replicate the caravanism experience?

Regarding the assessment of whether the caravanism experience is difficult to replicate by other forms of tourism, 88.9% of the interviewees consider this activity to be inimitable (figure 12). The interviewees believe that caravanism is hard to imitate by any other form of tourism, such as cruise tourism, air travel, motor camping, bike camping, backpacking, and others. In this context, interviewees also mentioned that caravanism is more comfortable. This idea aligns with points raised by Camping Car Portugal (2023), which aims to enhance comfort compared to tent camping, both in terms of setup and liveability. Lastly, interviewees mentioned that the activity most closely resembling caravanism is overlanding, which involves a 4x4 vehicle capable of navigating rough terrain over long distances, typically equipped with a roof tent (Choksey, J. S., 2023). However, the main differentiation between these activities is comfort, where caravanism comes out on top.

RQ4: Does the caravanism industry in Portugal have the organizational structure and processes in place to support its continued growth?

The final objective of this research is to evaluate whether the caravanism industry has the capacity to organize itself structurally to support its continued growth. In this regard, 77.8% of the interviewees believe that caravanism does not have the necessary structure to organize itself effectively to enhance this activity in Portugal (figure 15). They consider there is still room for progression to maximize the potential of caravanism in Portugal, as it has experienced a recent boom in the country. Interviewees also view caravanism as a competitive factor that should be a focus in Portugal's tourism sector. It was identified that significant investment efforts have been made, but these efforts still fall short of expectations.

Moreover, the primary challenge for caravanism lies in existing legislation, which often does not facilitate the practice of this activity with the freedom that is central to caravanism. Another identified issue is the lack of infrastructure in Portugal compared to other European countries such as Spain, France, Germany, and England, which offer better conditions for

caravanism. This disparity includes both volume-related aspects, few spaces available for caravanism practice, especially along the coastal areas and quality-related aspects, with many existing spaces being inadequate, outdated, or in poor condition.

Therefore, after analyzing the four pillars of the VRIO Framework individually and applying it universally to caravanism, thus answering the key question of this research, caravanism does not represent a source of sustainable competitive advantage for tourism in Portugal. This conclusion stems from the majority view among interviewees that caravanism is not being effectively explored by the entities responsible for tourism in Portugal. However, the activity itself was considered valuable, rare, and inimitable by the interviewees, as shown in Table 17. Therefore, while exploring this activity currently may yield competitive advantage, without creating favourable conditions for caravanism (Associação Autocaravanista de Portugal, 2023), it will only provide temporary competitive advantage due to the current boom. In the long term, caravanists may opt for other countries that better facilitate this type of travel experience, thus missing out on the potential Portugal has to offer to these travellers.

Table 17. VRIO Framework: Results Obtained

Valuable?	Rare?	Hard to imitate?	Organized?		Results obtained
No	-	-	-	Competitive Disadvantage	0,00%
Yes	No	-	-	Competitive Parity	0,00%
Yes	Yes	No	-	Temporary Competitive Advantage	11,11%
Yes	Yes	Yes	No	Temporary Competitive Advantage	66,67%
Yes	Yes	Yes	Yes	Sustainable Competitive Advantage	22,22%

Source: Own Elaboration, adapted from Barney (2002)²

In this sense, and having presented and justified the generated value, rarity, and inimitability of this activity, it becomes important to address the organizational structure associated with the practice of this activity in Portugal. Regarding this issue, as previously highlighted when Portugal is compared to other countries in Europe, it lags far behind in terms of the volume and quality of organizational infrastructure. In terms of volume, changes to the highway code came into effect in January 2021, published in the *Diário da República* (2020). This decree (Article 50-A) aimed to prohibit overnight stays outside designated service areas (ASA's), regardless of the location, directly affecting the freedom that is closely associated with this activity. It is also important to note that overnight stays in motorhomes were already prohibited in many places, particularly in all protected areas. This situation worsens when interviewees mention that in the absence of places to sleep (outside ASA's), traditional

campsites are never an option due to their lack of conditions (infrastructural quality) and high costs.

The great beauty of caravanism lies in its diversity, appealing to people from 8 to 80 years old, offering affordable vacations to those who may not have many financial possibilities, allowing everyone to set their own travel pace and choose where to go and where to stay overnight. The practice of caravanism has been evolving, yet regulations have not kept pace with these changes. Additionally, there has been an increase in the number of converted motorhomes traveling across Portugal, both by residents and non-residents, mainly from Spain, France, Italy, and Germany (Sreenarong, K., 2024), attracted by the country's natural beauty, ease of travel (until recently with motorhomes), and low cost of living. All these factors, along with increased interest among residents in traveling by motorhome, have significantly increased pressure in some areas. This pressure often results in human waste scattered in natural areas, caused by the lack of bathroom facilities in vans, a problem easily solved with a simple toilet. There is also a scarcity of parking spots for other vehicles in areas where spaces are already limited, challenges posed by the passage of large motorhomes through narrow streets in small towns, and the visual and environmental impact caused by large motorhome clusters.

These impacts are particularly felt in the Southwest Alentejo and Costa Vicentina Natural Park, certain areas in Southern Algarve, some beaches in the West, and other regions in the North. In these areas, there are already rules prohibiting overnight stays, except in some zones in the Algarve, although they are often covered by municipal regulations that also prohibit overnight stays. Increased surveillance is needed in these areas, especially where there are clusters of many motorhomes, and fines should be effectively applied if camping occurs in parking lots or parking on cliffs.

As suggested by interviewees and the caravan community, which has even submitted a public petition, there is a clear need for the creation of support infrastructures for caravanism in these areas, particularly parking lots (Associação Autocaravanista de Portugal, 2023). These facilities could be paid, with reasonable fees (5-10€/day with services), depending on the location, and with a time limit for staying.

Table 18. Main theoretical and practical contributions

Authors (Year)	Main Topics	Theoretical/Practical Contribution
Camping Car Portugal (2023)	Aiming to define and explain the various aspects of caravanism, including its practices, benefits, and essential guidelines for caravanism enthusiasts.	Caravanism considered valuable, representing a competitiveness factor

Grand View Research (2023)	Highlights the growth of the global caravanism market	Valuable insights into market dynamics and consumer behaviour
RV Industry Association Staff in 2018	Study by CBRE Hotels Advisory Group highlighting that caravanism are significantly cheaper than other forms of tourism	Caravanism promotes family bonding and flexibility while emphasizing cost-effectiveness in travel.
Marketeer (2022)	The rise in demand for motorhome in early 2022	This shift in consumer preferences emphasizes the growth potential in caravanism and need for industry adaptation
Sreenarong, K. (2024)	The rise in demand for motorhome in early 2022	This shift in consumer preferences emphasizes the growth potential in caravanism and need for industry adaptation
European Caravan Federation (2024)	Definition and characterisation of caravanism	The understanding of caravanism by defining its unique characteristics, practices, and benefits, thereby enhancing its recognition as a viable form of tourism
Diário da República (2020)	Motorhomes and similar vehicles are prohibited from staying overnight outside ASA's (designated service areas), exclusive zones for motorhomes, and campsites, regardless of the location	Enforcement of these Decree Law affects the operational dynamics of the caravanism activity

Source: Own Elaboration

6. CONCLUSION

Caravanism represents a temporary competitive advantage for tourism in Portugal. After applying the VRIO Framework to assess whether this activity provides a source of sustainable competitive advantage, it was possible to conclude that caravanism is considered valuable, rare, and inimitable leading to a temporary competitive advantage. Therefore, Portugal should consider continuing to invest in this activity as it is crucial for maintaining competitiveness relative to other countries. Failing to invest could place Portugal at a competitive disadvantage compared to its neighbouring countries.

Regarding the value generated by caravanism, this contributes to the more efficient development of tourism in Portugal by reflecting the needs and expectations of both younger and older generations. It promotes increased satisfaction and provides unique moments through freedom, flexibility, comfort, and low costs. Caravanism also allows Portugal to enhance its ability to attract more tourists, who generally have greater purchasing power than residents and travel from north to south, supporting local economies and businesses not only along the sea front but also in countryside areas, which currently face significant challenges. Furthermore, the ease and simplicity of creating and implementing infrastructure for this activity represent a competitive factor.

Finally, despite caravanism being considered valuable, rare, and inimitable, Portugal lacks the necessary capacity to exploit this resource. As caravanism is still a relatively recent activity in Portugal, caravanists believe there is still room for growth when compared to other countries. Furthermore, they believe that there is no current planning to promote this activity in the country, and they warn of the need for structured planning to achieve sustainable growth.

In this way, considering the value generated by caravanism, the entities responsible for tourism in Portugal must consider this activity into their plans. It is essential for maintaining competitiveness, becoming even more relevant when rarity and inimitability are associated with this activity. In this sense, there should be efforts to turn this resource into a sustainable competitive advantage, including calls for the construction of appropriate infrastructure, favourable laws for caravanism, and, above all, structured planning.

7. LIMITATIONS

During the investigation carried out, and despite the conclusions obtained, some limitations were identified.

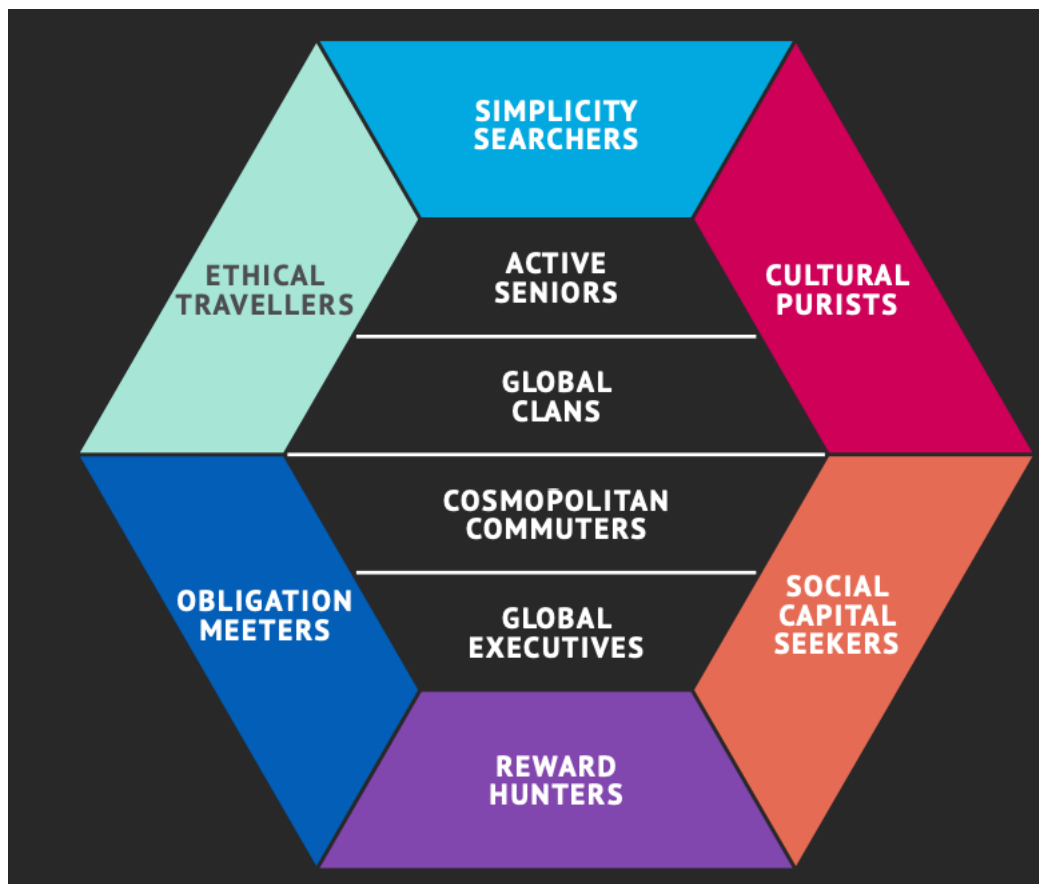
Firstly, there is a significant lack of literature on the topic of caravanism, which hindered the acquisition of relevant statistical data. Secondly, the interviews were carried out exclusively with caravanists, leaving out the opinions of individuals who do not engage in this activity. Thus, the impact of caravanism on the general population is not fully reflected. Furthermore, only 18 caravanists were interviewed, which may not be enough to extrapolate the opinions of the broader population.

Regarding data analysis, the results obtained through the KH Coder tool were not as cohesive as expected, with some difficulty finding relationships between the justifications presented by the interviewees, leaving the idea that certain pertinent points that were mentioned in the interviews were not retracted, as they were not mentioned as regularly in the interviews.

Finally, the last limitation identified involves the lack of specificity in the analysis. During the interviews carried out, several caravanists identified different opinions regarding caravanism, leading to the desire that the application of the VRIO framework could lead to different results being obtained. From the same perspective, the difference that may exist in the dynamism of this activity depending on the interview experience was also reported. Therefore, these may be some of the points to be investigated in the future.

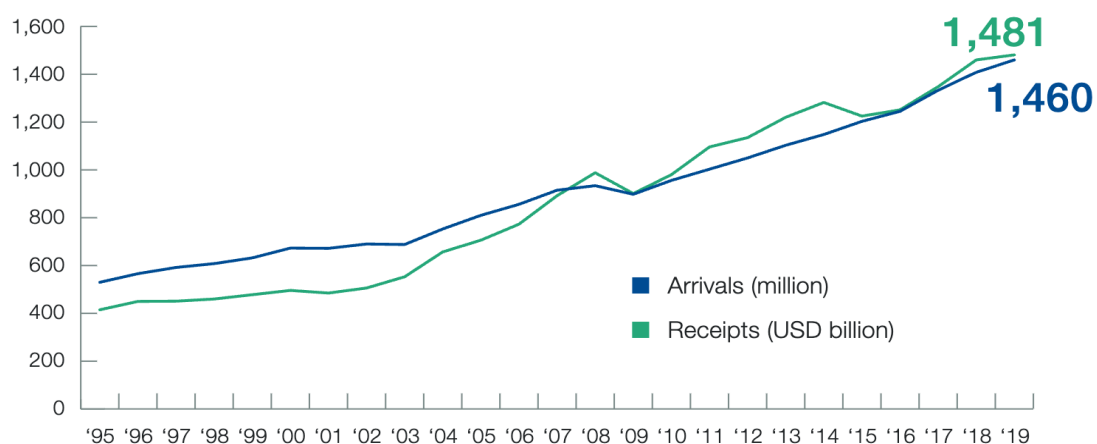
8. ANEXES

Annex 1 –The 6 Tribes for 2030



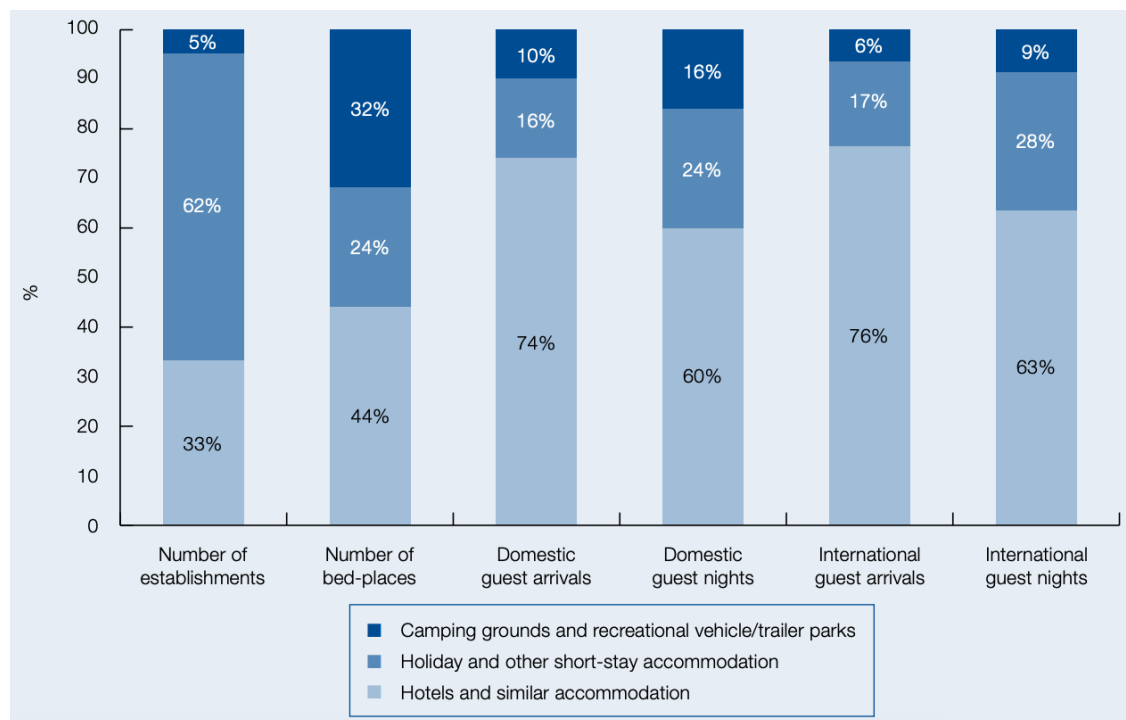
Source: Amadeus

Annex 2- International tourist arrivals (millions) and tourist receipts (USD billion)



Source: UNWTO

Annex 3- Share of establishments, bed-places, guest arrivals and nights by type of establishments in EU, 2016



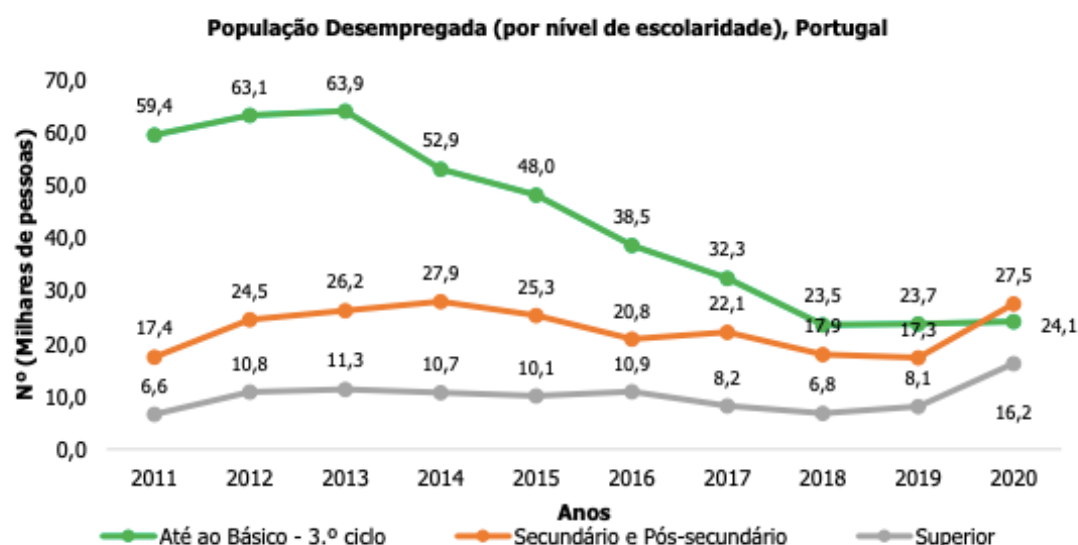
Source: UNWTO

Annex 4 - Travel & Tourism Development Index 2021 overall rankings

Rank	Economy	Score ^a	Change since 2019 ^b		Diff. from TTDI Avg. (%)	Rank	Economy	Score ^a	Change since 2019 ^b		Diff. from TTDI Avg. (%)	Rank	Economy	Score ^a	Change since 2019 ^b		Diff. from TTDI Avg. (%)
			Rank	Score					Rank	Score					Rank	Score	
1	Japan	5.2	1	0.7%	31.8%	40	Mexico	4.3	-6	-1.2%	7.4%	79	Cambodia	3.6	3	1.1%	-9.2%
2	United States	5.2	-1	-1.0%	30.7%	41	Bulgaria	4.3	-2	-0.4%	7.3%	80	Tunisia	3.6	-3	-0.5%	-9.2%
3	Spain	5.2	2	0.0%	29.5%	42	Lithuania	4.3	3	0.6%	7.2%	81	Tanzania	3.6	5	2.6%	-10.2%
4	France	5.1	2	-0.2%	28.8%	43	Qatar	4.3	-2	-0.2%	7.0%	82	Cape Verde	3.6	1	1.4%	-10.2%
5	Germany	5.1	-1	-1.8%	27.3%	44	Georgia	4.3	3	1.4%	6.8%	83	Pakistan	3.6	6	2.9%	-10.2%
6	Switzerland	5.0	1	-2.1%	26.0%	45	Turkey	4.2	4	1.3%	6.4%	84	Mongolia	3.6	-8	-2.1%	-10.6%
7	Australia	5.0	1	-1.3%	25.6%	46	Croatia	4.2	-4	-0.6%	6.4%	85	Trinidad and Tobago	3.6	0	1.5%	-10.7%
8	United Kingdom	5.0	-5	-4.5%	24.8%	47	Israel	4.2	-7	-1.0%	6.2%	86	Kuwait	3.5	-7	-1.8%	-11.0%
9	Singapore	5.0	0	-1.4%	24.6%	48	Latvia	4.2	0	0.6%	5.9%	87	North Macedonia	3.5	-3	-0.3%	-12.1%
10	Italy	4.9	2	0.8%	23.9%	49	Brazil	4.2	3	2.3%	5.2%	88	Namibia	3.5	0	0.0%	-12.6%
11	Austria	4.9	0	0.4%	23.6%	50	Costa Rica	4.2	1	1.2%	4.5%	89	Rwanda	3.5	1	0.7%	-12.7%
12	China	4.9	3	2.3%	23.5%	51	Egypt	4.2	6	4.3%	4.4%	90	Kyrgyz Republic	3.4	3	1.9%	-13.9%
13	Canada	4.9	-3	-2.1%	22.9%	52	Vietnam	4.1	8	4.7%	4.1%	91	Bolivia	3.4	5	1.6%	-14.5%
14	Netherlands	4.9	0	0.2%	22.3%	53	Romania	4.1	-3	-0.7%	3.6%	92	Tajikistan	3.4	-1	-0.3%	-14.6%
15	Korea, Rep.	4.8	4	1.9%	21.4%	54	India	4.1	-8	-2.6%	3.6%	93	Lao PDR	3.4	1	0.7%	-15.0%
16	Portugal	4.8	-3	-2.1%	19.8%	55	Uruguay	4.1	6	3.6%	3.0%	94	Lebanon	3.4	-7	-3.1%	-15.1%
17	Denmark	4.7	-1	-1.5%	18.9%	56	Slovak Republic	4.1	-3	0.2%	2.9%	95	Bosnia and Herzegovina	3.4	-3	-0.7%	-15.2%
18	Finland	4.7	-1	-2.2%	17.3%	57	Bahrain	4.1	-2	1.0%	2.1%	96	El Salvador	3.3	2	1.7%	-16.1%
19	Hong Kong SAR	4.6	-1	-3.0%	16.3%	58	Colombia	4.0	4	2.3%	1.6%	97	Guatemala	3.3	-2	-0.6%	-16.1%
20	Sweden	4.6	1	-1.9%	16.0%	59	Argentina	4.0	-5	-1.2%	0.6%	98	Zambia	3.3	1	1.7%	-16.3%
21	Luxembourg	4.6	2	-0.5%	15.4%	60	Panama	4.0	-2	0.5%	0.3%	99	Paraguay	3.3	2	2.1%	-17.1%
22	Belgium	4.6	3	-0.6%	14.4%	61	Armenia	4.0	4	1.9%	-0.2%	100	Bangladesh	3.3	3	2.0%	-17.6%
23	Iceland	4.5	-1	-1.8%	14.2%	62	Mauritius	4.0	-6	-0.9%	-0.5%	101	Ghana	3.3	-1	0.9%	-17.6%
24	Ireland	4.5	-4	-3.9%	13.9%	63	Azerbaijan	4.0	-4	-0.3%	-0.6%	102	Nepal	3.3	0	1.8%	-17.8%
25	United Arab Emirates	4.5	1	0.7%	13.9%	64	Jordan	3.9	-1	-0.6%	-1.8%	103	Benin	3.2	3	4.0%	-18.7%
26	Czech Republic	4.5	1	0.3%	13.3%	65	Peru	3.9	4	2.1%	-2.1%	104	Nicaragua	3.2	-7	-2.0%	-19.1%
27	New Zealand	4.5	-3	-2.5%	12.6%	66	Kazakhstan	3.9	0	0.3%	-2.3%	105	Senegal	3.2	0	0.4%	-20.2%
28	Greece	4.5	0	0.2%	12.1%	67	Montenegro	3.9	-3	-0.7%	-2.6%	106	Honduras	3.1	-2	-2.1%	-21.5%
29	Estonia	4.4	2	-0.6%	10.7%	68	South Africa	3.8	0	-0.3%	-3.8%	107	Côte d'Ivoire	3.1	3	2.6%	-22.6%
30	Poland	4.4	3	0.8%	10.6%	69	Dominican Republic	3.8	3	2.6%	-3.9%	108	Venezuela	3.1	-1	-0.5%	-23.1%
31	Cyprus	4.4	-1	-0.8%	10.5%	70	Serbia	3.8	0	1.3%	-3.9%	109	Malawi	3.0	-1	0.2%	-24.0%
32	Indonesia	4.4	12	3.4%	10.3%	71	Morocco	3.8	-4	-2.1%	-4.8%	110	Nigeria	3.0	1	0.6%	-24.1%
33	Saudi Arabia	4.3	10	2.3%	9.3%	72	Albania	3.8	-1	1.0%	-5.0%	111	Lesotho	3.0	-2	-1.5%	-25.6%
34	Chile	4.3	4	0.9%	9.1%	73	Ecuador	3.8	1	1.0%	-5.7%	112	Cameroon	2.9	0	1.6%	-26.2%
35	Malta	4.3	-3	-1.9%	9.0%	74	Sri Lanka	3.7	1	1.4%	-6.0%	113	Angola	2.9	0	2.8%	-26.5%
36	Thailand	4.3	-1	0.2%	8.8%	75	Philippines	3.7	-2	0.1%	-6.3%	114	Sierra Leone	2.8	1	1.5%	-30.6%
37	Hungary	4.3	0	0.3%	8.7%	76	Botswana	3.7	2	3.0%	-6.6%	115	Mali	2.7	-1	-0.5%	-31.0%
38	Malaysia	4.3	-9	-3.0%	8.4%	77	Moldova	3.6	4	1.2%	-8.6%	116	Yemen	2.6	0	2.7%	-34.2%
39	Slovenia	4.3	-3	-0.7%	7.8%	78	Kenya	3.6	2	0.5%	-9.1%	117	Chad	2.5	0	1.3%	-37.5%

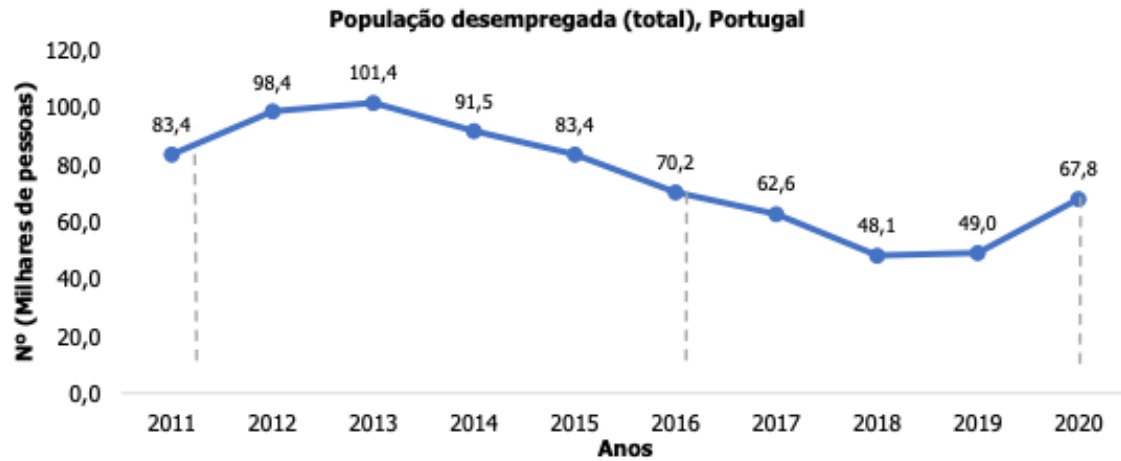
Source: World Economic Forum

Annex 5 - Unemployed population (by level of education) in the set of activities in the tourism sector in Portugal



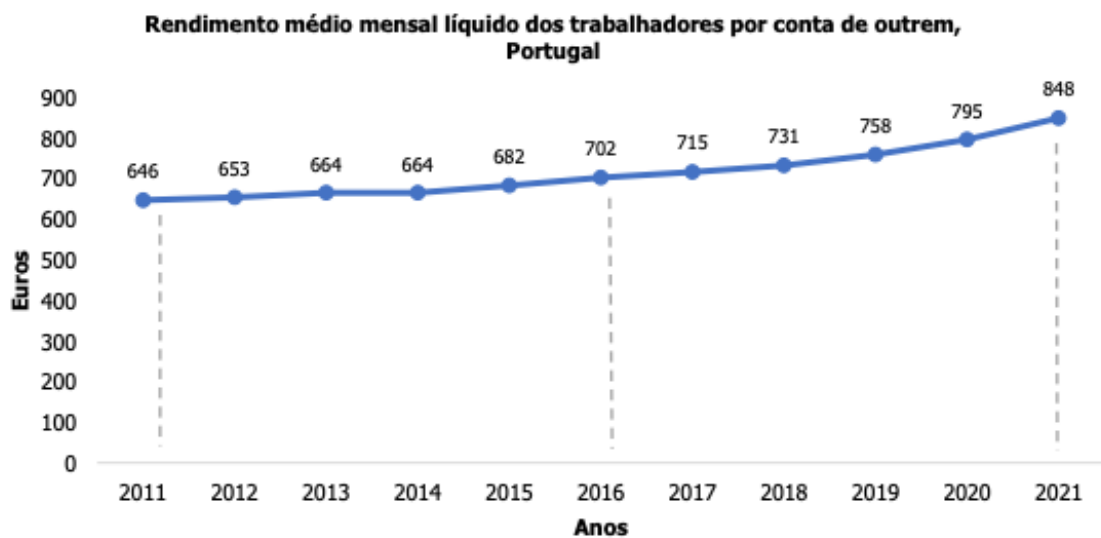
Source: Degeit

Annex 6 - Unemployed population (total) in the set of activities in the tourism sector in Portugal

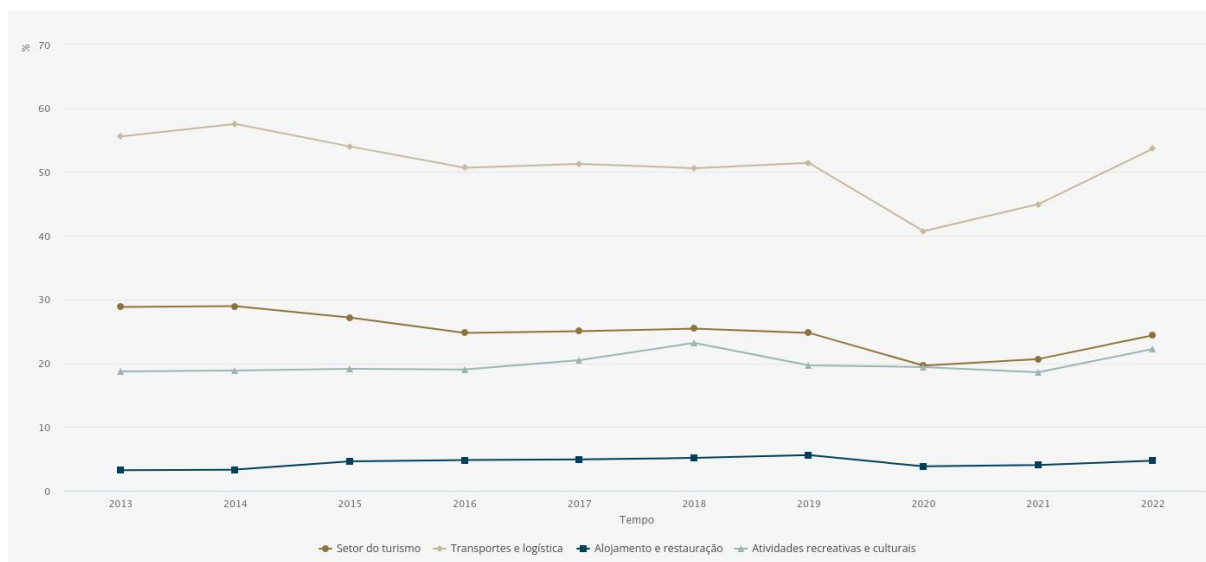


Source: Degeit

Annex 7 – Average net monthly income of employees in the tourism sector in Portugal



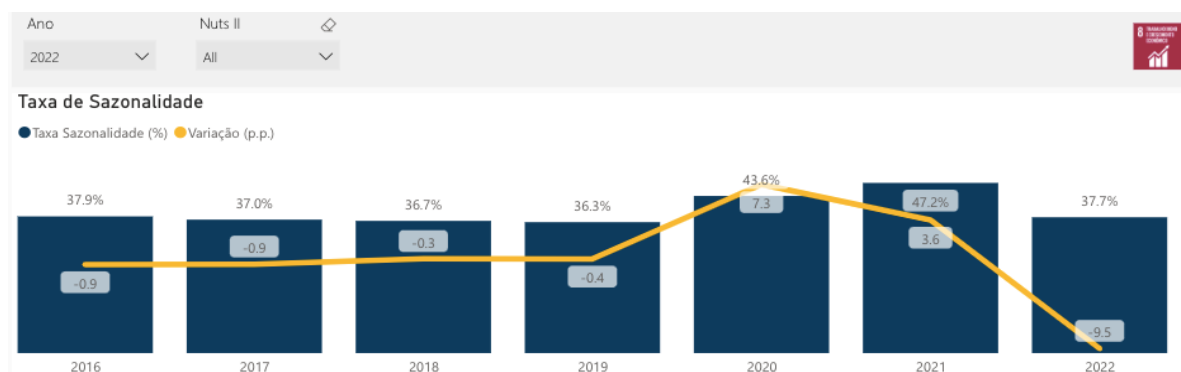
Source: Degeit



Annex 8 – Portugal's total service exports

Source: Bank of Portugal

Annex 9 – Seasonality Rate in Portugal 2022



Source: Turismo de Portugal

Annex 10 – Occupancy rates in the hotel industry (hotels, resorts, and tourist apartments) 2022

INDICADORES										
Portugal					A.M. Lisboa					
Valor	Var. 22/21	Quota	Var. 22/19		Valor	Var. 22/21	Quota	Var. 22/19		
2022	%	Abs.	2022	%	2022	%	Abs.	2022	%	
26.519,7	83,4%	12.057,7	100,0%	-2,3%	Hóspedes (milhares)	7.656,6	124,9%	4.251,6	100,0%	-6,8%
11.196,8	31,0%	2.652,7	42,2%	4,3%	Hóspedes de Portugal	2.213,0	51,2%	749,1	28,9%	-0,8%
15.322,9	158,9%	9.405,0	57,8%	-6,6%	Hóspedes do Estrangeiro	5.443,6	180,4%	3.502,5	71,1%	-9,1%
21.195,6	85,5%	9.772,3	79,9%	-1,8%	Hotelaria	6.172,2	125,6%	3.436,8	80,6%	-4,5%
4.133,1	88,5%	1.940,5	15,6%	-10,1%	Alojamento Local	1.456,8	122,9%	803,4	19,0%	-16,3%
1.191,0	40,8%	344,9	4,5%	25,6%	TER e TH	27,6	70,9%	11,5	0,4%	73,6%
69.694,8	86,7%	32.362,4	100,0%	-0,7%	Dormidas (milhares)	17.983,7	132,6%	10.252,2	100,0%	-3,5%
22.888,9	22,6%	4.217,1	32,8%	8,4%	Dormidas de Portugal	4.034,5	51,0%	1.362,0	22,4%	3,1%
46.805,9	150,8%	28.145,2	67,2%	-4,6%	Dormidas do Estrangeiro	13.949,2	175,7%	8.890,2	77,6%	-5,3%
57.238,4	89,6%	27.051,3	82,1%	-1,3%	Hotelaria	14.373,1	139,2%	8.365,5	79,9%	-1,7%
9.854,7	85,7%	4.548,1	14,1%	-3,4%	Alojamento Local	3.554,1	110,3%	1.864,1	19,8%	-10,9%
2.601,7	41,5%	762,9	3,7%	32,4%	TER e TH	56,5	66,3%	22,5	0,3%	63,4%
5.014,1	115,2%	2.683,8	100,0%	16,7%	Proveitos Globais (milhões €)	1.533,7	204,1%	1.029,3	100,0%	11,8%
3.808,3	117,3%	2.056,1	76,0%	17,9%	Aposento	1.226,2	214,1%	835,8	79,9%	13,1%
1.205,8	108,6%	627,8	24,0%	13,1%	Outros	307,6	169,8%	193,6	20,1%	6,6%
4.380,6	118,7%	2.377,7	87,4%	15,4%	Hotelaria Globais	1.362,0	207,1%	918,4	88,8%	11,9%
439,5	120,0%	239,7	8,8%	15,2%	Alojamento Local Globais	167,1	184,4%	108,4	10,9%	9,0%
194,0	52,0%	66,4	3,9%	63,4%	TER e TH Globais	4,7	119,5%	2,5	0,3%	128,6%
3.258,7	121,2%	1.785,3	85,6%	16,6%	Hotelaria Aposento	1.063,0	219,7%	730,6	86,7%	13,6%
396,5	123,8%	219,3	10,4%	16,4%	Alojamento Local Aposento	159,0	183,5%	102,9	13,0%	9,2%
153,1	50,6%	51,5	4,0%	62,0%	TER e TH Aposento	4,1	119,0%	2,3	0,3%	113,4%
					Taxas de Ocupação (%)					
49,9%		21,3%		-2,3%	Cama	53,5%		29,6%		-6,9%
60,9%		25,8%		-4,1%	Quarto	66,3%		35,5%		-9,5%
56,2	72,6%	23,6		13,8%	RevPar (€)	80,3	141,1%	47,0		9,0%
61,8	74,9%	26,5		11,5%	Hotelaria	85,2	142,0%	50,0		3,9%
36,6	81,4%	16,4		22,3%	Alojamento Local	58,8	132,1%	33,5		31,1%
35,8	19,3%	5,8		38,8%	TER e TH	52,9	66,4%	21,1		9,8%

Source: Turismo de Portugal

Annex 11 – Asleep and variation by NUTS III

Dormidas e variação por NUTS III

NUTSII	Valor	Variação %
Norte	11,556,645	88.2%
A. M. Porto	7,470,106	122.8%
Alto Minho	860,775	42.4%
Alto Tâmega	293,084	34.9%
Ave	584,132	57.1%
Cávado	1,058,649	48.4%
Douro	589,456	52.8%
Tâmega e Sousa	443,278	39.5%
Terras de Trás-os-Montes	257,165	43.2%
Centro	7,117,656	59.9%
Beira Baixa	206,003	34.8%
Beiras e Serra da Estrela	836,254	31.0%
Médio Tejo	1,194,908	94.0%
Oeste	1,414,061	64.4%
Região de Aveiro	881,319	61.5%
Região de Coimbra	1,482,057	57.9%
Região de Leiria	571,385	63.9%
Viseu Dão Lafões	531,669	50.8%
A.M. Lisboa	17,983,699	132.6%
A.M. Lisboa	17,983,699	132.6%
Alentejo	3,035,437	33.1%
Alentejo Central	918,909	49.3%
Alentejo Litoral	1,054,491	25.1%
Alto Alentejo	450,121	28.3%
Baixo Alentejo	382,175	17.1%
Lezíria do Tejo	229,741	59.3%
Algarve	19,252,632	77.1%
Algarve	19,252,632	77.1%
Açores	2,362,889	62.2%
Açores	2,362,889	62.2%
Madeira	8,013,169	82.3%
Madeira	8,013,169	82.3%
Total	69,322,127	85.7%

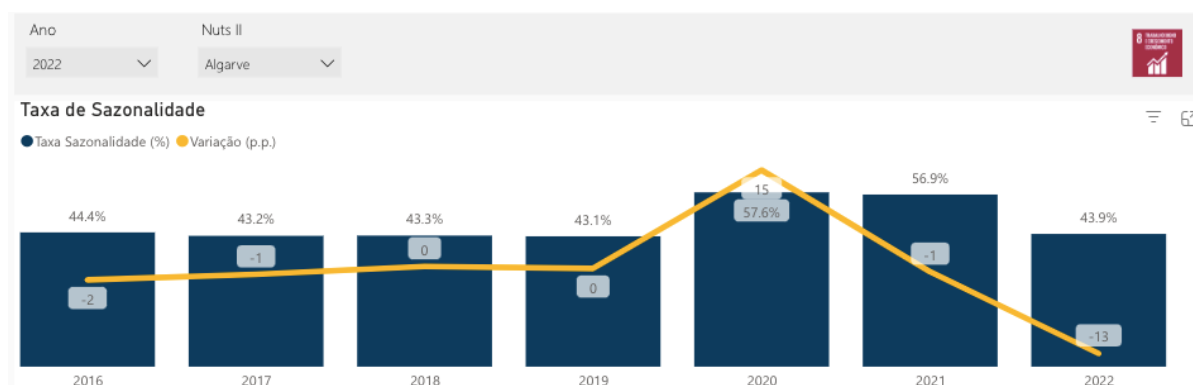
Source: Turismo de Portugal

Annex 12 – Movements at airports (18/07/2023)

Portugal					INDICADORES	
Valor 2022	Var. 22/21 %	Abs.	Quota 2022	Var. 22/19 %		
15.322,9	158,9%	9.405,0	57,8%	-6,6%	Hóspedes do Estrangeiro (milhares)	
2.114,4	205,0%	1.421,1	13,8%	-1,5%	Reino Unido	
1.430,1	151,1%	860,6	9,3%	-7,2%	Alemanha	
2.174,4	88,8%	1.022,8	14,2%	-4,9%	Espanha	
1.573,3	103,5%	800,0	10,3%	-3,1%	França	
925,7	293,4%	690,4	6,0%	-27,8%	Brasil	
1.510,4	337,1%	1.164,8	9,9%	25,6%	E.U.A.	
642,1	106,3%	330,8	4,2%	7,3%	Países Baixos	
457,5	238,7%	322,4	3,0%	10,6%	Irlanda	
672,7	161,7%	415,7	4,4%	-6,8%	Itália	
333,0	77,4%	145,3	2,2%	2,2%	Bélgica	
3.489,4	177,3%	2.231,1	22,8%	-18,3%	Outros	
46.805,9	150,8%	28.145,2	67,2%	-4,6%	Dormidas do Estrangeiro (milhares)	
9.047,8	193,8%	5.968,4	19,3%	-3,4%	Reino Unido	
5.377,4	142,6%	3.161,1	11,5%	-9,2%	Alemanha	
5.069,3	90,4%	2.406,7	10,8%	-3,4%	Espanha	
4.373,1	97,8%	2.162,2	9,3%	-4,8%	França	
2.272,6	265,1%	1.650,2	4,9%	-23,2%	Brasil	
3.463,9	330,0%	2.658,4	7,4%	27,7%	E.U.A.	
2.352,0	106,4%	1.212,2	5,0%	-0,7%	Países Baixos	
1.947,2	247,2%	1.386,4	4,2%	8,3%	Irlanda	
1.614,7	140,5%	943,4	3,4%	-5,3%	Itália	
1.051,8	75,6%	452,7	2,2%	1,3%	Bélgica	
10.236,1	150,1%	6.143,7	21,9%	-9,7%	Outros	

Source: ANA – Aeroportos de Portugal

Annex 13 – Seasonality in Algarve 2022



Source: Turismo de Portugal

Annex 14 – S.W.O.T – Intern Context

CONTEXTO INTERNO

POTENCIALIDADES	FRAGILIDADES
▪ Localização geoestratégica como <i>hub</i> internacional ▪ Clima ameno, luz, sol e mar ▪ Diversidade e elevado valor do Património histórico-cultural e natural ▪ Ecossistema empreendedor e criativo ligado ao Turismo ▪ <i>Upgrade</i> da oferta de alojamento & restauração ▪ Novas formas de alojamento, de qualidade reconhecida e que respondem à procura ▪ Hospitalidade ▪ Relação qualidade/preço ▪ Segurança ▪ Diversidade da oferta turística ▪ Autenticidade com inovação ▪ Gastronomia ▪ Facilidade de acesso e proximidade entre os vários destinos turísticos ▪ Número de falantes da língua portuguesa pelo mundo ▪ 60% da população portuguesa fala uma segunda língua	▪ Quadro económico-financeiro frágil e empresas pouco capitalizadas ▪ Existência de alguma desarticulação institucional e de coordenação entre agentes que operam no mercado turístico ▪ Défice de informação sobre a oferta ▪ Insuficiente presença das empresas do turismo no "mundo digital" ▪ Falta de conhecimento e de informação sobre a atividade turística ▪ Insuficiente presença de marcas/cadeias internacionais ▪ Falta de estruturação do produto ▪ Baixo nível de qualificações e de rendimentos dos profissionais de turismo ▪ Ausência ou deficiente sinalética turística ▪ Custos de contexto ▪ Assimetrias regionais ▪ Sazonalidade ▪ Défice de informação sobre o destino Portugal nos mercados externos ▪ Oferta turística pouco capacitada para diferentes mercados e segmentos

Source: ET27, Turismo Portugal

Annex 15 – S.W.O.T – Extern Environment

AMBIENTE EXTERNO

AMEAÇAS	OPORTUNIDADES
▪ Aumento da pressão sobre destinos e recursos ▪ Dificuldade de afirmação e desenvolvimento do destino Portugal enquanto mercado europeu perante o crescimento da procura por destinos fora da Europa e emergência de novos destinos ▪ Alterações climáticas ▪ Crescimento de fenómenos de insegurança ▪ Situação económico-financeira europeia e comprometimento no acesso a financiamentos ▪ Crescimento económico incerto em alguns dos países emissores ▪ Possibilidade de sobrecarga turística em determinados locais/destinos, podendo originar impactos negativos, destinos, designadamente de natureza ambiental e social ▪ Políticas protecionistas ▪ <i>Brexit</i> e respetivos impactos	▪ Previsões de crescimento para o turismo até 2030 ▪ Reconhecimento político e mobilização inter-institucional para o desenvolvimento turístico do país ▪ Alteração dos padrões de consumo e motivações, que privilegiam destinos que ofereçam experiências diversificadas, autênticas e qualidade ambiental ▪ Crescimento do turismo sénior e maior disponibilidade financeira para viajar em determinados segmentos, que possibilitam crescer em volume e em valor ▪ Procura crescente por hábitos saudáveis e produtos de saúde e bem-estar ▪ Crescimento da combinação férias/negócios ▪ Emergência de formas de financiamento alternativas (por exemplo, <i>crowdfunding</i>, instrumentos de empreendedorismo social) ▪ Captação de investimento internacional ▪ Abertura de ligações diretas a novos mercados (nomeadamente, China)

Source: ET 27, Turismo de Portugal

Annex 16- Interview Script - Caravanism as a Competitive Advantage in tourism in Portugal

Header (Context of the research)

This interview is a part of the study for a master's degree in management at ISCTE-IUL about the Competitive Advantage of Caravanism Tourism in Portugal through the VRIO Framework. The following interview, I seek to understand your insights on the strategic positioning of caravanism tourism within the Portugal tourism industry. Your responses are invaluable, as there are no right or wrong answers. Please answer all the questions sincerely to best reflect your expertise.

The interview will take approximately 20 minutes and will be recorded, following you to the Informed Consent Protocol.

Intro Questions

Question #1: Personal Information

- ☐ Full Name
- ☐ Age/Date of Birth
- ☐ Academic Background
- ☐ Professional Status

Questions #2: Travel Profile

- ☐ Tourist or Resident Status
- ☐ Type of Caravanning Vehicle Used (rented or owned)

Research Problem Declaration

Question #3: How can tourism sectors worldwide implement sustainable practices to balance economic growth with environmental and cultural preservation?

Question #4: What are the critical infrastructure developments needed in the tourism sector to ensure sustainable growth, and how can stakeholders address the current stagnation?

Question #5: In the wake of the pandemic, how have geopolitical factors influenced regional tourism recovery, and what measures can be taken to ensure a more equitable resurgence across different areas?

Question #6: Do you think caravanism offers a unique value proposition for tourists in Portugal? Yes/No and Why?

Question #7: Are there any unique resources or capabilities that caravanism offers that are not available to other forms of tourism?" Yes/No and Why?

Question #8: Is it easy for other companies or individuals to replicate the caravanism experience? Yes/No and Why?

Question #9: Does the caravanism industry in Portugal have the organizational structure and processes in place to support its continued growth? Yes/No and Why?

Question #10: What empirical evidence supports the notion that caravan parking in public spaces does not unfairly compete with traditional camping parks, and how can caravanism be integrated into urban planning?

Question #11: Would you say that caravanism has a competitive advantage for tourism in Portugal? Yes/No and Why?

Annex 17- Informed Consent Protocol

Interview - Caravanism as a Competitive Advantage in tourism in Portugal

I, _____ freely agree to participate in the study authored by Diogo Frade Cecílio (ISCTE Student, Instituto Universitario de Lisboa), supervised by Professor Doctor Rui Vinhas da Silva (Full Professor at ISCTE, Business School), within the scope of the Master's Dissertation in Management.

The main objectives of this study were explained to me, and I understand them, as set out in the informed consent protocol previously signed by me. I understand and agree to respond to an interview that explores questions about the “Caravanism as a Competitive Advantage in tourism in Portugal”.

I understand that my participation in this study is voluntary, and I can withdraw at any time, without this decision resulting in any harm to me. This interview will be recorded, and by participating in this work, I am contributing to the development of research in the tourism sector, however, no direct or indirect benefit is agreed upon for my collaboration.

I further understand that all information obtained in this study will be strictly confidential and that my identity will never be revealed in any report or publication, or to any person not directly related to this study, unless I authorize it in writing.

Name _____
Signature _____
Date ____/____/____

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