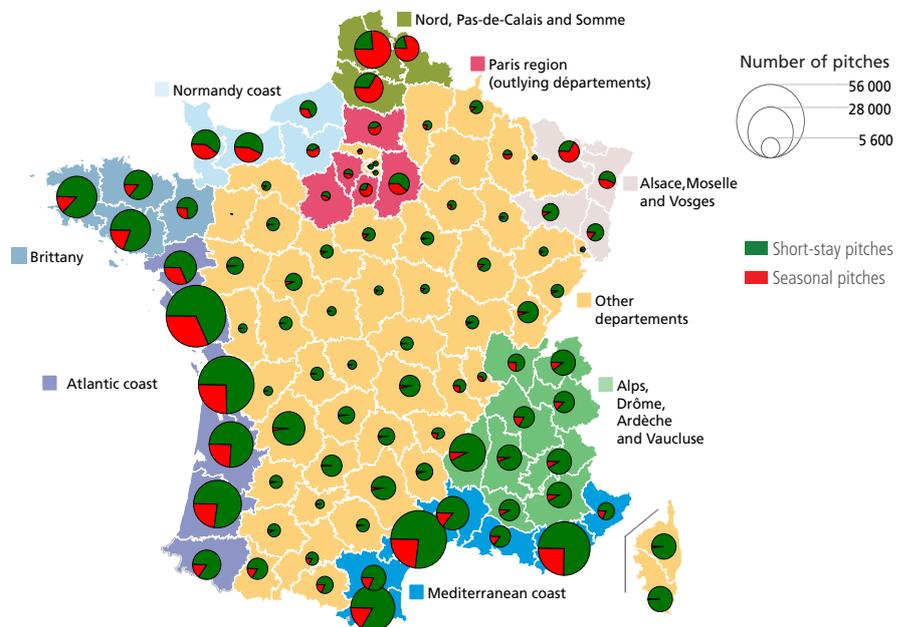


In 2016, people spent 39 million nights on seasonal pitches at campsites

There are approximately 216,500 seasonal pitches at campsites across mainland France. People tend to use them as second homes, with nine out of ten pitches housing a mobile home, chalet or caravan. Seasonal pitches are especially popular in northern France – outnumbering all other pitch types combined – and, to a lesser extent, along the Atlantic and Mediterranean coasts, where much of France’s open-air accommodation is situated. Seasonal pitches are more commonly found at smaller campsites – often unrated or with a 1- or 2-star rating – than at larger sites with higher-rated amenities. Some 45% of campsites with seasonal pitches rent them out to short-stay guests when their seasonal tenants are not using them. Discounting short-stay guests, people spent approximately 39 million nights at seasonal pitches in 2016. Each pitch, on average, is occupied by 2.6 people for 68 days each year. Average occupancy length is affected by campsite rating and tenant profile, with marked differences between retired and working users.

Map 1: Short-stay and seasonal pitches at French campsites



Key: the size of each circle is proportionate to the total number of pitches at campsites in each département. The red and green segments show the percentage of seasonal and short-stay pitches respectively. In the Pas-de-Calais département, for example, seasonal pitches make up three-quarters of all pitches. In the Charente-Maritime département, meanwhile, they account for one-quarter. Source: Insee, open-air accommodation provision at 1 January 2017.

There are approximately 925,500 pitches at campsites across mainland France in 2017. Around 709,000 pitches are intended for short-stay guests, while the remaining 216,500 are set aside for seasonal use (rented by the same tenant for an entire year). Research into the open-air accommodation sector tends to overlook seasonal pitches, focusing instead on short-stay guests. These pitches typically house a mobile home or caravan, which people use as second homes.

Seasonal pitches outnumber other pitch types in northern France

Seasonal pitches are not evenly distributed throughout mainland France¹. As expected, there are plenty of these

pitches along the Atlantic and Mediterranean coasts (71,000 and 34,000 respectively), where open-air accommodation is extremely popular (map 1 and table 1). One-quarter of all campsite pitches in the Charente-Maritime, Gironde, Landes, Hérault and Var départements are seasonal pitches – a proportion that is slightly higher in Vendée and Loire-Atlantique and substantially lower in Brittany. Seasonal pitches are also commonplace across northern France. With 41,100 such pitches – around three-quarters of all campsite pitches – in the Nord, Pas-de-Calais and Somme départements alone, they are very much part and parcel of the local

¹ For the purpose of this study, départements are grouped together by geography and number of seasonal pitches at campsites. Each grouping is marked by a distinct colour on maps 1 and 2.

identity. Seasonal pitches account for almost 40% of all pitches along the Normandy coast (15,900). They are also prominent, albeit in smaller numbers, in Alsace, Moselle, Vosges and the outlying départements in the Paris region. The Alpes-de-Haute-Provence, Hautes-Alpes, Drôme, Ardèche and Vaucluse départements have a lower proportion of seasonal pitches, and the numbers are even smaller elsewhere in mainland France.

Mobile homes occupy two-thirds of seasonal pitches

The overwhelming majority of seasonal pitches house some form of accommodation, with mobile homes (67.5%), caravans (16.3%) and chalets (6.6%) together occupying more than 90% of such pitches. The remaining pitches either house a bungalow tent or other unconventional accommodation type, or are left bare.

Accommodation types vary by region. Mobile homes are a popular choice for seasonal pitches in Brittany, along the Normandy coast and – to a lesser extent – on the Atlantic and Mediterranean coasts. The percentage of seasonal pitches with mobile homes is around the nationwide average in the Nord, Pas-de-Calais and Somme départements, and below-average elsewhere in France. Caravans account for 69% of seasonal pitches in Alsace, Moselle and Vosges, and are commonplace in the Alps, Drôme, Ardèche and Vaucluse (occupying 37.3% of pitches). In the outlying départements in the Paris region, meanwhile, caravans (32.1%) are tied for popularity with chalets (34.5%), which are also found in large numbers along the Atlantic coast.

Bigger campsites are more likely to have seasonal pitches

Seasonal pitches can be found at almost half (45%) of France's 8,300 campsites. Yet size (total number of pitches) is a clear indicator as to whether seasonal pitches are likely to be available (*figure 1a*) – campsites with fewer than 50 pitches account for 46% and 16% of all campsites with and without seasonal pitches, while the same figures stand at 6% and 20% for campsites with 200 or more pitches overall. In other words, the bigger the campsite, the more likely it is to have seasonal pitches available.

Seasonal pitches tend to be found at higher-rated campsites

Campsites with official star ratings are also more likely to offer seasonal pitches. The figures reveal that 4- or 5-star rated campsites make up 22% of campsites with such pitches, compared with just 9% of sites without (*figure 1b*). Conversely, there is a much lower likelihood of finding seasonal pitches at campsites in the "unrated, 1 or 2 stars" category, which accounts for 43% of sites with seasonal pitches and 66% of those without. Moreover, there is a clear correlation between these two

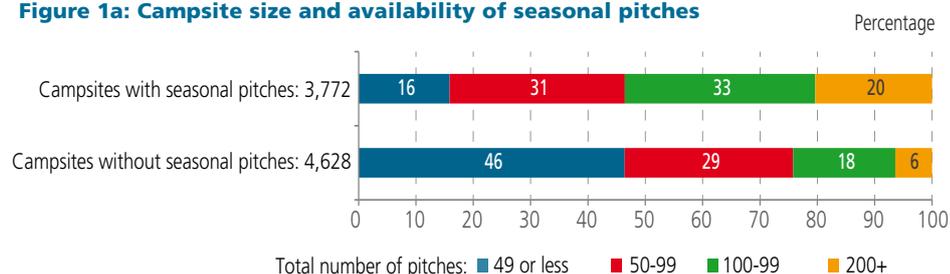
Table 1: Seasonal pitches - location and accommodation type

Location	Number of seasonal pitches	Accommodation:					
		Mobile home		Caravan		Chalet	
		No.	%	No.	%	No.	%
Atlantic coast	71,000	53,300	75.1	5,700	8.0	10,400	14.6
Nord, Pas-de-Calais and Somme	41,100	26,800	65.2	5,900	14.4	1,900	4.6
Mediterranean coast	34,000	24,900	73.2	6,300	18.5	200	0.6
Normandy coast	15,900	13,600	85.5	1,600	10.1	200	1.3
Brittany	11,400	10,400	91.2	500	4.4	100	0.9
Alps, Drôme, Ardèche and Vaucluse	11,000	5,000	45.5	4,100	37.3	200	1.8
Paris region (outlying départements)	8,400	2,300	27.4	2,700	32.1	300	3.6
Alsace, Moselle and Vosges	5,800	800	13.8	4,000	69.0	100	1.7
Other départements	18,000	9,000	50.0	4,600	25.6	900	5.0
Mainland France	216,500	146,100	67.5	35,400	16.3	14,300	6.6

Key: There are 41,100 seasonal pitches in the Nord, Pas-de-Calais and Somme départements, of which 26,800 (65.2%) house a mobile home, 5,900 (14.4%) house a caravan, and 1,900 (4.6%) house a chalet.

Source: DGE, survey on seasonal pitches at campsites, 2017.

Figure 1a: Campsite size and availability of seasonal pitches



Key: 16% of the 3,772 campsites with seasonal pitches have fewer than 50 pitches in total (seasonal and short-stay combined). Source: Insee, open-air accommodation provision at 1 January 2017.

Figure 1b: Campsite rating and availability of seasonal pitches



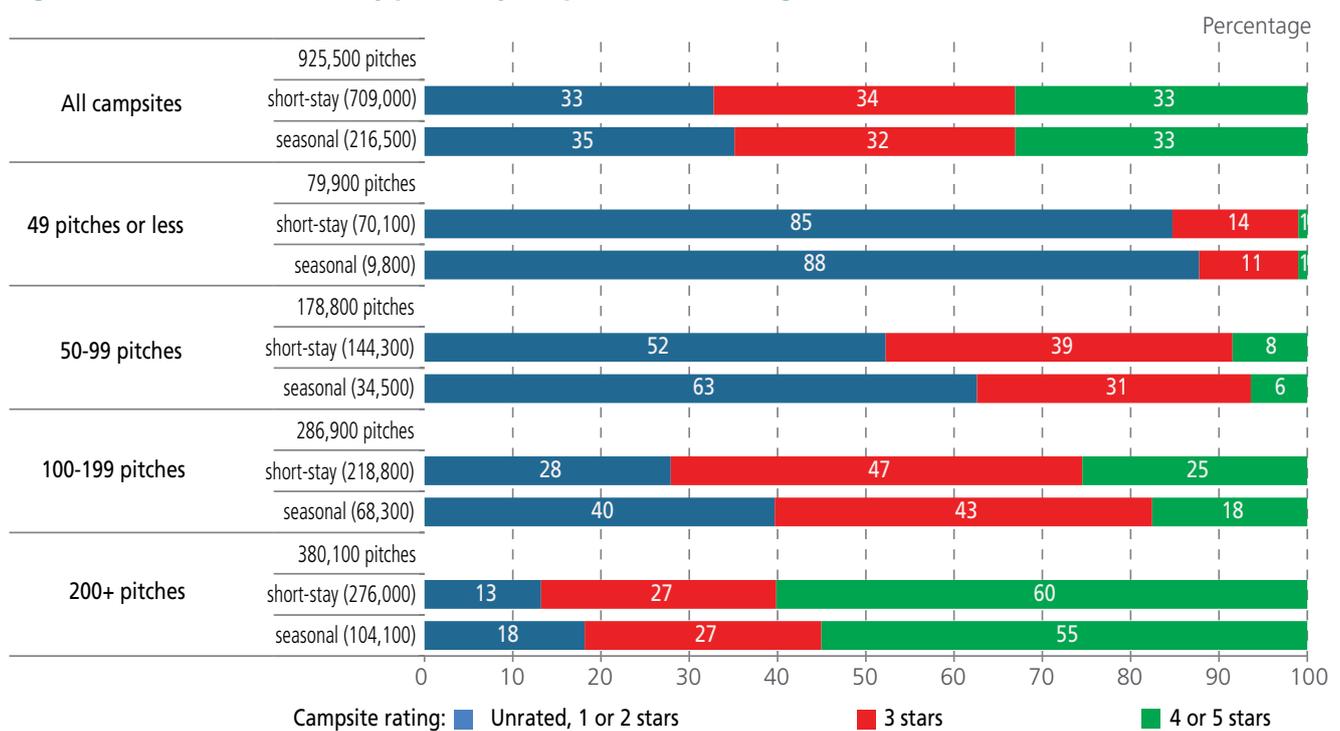
Key: 35% of the 3,772 campsites with seasonal pitches have a 3-star rating. Source: Insee, open-air accommodation provision at 1 January 2017.

determinants – campsite size and rating – and likelihood of providing seasonal pitches. Small campsites are less likely to be rated 3-star or above because, by virtue of their size, they cannot justify investing in the facilities they need to achieve higher star ratings (such as a swimming pool or child-care facilities). This observation is reflected in the statistics, which show that 600 of the 656 campsites with fewer than 20 pitches (90%) had a 2-star rating or lower.

Campsites rated 3 stars or above account for two-thirds of seasonal pitches

The total number of pitches (short-stay and seasonal combined) is evenly split three ways between three rating categories: "unrated, 1 or 2 stars", "3 stars" and "4 or 5 stars" (*figure 2*). When smaller campsites are discounted, the trend skews in favour of sites with higher star ratings. Yet there is an apparent link between campsite rating and percentage of both short-stay and seasonal pitches – a relationship that holds true across all size categories. Looking at campsites with 200 or more pitches, 4- and 5-star sites in this category account for 60% of short-stay pitches and 55% of seasonal pitches. In the 50-99 pitches bracket, meanwhile, both figures are below 10% (8% and 6% respectively).

Figure 2: Seasonal and short-stay pitches by campsite size and rating



Key: 32% of the 216,500 seasonal pitches in mainland France are located at 3-star campsites.

Sources: Insee, open-air accommodation provision at 1 January 2017; DGE, survey on seasonal pitches at campsites, 2017.

The data also show a correlation between a campsite's size and the percentage of seasonal pitches at the site. At campsites with less than 50 pitches in total, only 12% of available pitches are seasonal (9,800 out of 79,900). The proportion rises to 19% at campsites with 50-99 pitches, 24% in the 100-199 pitches bracket, and 27% at sites with 200 or more pitches – which, together, account for almost half of all seasonal pitches (104,000 out of 216,600).

Almost half of campsites with seasonal pitches rent them out to third parties

The distinction between seasonal and short-stay pitches is not as clear-cut as it may seem. Some campsites opt for a slightly different business model than conventional seasonal tenancy, instead offering to rent out seasonal pitches – typically with mobile homes or chalets – to third parties (short-stay guests) on behalf of their tenants. Under this model, the tenancy collects rent payments from short-stay guests and the campsite deducts its commission. The benefit of this arrangement is that it gives the campsite extra space to rent out to short-stay guests, especially in high season when short-stay pitches are fully booked. Some campsites even add a clause in the lease limiting the number of weeks the tenant can use the pitch in high season. Approximately 45% of campsites with seasonal pitches rent them out to short-stay guests in this way, and the model is marginally more commonplace along the Atlantic coast and in Brittany (50%). At campsites that do not offer this service, the seasonal pitch occupancy terms are set out in the site rules and regulations.

People spent 39 million nights at seasonal pitches in 2016

In 2016, people spend around 39 million nights at seasonal pitches² excluding rentals to short-stay guests by the campsite. In the same year, there were 112 million short-

² The survey (see insert) did not disaggregate pitch occupants by country of residence. In all likelihood, the vast majority of occupants were French residents. Some of the pitches in northern France were presumably rented by Belgian residents.

stay nights at campsites in France. The relative numbers of seasonal and short-stay nights differed markedly by location, however. There were 1.6 million short-stay nights (including seasonal pitches rented to third parties) at campsites in the Nord, Pas-de-Calais and Somme départements, compared with 7.3 million nights at seasonal pitches (map 2). The split was more even along the Normandy coast (2.9 million and 3.2 million nights respectively). And in other parts of France, the trend was reversed – 28.7 million versus 15.4 million on the Atlantic coast, and 29.2 million versus 6.6 million on the Mediterranean coast. Elsewhere, seasonal pitches accounted for only a tiny fraction of total nights – just as they make up only a small portion of total pitch availability.

Some people rent a seasonal pitch as their main residence, and cannot therefore be considered tourists. Because this is an unconventional practice, it is difficult to gauge the precise numbers involved. But a rough estimate – based on campsite opening dates – suggests that 1,500 to 3,000 seasonal pitches are used for this purpose, amounting to between 700,000 and 2 million nights each year. Nevertheless, the overwhelming majority of the 39 million nights spent at seasonal pitches in 2016 were indeed overnight tourist stays in the proper sense – with all that entails in terms of tourism consumption (food and drink, local shops and businesses, etc.).

Seasonal pitches are occupied for 68 days on average

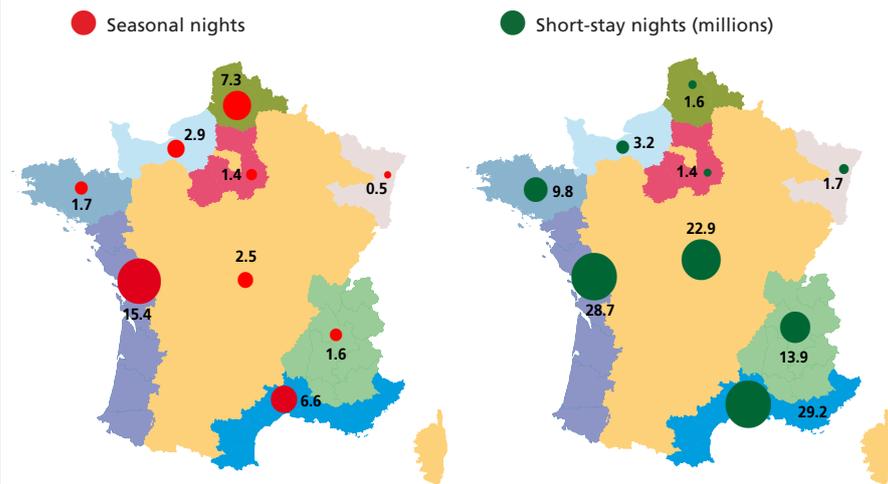
Seasonal pitches were occupied for an average of 68 days in 2016 (table 2). Average occupancy length is affected by tenant profile. Pensioners typically use their mobile home as a summer residence, spending the entire season on-site. Working tenants, meanwhile, tend only to use their seasonal pitch for a few weeks each year, in some cases allowing the campsite to rent out the pitch to other guests in their absence. Pitches are normally occupied for longer at higher-rated campsites – average occupancy length ranges from 62 days per year at unrated and 1- or 2-star campsites, to 68 days at 3-star sites, and 77 days at campsites with a 4- or 5-star rating. Some 10% of seasonal pitches are occupied for fewer than 30 days each year, 50% are occupied for between 40 and

88 days, and 10% are occupied for more than 120 days. The average number of occupants per day of occupancy is conditional on the type of campsite, whether or not it has family-friendly facilities, what dates the site is open, and other factors besides. In more than half of cases, pitches were occupied by two people. In 2016, the average seasonal pitch was occupied by 2.6 people per day of occupancy.

■ Insert: Survey on seasonal pitches at campsites

Insee's open-air accommodation occupancy statistics cover short-stay guests. Seasonal pitches are typically used as second homes, and this type of usage is separate from commercial collective accommodation (except where the campsite rents the pitches out to short-stay guests). In 2017, the Directorate General for Enterprise (DGE) surveyed campsites in mainland France, online and by post, to gauge the scale of this market segment. Campsites were asked how many seasonal pitches they had, how often they were occupied in 2016 (number of days of occupancy per year and average number of occupants per day of occupancy), and what accommodation they housed (mobile home, caravan, chalet, etc.). More than 1,000 campsites completed the survey. The findings presented here are based on 632 usable responses, once incomplete and inconsistent questionnaires were filtered out.

Map 2: Nights spent on seasonal and short-stay pitches by location



Key: In 2016, people spent 7.3 million nights on seasonal pitches and 1.6 million nights on short-stay pitches at campsites in the Nord, Pas-de-Calais and Somme départements. The red and green circles represent seasonal and short-stay pitches respectively. The size of each circle is proportionate to the number of pitches in that category. Sources: Insee, open-air accommodation occupancy survey, 2016; DGE, survey on seasonal pitches at campsites, 2017.

Table 2: Seasonal pitch occupancy length by campsite rating

Rating	Average occupancy (days)	Distribution (days)				
		First decile	First quartile	Median	Third quartile	Ninth decile
Unrated, 1 or 2 stars	62	27	35	52	70	100
3 stars	68	30	50	60	90	120
4 or 5 stars	77	30	50	75	90	150
Aggregate	68	30	40	60	88	120

Key: In 2016, people spent 7.3 million nights on seasonal pitches and 1.6 million nights on short-stay pitches at campsites in the Nord, Pas-de-Calais and Somme départements. The red and green circles represent seasonal and short-stay pitches respectively. The size of each circle is proportionate to the number of pitches in that category. Sources: Insee, open-air accommodation occupancy survey, 2016; DGE, survey on seasonal pitches at campsites, 2017.

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