



**APAT**

**Italian National Agency for the Protection of the Environment and for  
Technical Services**

# **CAMP SITE SERVICE EU ECO-LABEL AWARD SCHEME**



**EU Eco-Label**

## **1<sup>ST</sup> ACTIVITY REPORT**

**up to date 14<sup>th</sup> November 2003**

<b>INTRODUCTION</b>	<b>4</b>
<b>1 METHODOLOGY</b>	<b>5</b>
1.1 <b>Product group definition for camp sites</b>	<b>5</b>
1.1.1 Regulation 1980/2000 for the definition of product group	6
1.1.2 First step for definition of product group	6
1.2 <b>Environmental Impacts</b>	<b>7</b>
1.2.1 Environmental impacts of the camp site service	8
<b>2 ANALYSIS OF THE TOURIST OFFER AND MARKET</b>	<b>12</b>
2.1 <b>Camp site offer</b>	<b>13</b>
2.1.1 Tourist offer in Europe	13
2.1.2 Distribution of camp sites in European Countries	16
2.1.3 Trend of camp site structures in medium – long period	17
2.1.4 Trend comparison between camp sites and hotel	20
2.1.5 Distribution of bed places in European Countries	21
2.1.6 Trend of bed places in camp sites in medium – long period	22
2.1.7 Average dimension	24
2.1.8 Trend of average dimension in the medium-long period	25
2.2 <b>Camp site market</b>	<b>26</b>
2.2.1 Tourist market in Europe	26
2.2.2 Distribution of Tourist market in European countries	30
2.2.3 Trend of overnight stays in medium – long period	31
2.2.4 Comparison of trend between establishment and overnight stays	33
2.2.5 Average length of stay	34
2.2.6 Trend of average length of stay in the medium-long period	35
2.3 <b>Region distribution</b>	<b>35</b>
2.4 <b>The 10 new EU Countries</b>	<b>36</b>
2.4.1 Tourist offer	37
2.4.2 Average dimension	41
2.4.3 Camp site Market	42
2.4.4 Average length of stay	46
2.5 <b>Conclusion</b>	<b>48</b>
<b>3 PRODUCT GROUP DEFINITION FOR CAMP SITE SERVICE</b>	<b>49</b>
3.1 <b>Nomenclature and classification</b>	<b>49</b>
3.1.1 ISIC Rev 3.1 (Year of last revision: 2002)	49
3.1.2 Ver.1.1 (Year of last revision: 2002)	50
3.1.3 NACE REV.1	50
3.1.4 SICTA	51
3.1.5 TSP - Tourism-specific products	51
3.1.6 COMMISSION DECISION 9/12/98 on the procedures for implementing Council Directive 95/57/EC	52

<b>3.2</b>	<b>Analysis of Legislation for European Camp sites</b>	<b>55</b>
3.2.1	Nature of camp site regulation	55
3.2.2	Camp site definition	56
3.2.3	Camp site zoning	60
3.2.4	Other installation such as mobile homes and bungalows	60
3.2.5	Minimum mandatory requirements	60
3.2.6	Camping classification and relative competent body	63
3.2.7	Similarities and differences among national classification systems	64
3.2.8	Principal emphasis on the classification schemes	70
<b>3.3</b>	<b>Product group definition</b>	<b>71</b>
<b>4</b>	<b>PRELIMINARY APPROACH TO CRITERIA DEVELOPMENT</b>	<b>74</b>
<b>4.1</b>	<b>First results on impact areas</b>	<b>74</b>
<b>4.2</b>	<b>First proposal on criteria structure</b>	<b>77</b>
4.2.1	Working list towards criteria formulation	77
	<b>BIBLIOGRAPHY</b>	<b>79</b>
	Classification Normatives	79
	Official Camping Guides	79
	Nomenclature and classification	79

## Introduction

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This report discusses the results obtained during the first period of activity of the project entitled “Development of a draft Commission Decision establishing the ecological criteria for the award of the Community Eco-label for Camp Site service” commissioned by the European Commission to APAT (Italian National Agency for the Protection of the Environment and for Technical Services) in July 2003. The aim of this document is to describe the issues that will be presented and discussed during the AHWG in November 26 2003 in Rome.

The development of European Eco-label criteria for services started in July 2001 when the European Commission committed to ANPA (Italian Environment Protection Agency, now called APAT) the development of a draft criteria proposal Commission Decision establishing the ecological criteria for the award of the Community Eco-label to tourist accommodation in collaboration with the Greek Competent Body, ASAOS. The Criteria were adopted with Commission Decision of 14 April 2003 (2003/287/EC). On the basis of article 2 of Commission Decision of 14 April 2003 (2003/287/EC) group ‘tourist accommodation service’ shall comprise “the provision, against the payment of a fee, of sheltered overnight accommodation in appropriately equipped rooms, including at least a bed, offered as a main service to tourists, travellers and lodgers. The provision of overnight sheltered accommodation may include the provision of food services, fitness activities and/or green areas”. This definition excludes the possibility to award the European Eco-label to camp site which are offering a service which is not fitting the definition. The exclusion was due to the peculiarity of the service offered in open air with respect to the service offered by the overall tourist accommodations. Therefore the decision was to develop specific criteria for camp site on a second step. APAT will carry out the project with the technical support of ACTA (Association for Culture Tourism and the Environment).

The overall objective of this study is to elaborate a proposal of criteria fully compatible with the European Union Eco-label Award Scheme (European Regulation N. 1980/2000)<sup>1</sup>.

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<sup>1</sup> Revised scheme from the Council Regulation (EEC) N. 880/92.



# 1 Methodology

## 1.1 Product group definition for camp sites

The Commission Decision 2003/287/EC defines the product group “tourist accommodation service” as providing sheltered overnight accommodation in appropriately equipped rooms including at least a bed. This excludes the sector of accommodation offered by camp site where it does not consist in bungalows or other lodging structures for rent.

In order to establish the ecological criteria for the award of the “Community Eco-label for Camp Site Service”, a sub group as defined by article 2, comma 3 of the EC Regulation 1980/2000 on the eco-label award scheme has to be created, adapting the criteria of the existing tourist accommodation eco-label to the specific characteristics of **tourist accommodation** within camp sites, taking into account also the fact that a part of the camp sites may be identical to those already identified for the product group tourist accommodation, first eco-label developed for a service.

For this reason, the analysis shall refer to **camp site service**, or, otherwise said, **to tourist accommodation service within camp sites, and it shall be tackled as a subgroup of tourist accommodation.**

The sub-product camp site like the product group “tourist accommodation” is a true “product” as “any good or service” (art.1 of Reg. 1980/2000).

**The criteria for camp site services, as a sub-group according to art.2 comma 3 of the regulation, will now simply be an adaptation and eventual integration of the tourist accommodation criteria to the specific situation and service offer of camp sites.**

Camp sites who offer traditional camping service as well as additional lodging in bungalows or other stable structures will therefore not have to apply for two different labels, since the camp site eco-label will already contain the criteria relevant to the environmental impact of accommodation service, in a form which is applicable to both mobile and stable lodging and the connected service offer.

To define a product group which presents both goods and services is complex because usually the service cannot be separated from the good. However, it is true that services can be separated in *fields of activity*, just like accommodation structures are separated in different types of structures. In fact, the services are more homogeneous than structures with the changing of geographical and local conditions or with the changing of accommodation structure.

As a first step to proposing a sub-product group for camp site, it is important to consider the definition of *product group* stated by the Regulation 1980/2000 as well as other requirements.



### 1.1.1 Regulation 1980/2000 for the definition of product group

Regulation 1980/2000 in Article 1 states that the objective of the Community award is *to promote the products which have the potential to reduce negative environmental impacts as compared with the other products of the same product group.*

According to the Regulation, product group is “any GOOD or SERVICE which SERVE SIMILAR PURPOSES and ARE EQUIVALENT IN TERMS OF USE and CONSUMER PERCEPTION”

The extent of the two indicators (“good” and “service”) may vary greatly both among accommodation types (hotels and camp sites) and within the same type but different categories (one or five star hotels).

To serve a similar **purpose**, the camp site must include the provision of pitches for the stay of tourists and common service areas.

**The provision of pitches is the main element which distinguishes camp sites from other accommodation structures** (for details see chapter 3).

### 1.1.2 First step for definition of product group

The overall objective of this study is to elaborate a proposal of criteria fully compatible with the European Regulation 1980/2000. In order to achieve this result a product group “Camp Site Service” must be defined, which best fits the Regulation requirements and aims for a European Eco-label.

The proposal definition of the product group stems from an analysis of :

- the classification systems and nomenclature (chap. 3)
- overview of classifying systems that consider camp site service (chap. 3)
- update the picture of offer and demand of camp site services per country and region (chap. 2)
- analysis of the tourist market as it is distributed by type of accommodation, and specifically the camping sector (in progress)

## 1.2 Environmental Impacts

The Regulation states that the environmental impacts of the product group must be identified in order to develop criteria apt to reduce the negative ones.

It adds that “the environmental impacts shall be identified on the basis of examination of the interactions of products with the environment, including the use of energy and natural resources, during the life cycle of the product” (Art. 1.2.) These environmental aspects shall be identified in the light of the indicative assessment matrix I (of the Regulation) (see further)...” (Art. 3.1).

The life cycle assessment of a product (as defined by SETAC: Society of Environmental Toxicology and Chemistry) is the process by which it is possible to identify the environmental impacts relative to a product, a process or an activity, going from its pre-production, production, packaging, transportation and distribution, to its use, re-use, stocking, recycling and disposal. In other words, the impacts of the product are examined “from cradle to grave”.

Of a service the phases of the life cycle considered are different from that of a “good”: the pre-production, stocking and disposal have been omitted so that the cycle consists of the following three phases:

Purchase of the goods to supply the service, Supply of the service, Management of wastes.

Annex I of the Regulation is reported as Matrix 1.1. The columns report each phase of the life cycle of a good and a service. It can be noticed that the life cycle of the service is constituted only of three phases because not all processes typical of a good can be attributed to a service (for example pre-production, stocking, and packaging). “Disposal” becomes “managing of wastes”.

**Matrix 1.1 - Evaluation scheme. Life Cycle (Annex I of Regulation 1980/2000)**

Environmental aspects	Goods					Service		
	Pre-production /Raw Materials	Production	Distribution (included packaging)	Use	Re-use/ recycling/ disposal	Purchase of the goods to supply the service	Supply of the service	Management of waste
Quality of air								
Quality of water								
Soil protection								
Waste reduction								
Energy saving								
Natural resource management								
Global heating prevention								

Ozone layer								
Environmental safety								
Noise								
Bio-diversity								

In Matrix 1.1 the first column reports the environmental aspects on which the services act. The good and the service are on the right columns in their respective phases of the life cycle.

Filling Matrix 1.1 with data allows the assessment of the environmental impacts of each service in every phase of its life cycle . From the analysis of this split-up of environmental impacts the Regulation asks, according to technical possibilities, that :

1. in evaluating the comparative improvements, consideration should be given to the net environmental balance between the environmental benefits and burdens, including health and safety aspects, associated with the adaptations throughout the various life stages of the products being considered.
2. the key environmental aspects should be determined by identifying the categories of environmental impact where the product under examination provides the most significant contribution from a life cycle perspective, and among such aspects the ones for which a significant potential for improvement exists.

For this purpose it is necessary to precisely define the elements of the services which are involved in each of the three phases.

1.2.1 Environmental impacts of the camp site service

The Regulation states that the environmental impacts of any product group will be evaluated according to the life cycle of the product group on the following environmental aspects:

- Air
- Water
- Soil
- Waste
- Energy
- Natural resources
- Global heating
- Ozone layer
- Environmental safety
- Noise
- Biodiversity

Camp site service, like tourist accommodation service has impacts on all the environmental aspects.

The WATER use is mainly due to customer use of the sanitary facilities (washing basins, toilet and shower) and the filling of the mobile structures' own water tanks. Cleaning also implies water usage,( to clean the common services, sanitary facilities, leisure areas). A very common service in camp sites is the offer of swimming pools, which involves a considerable water consumption. The biggest impact is therefore generally that of the sanitary services, followed by wellness/leisure activities.

WASTE can be considered as one of the most important impacts deriving from camp site service, since there will be not only the waste resulting from the management and service offer of the site, but also that originating from the guests' own operation of their "mobile households" (principally cooking and cleaning/washing in tents, caravans and mobile homes) which is considerably superior to that resulting from the production of food and lodging service for the same number of guests by a single operator like a restaurant kitchen or a housekeeping department.

ENERGY is mainly used for heating and lighting of common areas and sanitary facilities and eventually of fixed structures for rent, if present.

The impacts on NATURAL RESOURCES come from the material used to build the structural elements of the camp site. This may be an important aspect where the site contains many buildings and facilities, which may have environmentally friendly furniture and interior decoration or not. In fact, decoration may play an important part if it chooses to use rare resources, thus affecting the BIODIVERSITY of the environment.

ENVIRONMENT SAFETY is influenced mainly by detergents which may pollute the environment (SOIL and WATER) if not managed correctly, through, for example, the choice of environmentally friendly detergents and through moderate use by both staff and guests in their own structures. On the second issue, however, the camp site management itself has only limited influence, for example through the offer of certain products opposed to others in the site's own shop (particularly important for the chemicals used for portable toilets).

Due to its frequency of use, the service area "sanitary/hygiene" is probably the one with the heaviest impact on the environment.

A hypothetical estimation of the environmental impact of this area, based on a first estimation of data originating among other sources also from several European environmental hallmarks is given in matrix 1.2.



Matrix 1.2

Environmental aspects	Sanitary/Hygiene				
	Purchase of the goods to supply the service	Supply of the service			Management of waste
		Cleaning the facilities	Supply of hot/cold water	Using of the facilities by the customer	
Quality of air	x	x		x	x
Quality of water	x	x	x	x	x
Soil protection					x
Waste reduction		x		x	x
Energy saving	x	x	x	x	x
Natural resource management	x	x	x	x	x
Global heating prevention	x				x
Ozone layer					x
Environmental safety	x	x	x	x	x
Noise				x	x
Bio-diversity					x

In order to be able to determine with scientific certainty which services of the product group “camp site” entail the heaviest environmental impact, and have therefore to be regulated by specific criteria, the approach will be based on the following elements:

- the existing criteria of the tourism accommodation service label
- the services and areas of service of camp sites, resulting from a preliminary screening of :
  - the service required by legislation and/or classification schemes of the different countries
  - the service offer as presented in catalogues and publications of the European camp site associations/organizations.

This list of services will then be crossed with the service areas represented in the criteria of the environmental hallmarks for camp sites in Europe, creating a supposed list of services with the most incisive impact on the environment.

It has to be stressed that the actual version of this matrix has not to be considered definitive yet, for the following reasons:

- the collection of data regarding legislation and classification for camp sites in general and criteria regarding the environmental management and/or classification of camp sites in particular has not yet been concluded
- in order to reach the most complete and comprehensive result possible, the list of service elements with potential impact on the environment should be revised and commented upon by the participants at the AHWG before moving on to its compilation.

Attachment 1 ([matrix\\_impact.xls](#)) shows the proposed research matrix for the determination of the environmental impact of camp site services.



## 2 Analysis of the tourist offer and market

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### Methodological aspects

The data analysed come from Eurostat data (Eurostat, “Tourism statistics - Yearbook”, 2002 edition) and some have been integrated from previous study on European Ecolabel for Tourist Accommodation.

The first step of the analysis examines the quantitative distribution on camp sites and the medium to long period trends in European countries and in new 10 countries which newly entered the European union. The analysis takes into consideration two different levels of geography: the entire European Union and the single nations. Analysing the same phenomenon on different levels allows to perceive differences and similarities of that phenomenon in its various manifestations and to identify homogeneous geographical areas according to boundaries which do not coincide with political borders.

In detail, the analysis is structured as follows:

### Analysis of the camp site offer

The analysis is therefore structured according to the following pattern:

- Analysis of distribution of camp sites
  - per number of establishments
  - per number of beds
- Analysis of medium and long term trend, taking into consideration the period 1990-2000.
- Geographical distribution of the tourist offer.
- Trend comparison between hotels and camp sites

### Analysis of the camp site demand

The analysis is therefore structured according to the following pattern:

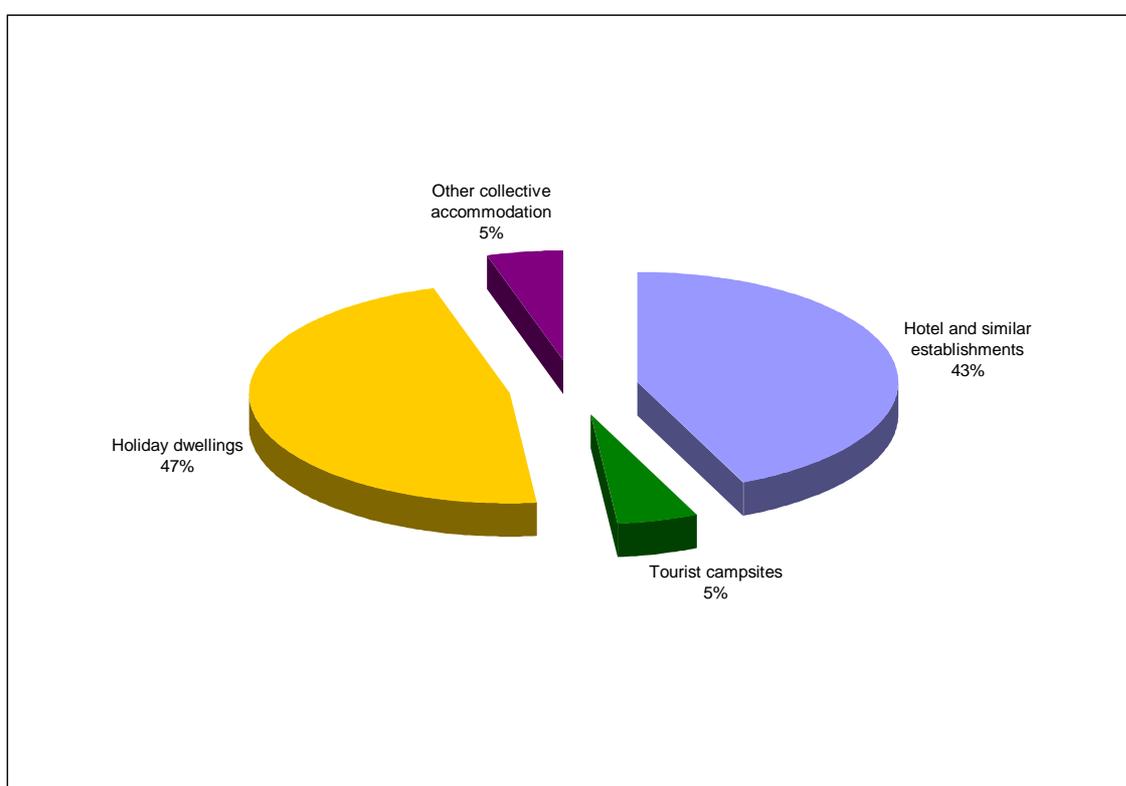
- Analysis of the distribution of the demand in the European Union as a whole
  - Per arrivals
  - Per overnight stays
- Analysis of medium and long term trend, taking into consideration the period 1990-2000.
- Geographical distribution of the demand
- Analysis of medium and long term trend, taking into consideration the period 1990-2000 of the overnight stays
- Average length of stay

## 2.1 Camp site offer

### 2.1.1 Tourist offer in Europe<sup>2</sup>

In Europe the number of accommodation establishments is 474.059 of which 90% is distributed quite homogeneously between Hotels and similar establishments and Holiday Dwelling. These two accommodation types hold 43% and 47% of the tourist establishments, respectively. The remaining 10% is equally distributed between camp sites and other collective accommodations (Graph 2.1).

**Graph 2.1 - Tourist accommodation establishments**



Source: Elaboration ACTA on Eurostat data 2002

In the year 2000 the number of European camp sites was 24.052.

In the latest 10 years (1990-2000) the number of camp sites has increased of 4,60%; in 2000 the number of camp sites increase was of 1053 structures compared to ten years before.

Notwithstanding the trend was not uniform at all. As shown in the graph 2.2 there are four different moments:

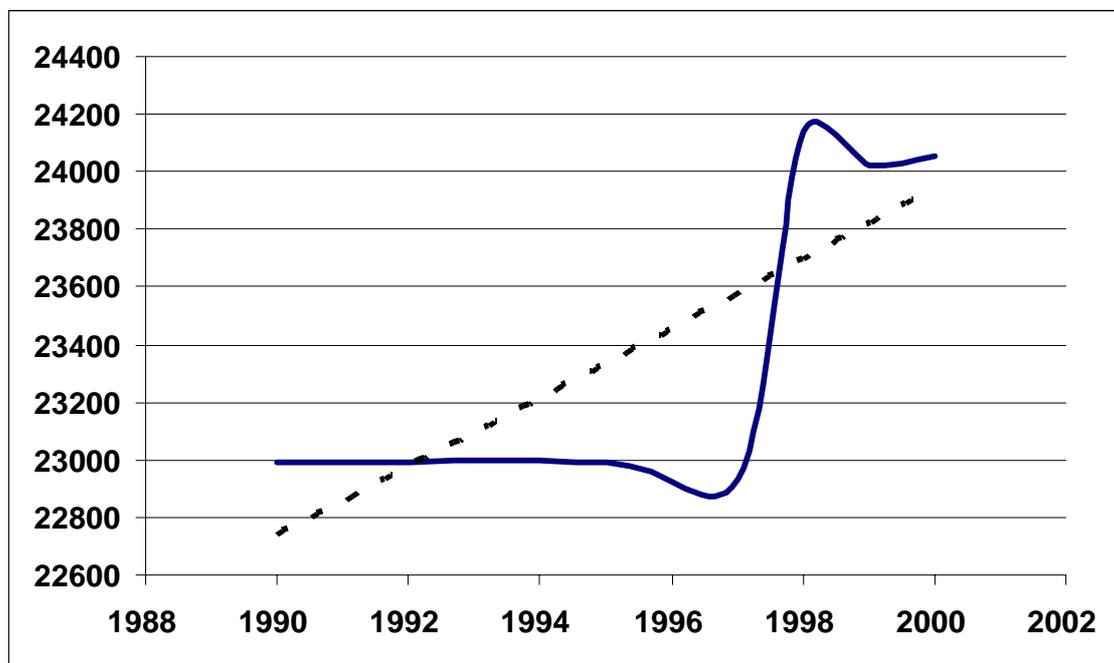
- 1990-1997 characterised by a decreasing trend, touching its minimum value in 1997
- 1997-1998 with an increase reaching its peak in 1998 (+5,26% vs. previous year);

<sup>2</sup> The data of the following countries refer to the latest useful year: U.K. (1999); Liechtenstein (1998); Greece (1999); Switzerland (1999).



- 1998-1999, featuring a new decrease (-0,50% in 1999 vs. previous year);
- 1999-2000, when the trend changes again (+0,14% in 2000 vs. previous year).

**Graph 2.2 – Trend of camp site number (1990-2000)**



Source: Elaboration ACTA on Eurostat data 2002

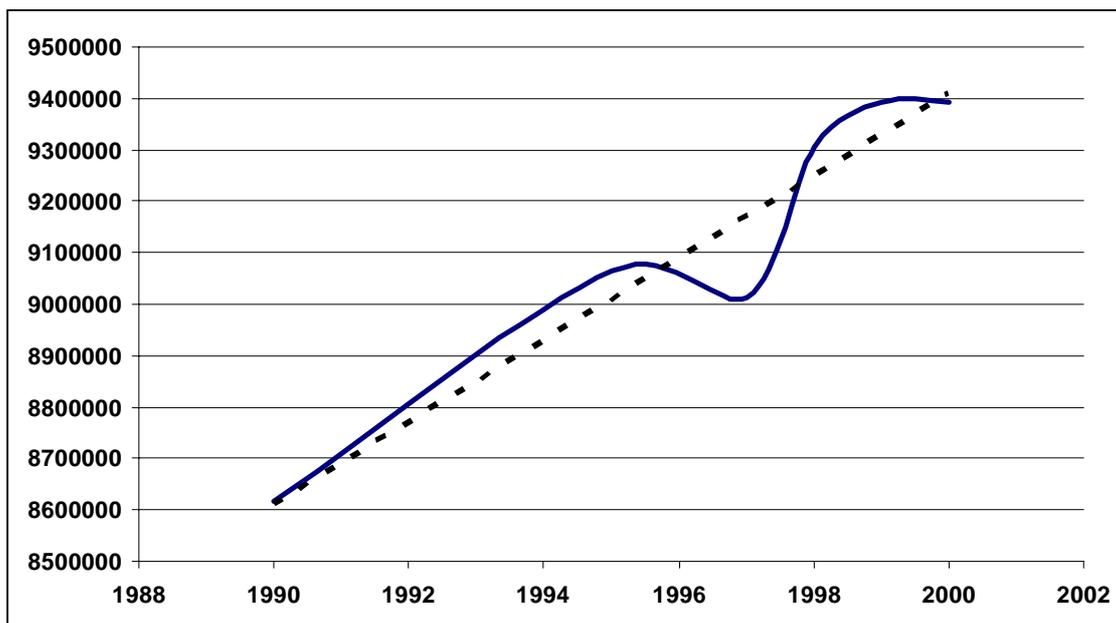
The number of bed places with reference to the same time span increased more than proportionally to the number of camp sites. The increase of bed places from 1990 to 2000 was 9,03%. In 2000 bed places were 9.393.397, i.e. 778.228 bed places more than 1990.

The following graph shows that starting 1990 the trend was increasing although in the latest years the increase was slower.

For the bed places number three moments can be identified as well:

- 1990-1995, with a remarkable increase (+5,2% in 1995 vs. 1990);
- 1995-1997, with a slightly negative trend (-0,55% in 1997 vs. 1995);
- 1998-2000, showing a new increase, intense in 1998 (+3,23%), constant in the latest years (+ 0,01% in 2000).

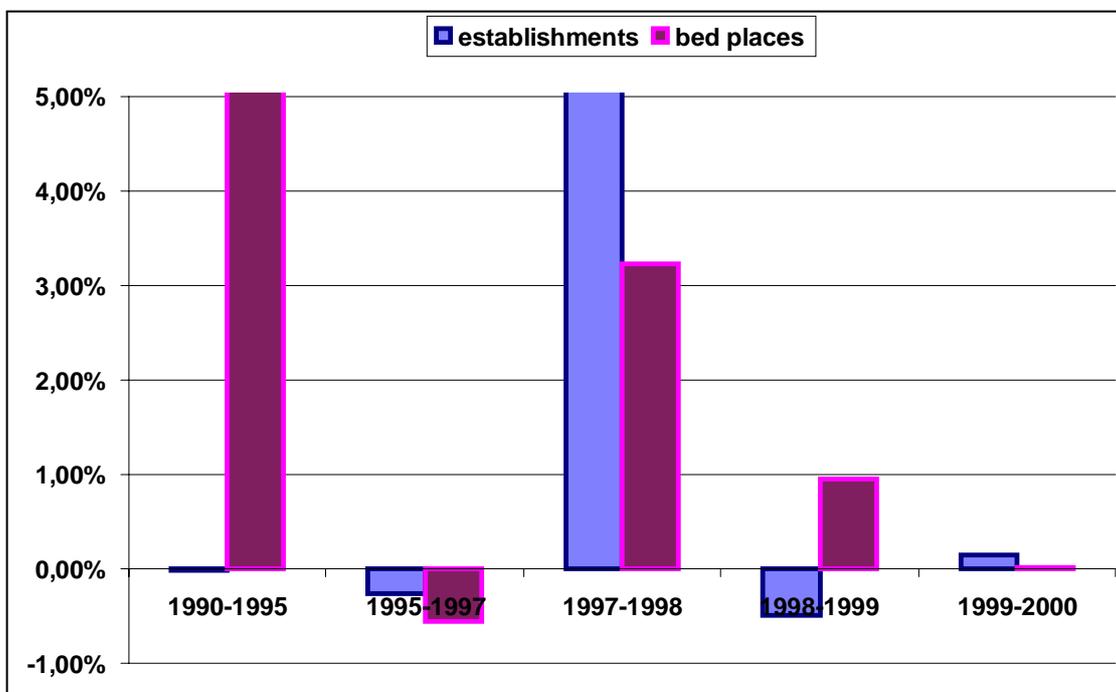
**Graph 2.3 - Trend of bed place number (1990-2000)**



Source: Elaboration ACTA on Eurostat data 2002

One can therefore maintain that accommodation offer in camp sites from 1990 to 2000 increased both as regards structures and bed places. The larger increase rate vs. bed places stresses an increase in the average dimension of camp sites (Graph 2.4).

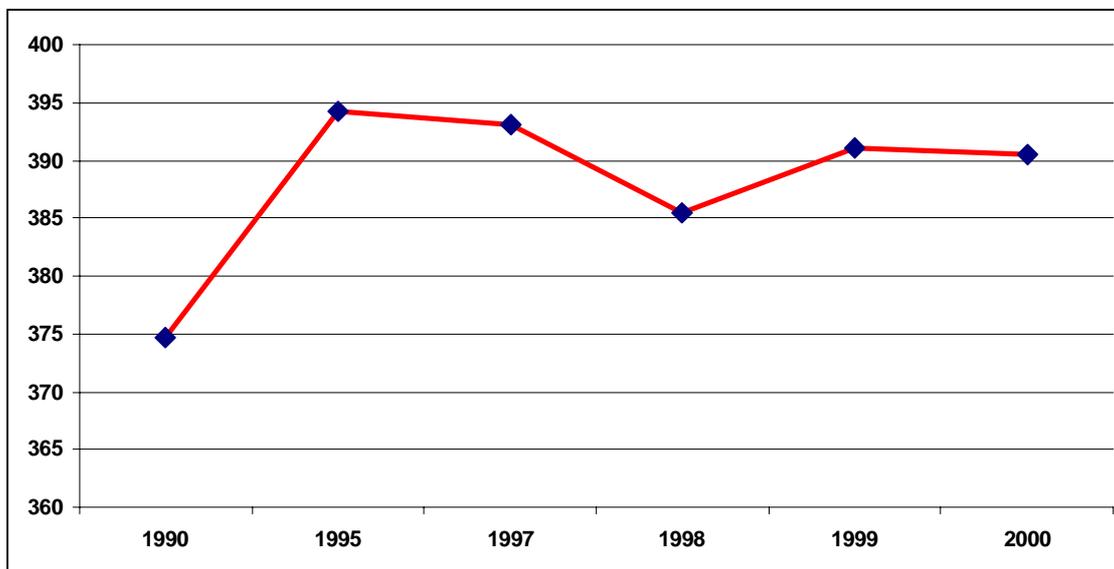
**Graph 2.4 - Percent variation of the number of bed places / structures**



Source: Elaboration ACTA on Eurostat data 2002

As shown in the following graph (Graph 2.5), from 374 bed places per camp site (in 1990) the average dimension increases to 390,56 (in 2000). The largest increase happens in the period 1990-1995, when, as shown before, to a slight decrease of camp sites corresponds a strong increase of bed places.

**Graph 2.5 - Trend of the average dimension of camp sites (1990-200)**



Source: Elaboration ACTA on Eurostat data 2002

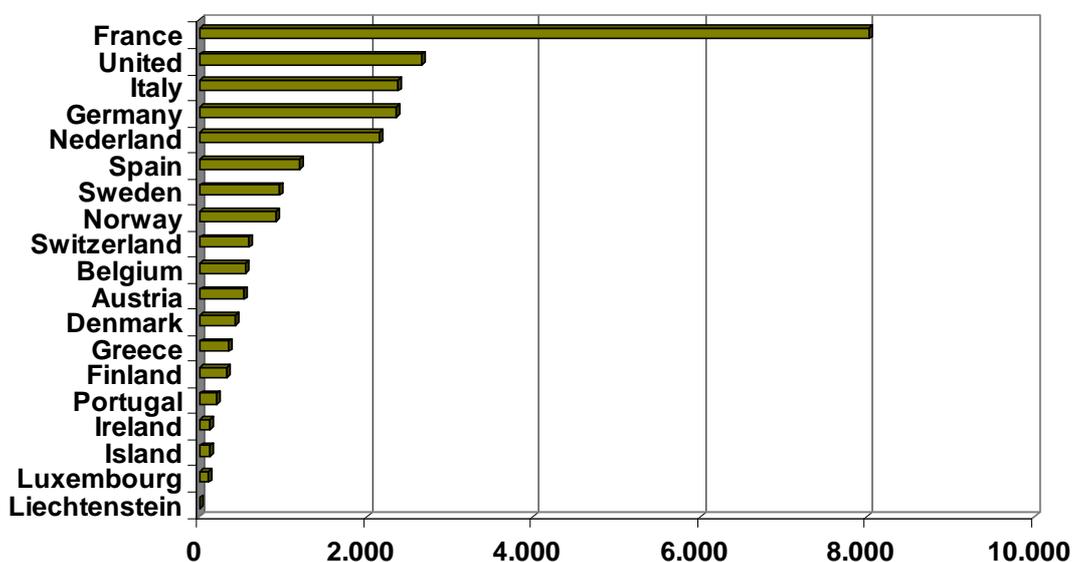
### 2.1.2 Distribution of camp sites in European Countries

The number of camp sites in Europe in the year 2000 was 24.052, of which more than 80% distributed in France, U.K, Italy, Germany, Holland, Spain and Sweden.

The distribution of camp site structures among the European countries presents a high heterogeneity. The country with the highest number of structures is France with altogether 8.021 structures, representing 33,35% of the establishments in Europe. Behind UK (11,08%), Italy (9,88 %), Germany (9,84%), Holland (8,97%), Spain (4,98%) and Sweden (4,02%). Seven countries above represent 82% approx. of the camping establishments in Europe.

The country with the least number of accommodation structures is Liechtenstein, Luxembourg, Island and Ireland.

Graph 2.6 - Distribution of camp sites in Europe (2000)



Source: Elaboration ACTA on Eurostat data 2002

### 2.1.3 Trend of camp site structures in medium – long period

For the medium-long period trend, the last 10 years were examined, from 1990 to 2000; exceptions are notified with notes.

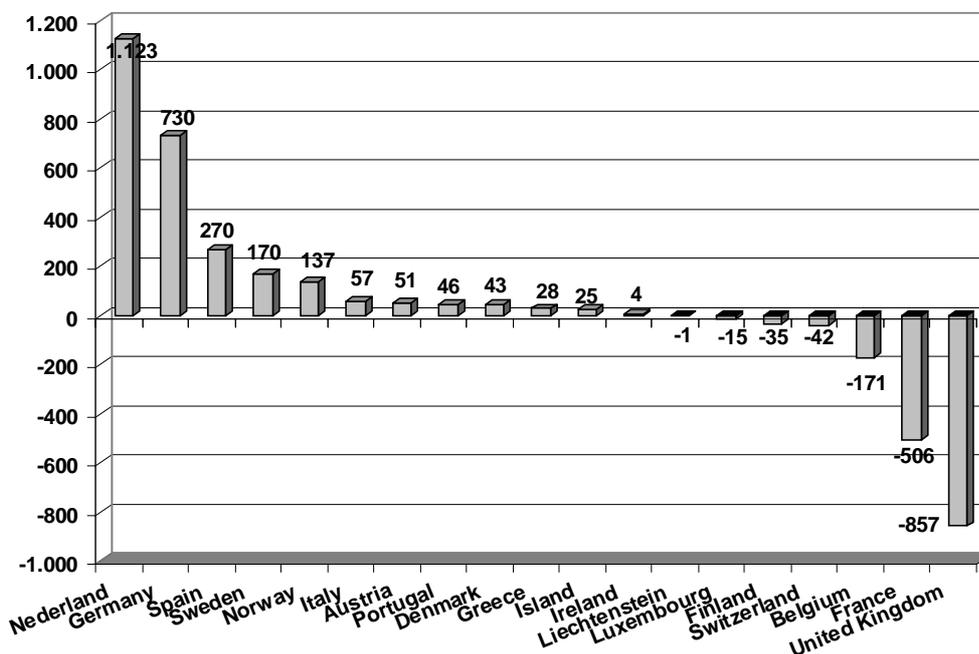
Due to the lack of homogeneity of the sources, the analysis of the general European trend was considered methodologically incorrect, but the different countries were analysed separately.

The following graphs and tables report the trend and the variation index in the years 1990-2000.

From the analysis it can be seen that:

- the trend in camp sites has been inhomogeneous in the different countries: twelve have undergone a positive trend, seven a negative one. In general there has been a positive trend;
- Both France and United Kingdom show a negative trend;
- United Kingdom registers the maximum negative trend (-24%), followed by Liechtenstein (-25%), Luxembourg (-12%). France register a negative trend equal to -6%;
- The analysis shows an interesting result: the highest positive trend were scored by Nordic countries, such as Holland with the highest trend in absolute (109%), Germany (45%), Island (23%), Sweden (22%) and Norway (17%);
- Italy and Austria have a constant trend

Graph 2.7 - Variation in the number of camp sites from 1990 to 2000<sup>3</sup>



Source: Elaboration ACTA on Eurostat data 2002

Table 2.1 - Distribution in time of camp sites

	1990	1995	1997	1998	1999	2000
Belgium	725	602	591	579	574	554
Denmark	392	437	449	442	437	435
Germany	1.636	2.218	2.243	2.270	2.359	2.366
Greece	316	296	335	340	344	:
Spain	928	1.130	1.084	1.142	1.170	1.198
France	8.527	8.195	8.141	8.059	8.027	8.021
Ireland	:	131	132	136	134	135
Italy	2.319	2.346	2.379	2.375	2.378	2.376
Luxembourg	127	123	117	118	115	112
Holland	1.035	967	1.033	2.035	2.106	2.158
Austria	489	523	521	549	538	540
Portugal	157	c	177	185	196	203
Finland	363	348	341	338	336	328
Sweden	797	965	972	971	969	967
United Kingdom	3.523	3.013	2.926	2.910	2.666	:
Island	108	141	146	143	:	133
Liechtenstein	:	4	3	3	:	:
Norway	783	760	748	953	931	920
Switzerland	635	:	594	590	593	:

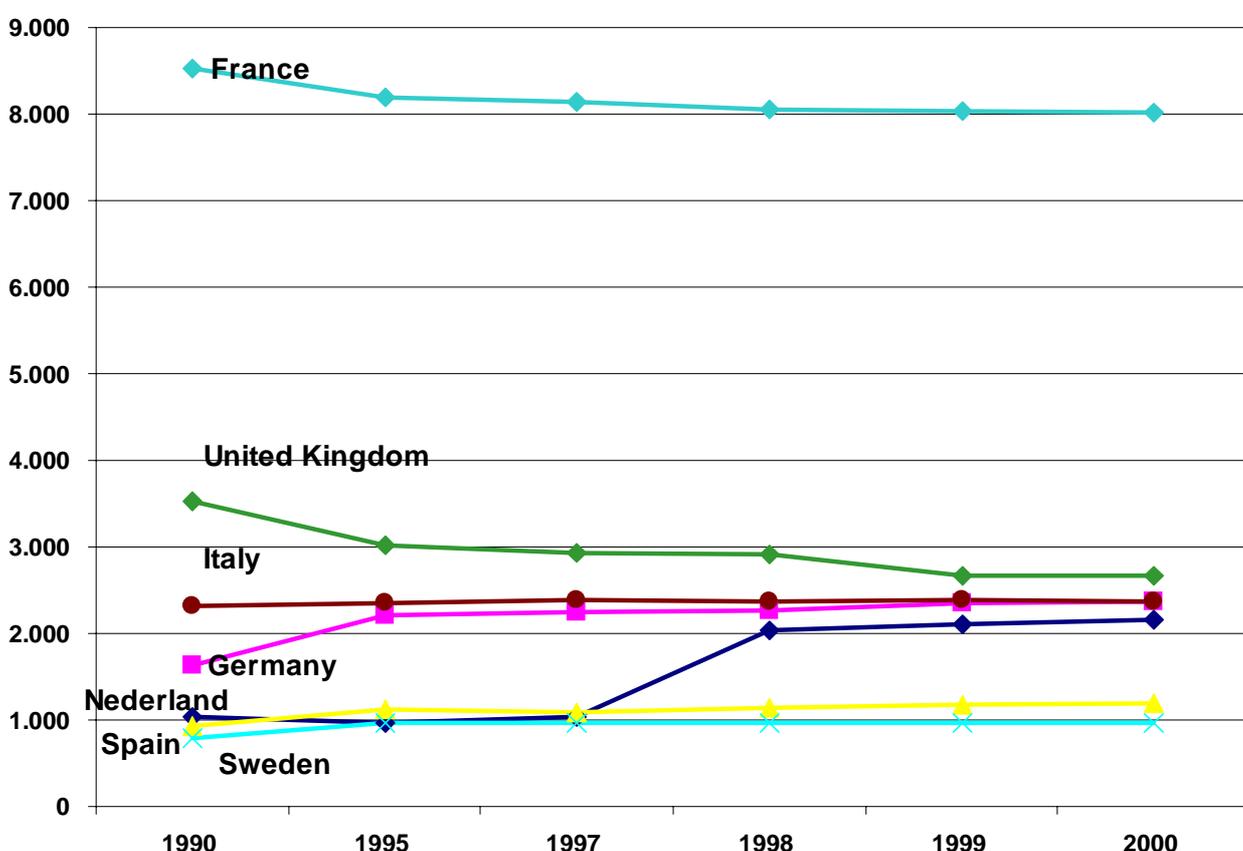
Source: Elaboration ACTA on Eurostat data 2002

<sup>3</sup> The variations registered in the number of hotels refer to the years 1990 -2000 with the exception of :UK 1990 -2000, Sweden (1990-199); Ireland (1995-2000); Liechtenstein (1995-1998).

If the analysis of the variation of the accommodation structures is focused only on the 6 nations where most of it takes place it shows that from 1990 to 2000:

- The negative trend only appears in the two nations with the largest accommodation offer, France and UK. Therefore the trend is rather relevant for UK equal to 857 structures less (-24%); in France the structures that closed down were 506 (-6%);
- in Italy the trend is almost constant: new structures are 57 (+2%);
- Holland, Germany, Spain, and Sweden, show a relevant increase of new structures, amounting respectively to 109%, 45%, 29%, 22%;
- With the exception of France, all countries under scrutiny seem to settle around an average figure of 2.000 / 2.200 structures.

**Graph 2.8 - Trend of camp site structures in seven European countries**

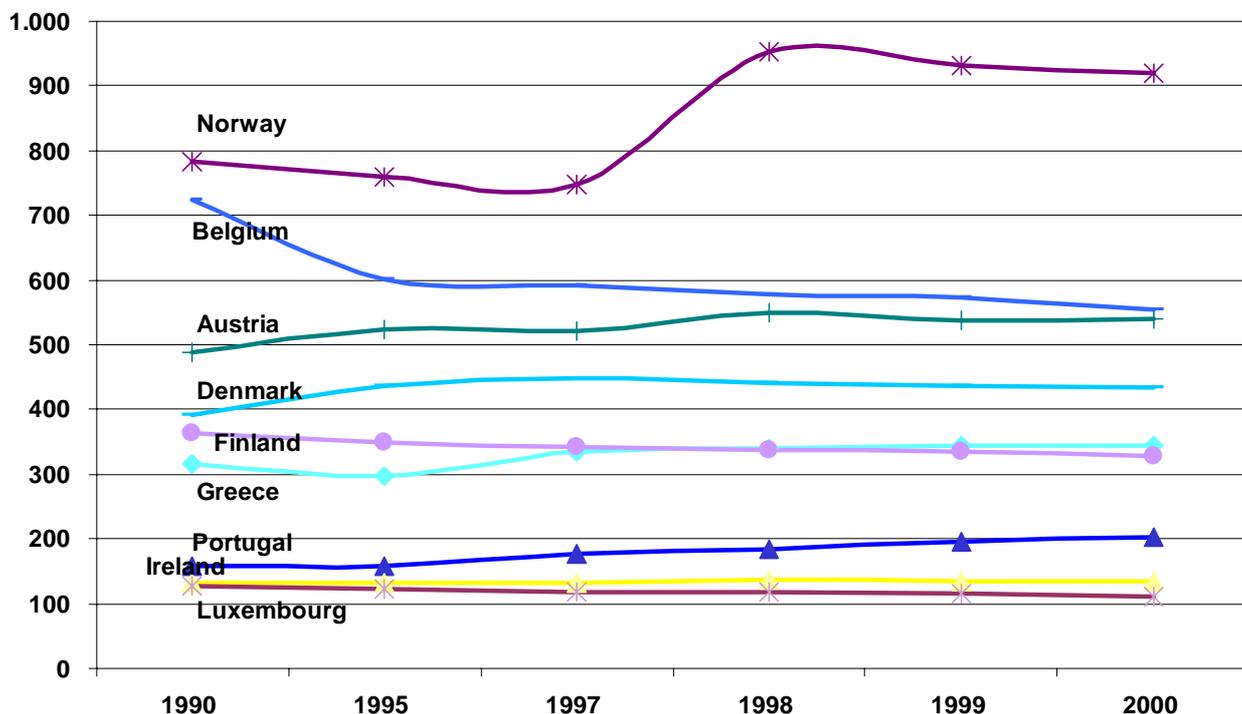


Source: Elaboration ACTA on Eurostat data 2002

The analysis of remaining nations shows different trends, although the general trend is positive. It come out that:

- Norway, Portugal, Denmark, Austria, Ireland, and Greece showed positive trends for the number of accommodation structures with percentages respectively equal to 17%, 29%, 11%, 3%, 3%, 9%;
- Belgium, Luxemburg e Finland showed negative trends respectively of -4%, -12%, -7%.

Graph 2.9 - Trend of camp site structures in nine European countries



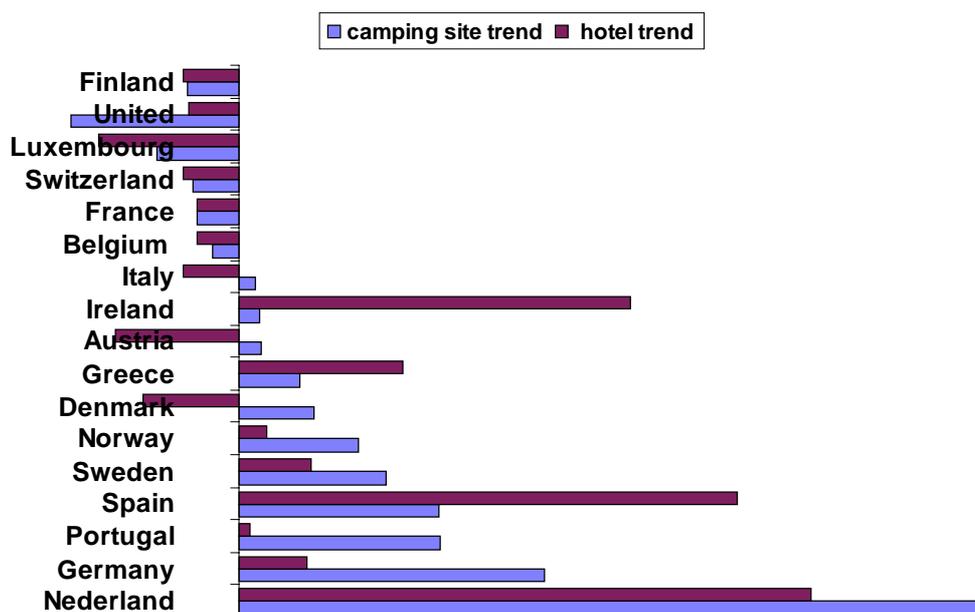
Source: Elaboration ACTA on Eurostat data 2002

#### 2.1.4 Trend comparison between camp sites and hotel

If comparing Hotel variation vs. camp site variation between 1990 and 2000 the outcome is that:

- In the countries that showed positive trends in camp site number, most of them in Northern Europe, the variation in hotels number is generally positive but less so than camp sites' (Norway, Germany, Holland, Sweden );
- The countries that showed a negative variation in camp sites in the time span under scrutiny demonstrate a variation of the same sign, generally also proportional, in hotels numbers. (Finland, Luxemburg, Switzerland, Belgium);
- In particular it is interesting to notice that Denmark, in the period 1990-2000, showed proportional trends for the two variables, but with opposite sign (11% positive trend for camp sites; -14% negative trend for hotel); In contrast, in Germany to the variation of hotels number of just 10% corresponds a more than proportional variation of camp site number (45%); in Spain results are the opposite (73% for hotels, 29% for camp sites); both France and UK show negative trends for both hotels and camp sites; in Italy a decrease of hotels is contrasted by a slight increase of camp sites.

Graph 2.10 - Trend comparison between camp site and hotel

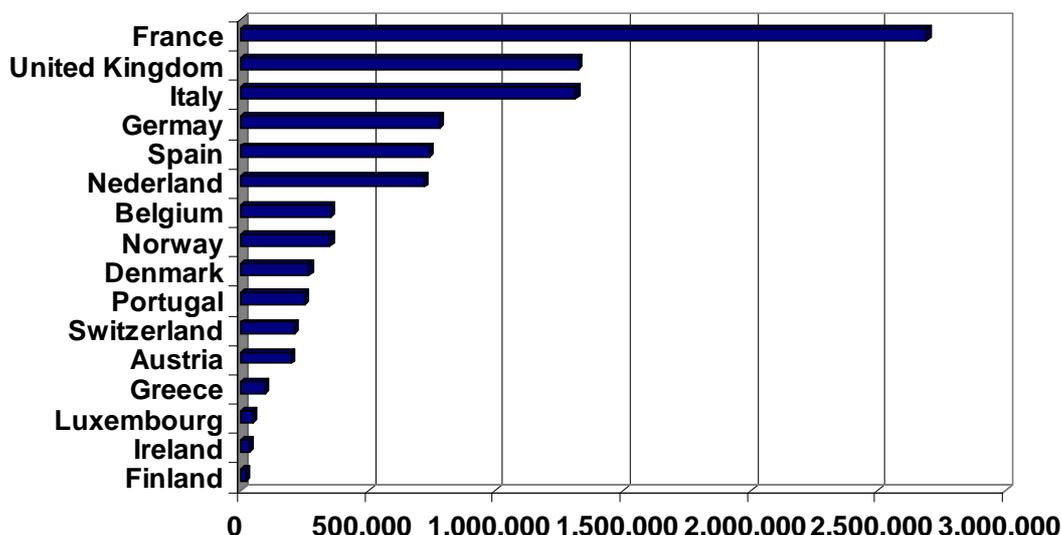


Source: Elaboration ACTA on Eurostat data 2002

### 2.1.5 Distribution of bed places in European Countries

The distribution of the number of beds in camp sites is similar to the distribution of the establishments. France has the most (28,65%) followed by UK (14,09%) and Italy (13,98%).

Graph 2.11 - Distribution of bed places in Europe<sup>4</sup>



Source: Elaboration ACTA on Eurostat data 2002

2.1.6 Trend of bed places in camp sites in medium – long period

The distribution of trends for bed places in camp sites is not entirely similar to the distribution of trends for the number of camp sites. The outcome is :

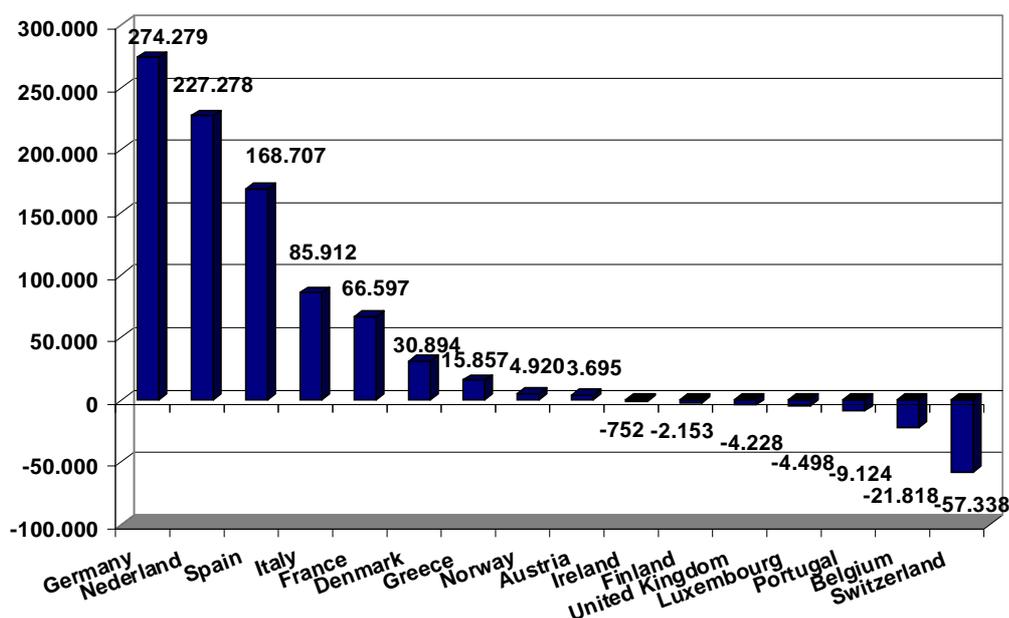
- in Holland bed places have increased but the percent increase (46%) is approx. half lower than the one of the increase in the number of camp sites. (109%);
- in contrast in Germany and Spain the relationship between the two positive trends equals approx. one.: the increase in the number of bed places was proportional to the increase in the number of camp sites.
- in Italy during the ten years under scrutiny it results that, against a small increase of camp sites (2%), bed places increased of approx. 7%;
- in France camp site number decreased but bed places increased;
- in UK the negative trend of camp site number is balanced by the stability of the number of bed places;
- Switzerland, Luxemburg and Belgium show a proportional decrease in number of both bed places and camp sites ;
- Portugal shows instead a strong increase in camp site number with a negative trend of bed places.

In short two prevalent outcomes appear:

<sup>4</sup> The data of the following countries refer to the latest available year : Greece (1999); Ireland (1997); Switzerland (1999); Denmark (1999).

- *concentration* of accommodation structures: to a concentration of accommodation structures corresponds an increase of the average dimension, either due to the increase of bed places (France) or due to a constant number of bed places (UK);
- *expansion* of accommodation structures: to a stability or slight increase of camp sites corresponds a substantial increase of bed places, with consequent increase of the average dimension. This is what happens in Germany, Greece, Italy, Denmark, Spain.
- *Enhanced overall offer*: This is what happens in Holland, Norway, Portugal, Ireland, Austria.

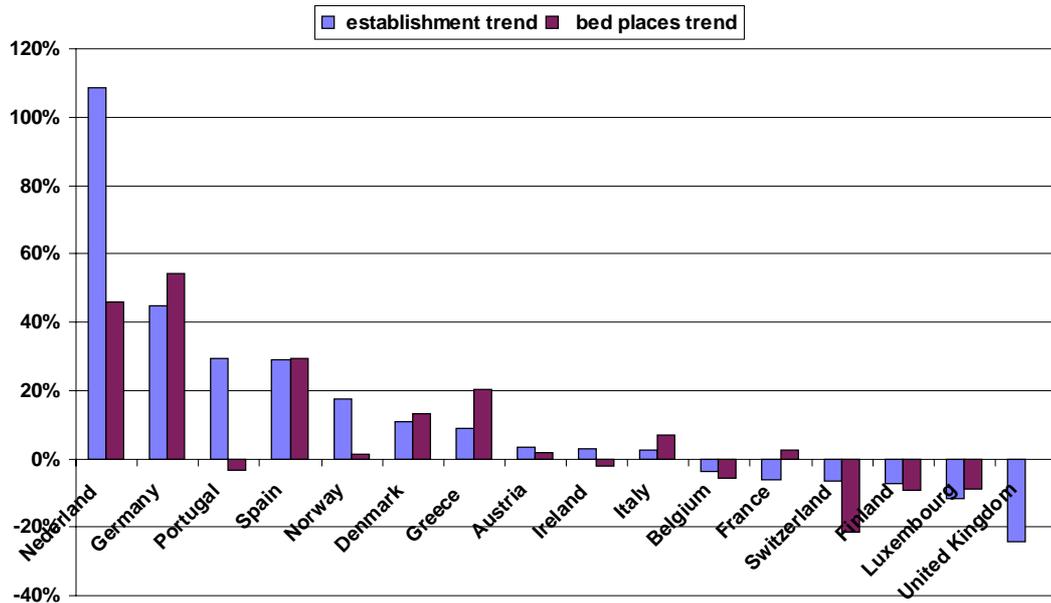
**Graph 2.12 - Variation in the number bed places in camp sites from 1990 to 2000<sup>5</sup>**



Source: Elaboration ACTA on Eurostat data 2002

<sup>5</sup> The variations registered in the number of hotels refer to the years 1995 -2000 with the exception of : Greece (1990-199); Austria (1997-2000); Ireland (1998-2000); Switzerland (1990-1999).

Graph 2.13 - Trend comparison between establishment and bed places (2000)

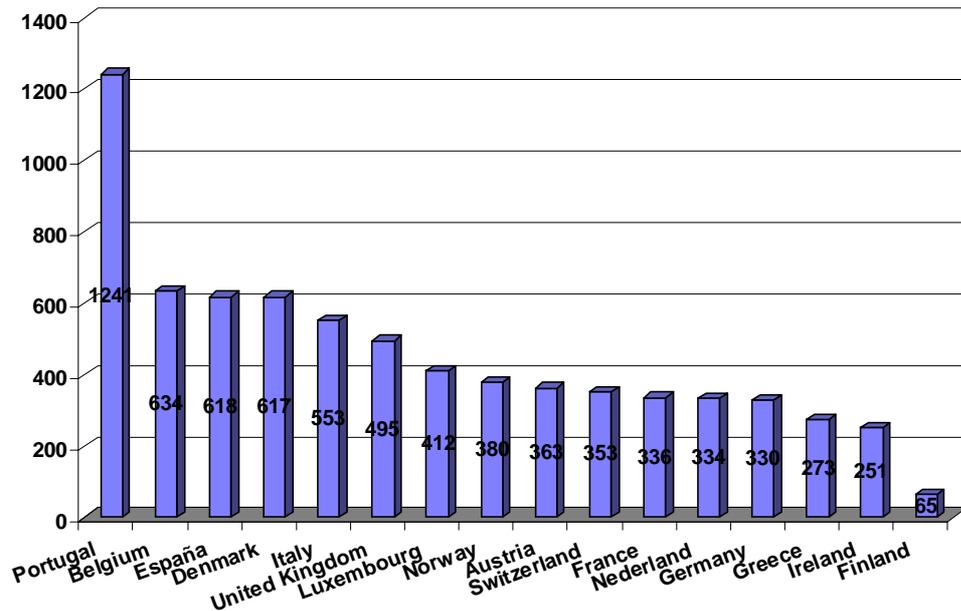


Source: Elaboration ACTA on Eurostat data 2002

### 2.1.7 Average dimension

The average density of camping places in Europe in the year 2000 is 390,56 bed places per camp site. Belgium, Spain, Denmark, Italy and UK show a rather homogeneous average density varying from 650 and 500 units approx.. The only exception being Portugal with an average density of 1241 units, which equals approx. the double of the average of the countries with highest density. Finland with an average density of 65 units is the European country with the lowest number of bed places per structure. .

Graph 2.14 – Average density (2000)



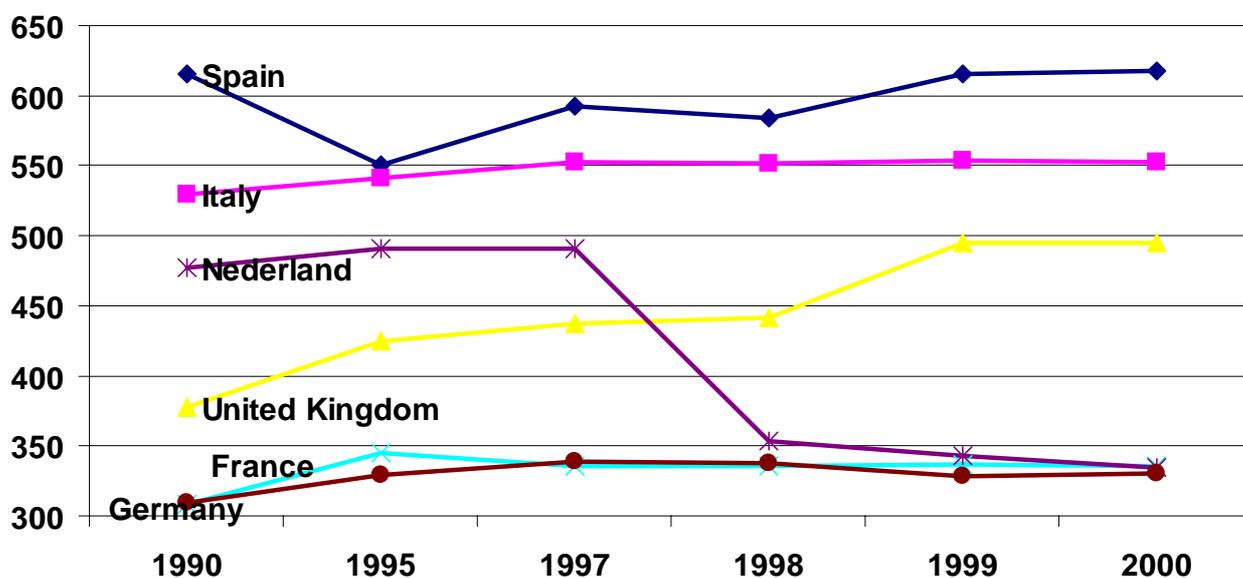
Source: Elaboration ACTA on Eurostat data 2002

2.1.8 Trend of average dimension in the medium-long period

The following graph represents the variation of the average dimension of camp sites from 1990 to 2000 in the 6 most relevant countries on the offer side. The outcome is that in 2000 vs. 1990:

- in Holland there was a sharp contraction of the average dimension of camp sites, together with a parallel increase of receptivity offer in absolute terms.
- in UK the average dimension increased following a decrease of accommodation offer and stability in bed place numbers;
- in France, Italy, Germany the average dimension increased
- in Spain the average dimension stayed unchanged

Graph 2.15 - Variation of average dimension in 6 countries form 1990 to 2000



Source: Elaboration ACTA on Eurostat data 2002

## 2.2 Camp site market

### 2.2.1 Tourist market in Europe

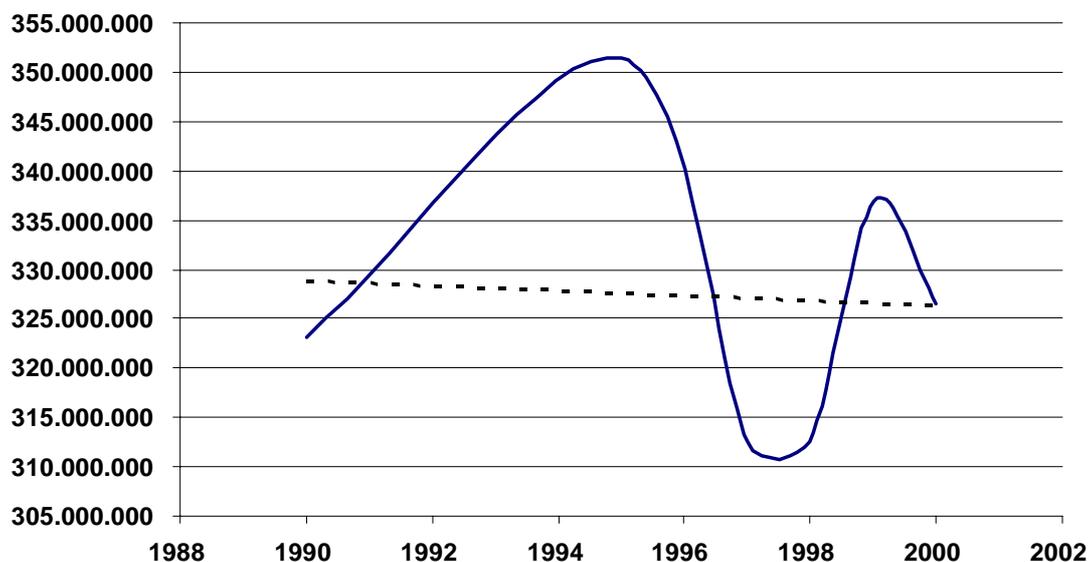
In Europe the overall overnight stays in all types of accommodation in 1998 were approx. 1.750.000.000, the arrivals approx. 423.000.000. The overall average length of stay is 4,12 days.

In 2000 the overall overnight stays in camp sites is 326.589.019.

In the latest ten years the number of overnight stays increased of 1%: in 2000 the figure of the number of overnights stays was of 3.538.766 more than ten years before.

The trend in the years in between was not uniform. As shown in the graph 3.16, there are four distinct moments:

- 1990-1995 with the highest increase, in 1995 amounting to 9% more than 1990, i.e. almost 30 millions overnight stays more;
- 1995-1997 when the trend reverses: in 1997 overnight stays dwindle (-11% in 1997 vs. 1995);
- 1998-1999 when a new increase takes place (+8% in 1999 vs. previous year);
- 1999-2000 when the trend reverses again (-3% in 2000 vs. previous year).

**Graph 2.16 - Trend of overnight stays from 1990 to 2000**

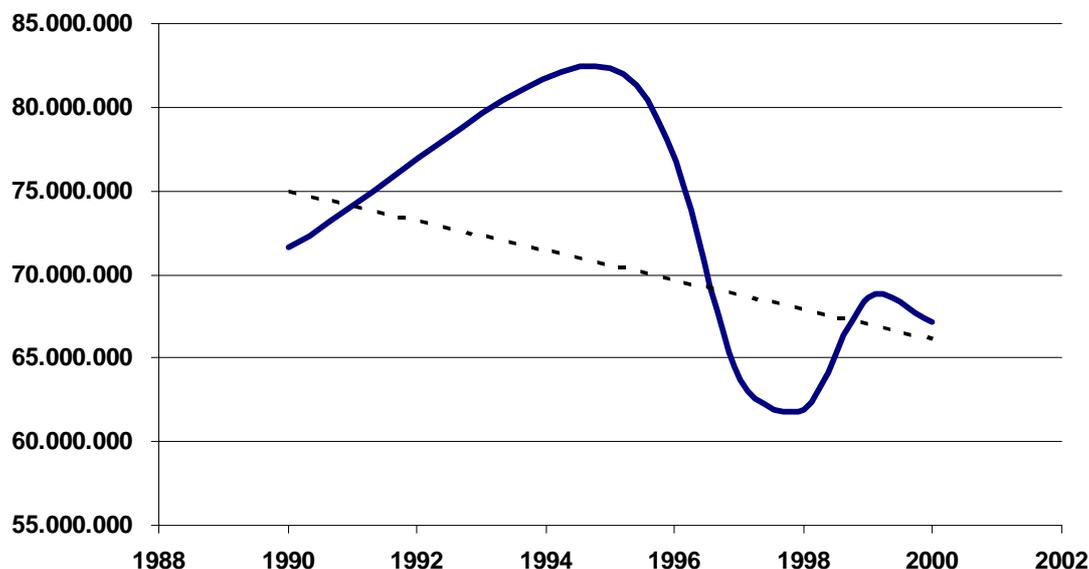
Source: Elaboration ACTA on Eurostat data 2002

In 2000 the arrivals figure in camp sites is 67.134.451.

In the latest ten years the figure of arrivals dwindled of -2%, i.e. in year 2000, 4.526.811 less vs. 1990.

Also in this case the trends in the latest ten years was not uniform, as shown in graph 2.17. Therefore four moments can be spotted:

- 1990-1995, with a positive trend in arrivals (+15% in 1995 vs. 1990);
- 1995-1998, with a sharp counter-trend (-30% in 1998 vs.1995);
- 1998-1999, the trend reverses (+11% in 1999 vs. 1998);
- 1999-2000, the trend reverses again (-2% in 2000 vs. al 1999).

**Graph 2.17 - Trend of arrivals from 1990 to 2000**

Source: Elaboration ACTA on Eurostat data 2002

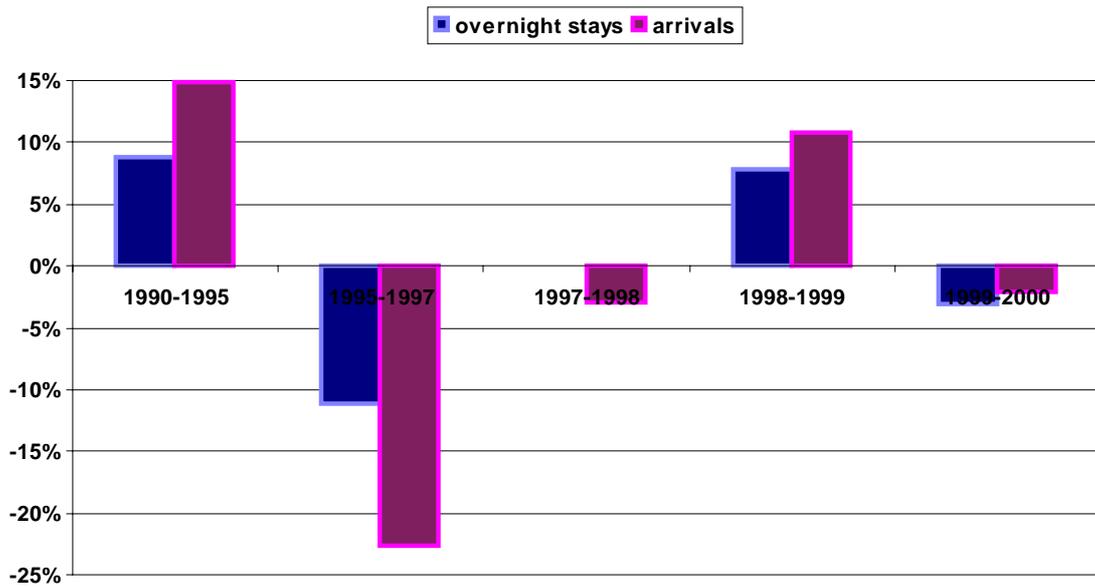
Therefore it can be maintained that from 1990 to 2000, in face of dwindling arrival numbers in camp sites, overnight stays have increased slightly more than in proportion. In general, as shown in the graph 2.18, the trend of the two variables in the ten years under scrutiny is approx. similar: typically to increasing/dwindling figures of arrivals correspond increasing/dwindling figures of overnight stays which are less than proportional.

Five moments can be distinguished:

- 1990-1995: arrivals increase, overnight stays increase less than in proportion.
- 1995-1997: arrivals dwindle, overnight stays dwindle less than in proportion.
- 1997-1998: while arrival dwindle, overnight stays stay unchanged
- 1998-1999: arrivals increase, overnight stays increase less than proportionally
- 1999-2000: the trend reverses: overnight stays dwindle more than in proportion to arrivals.



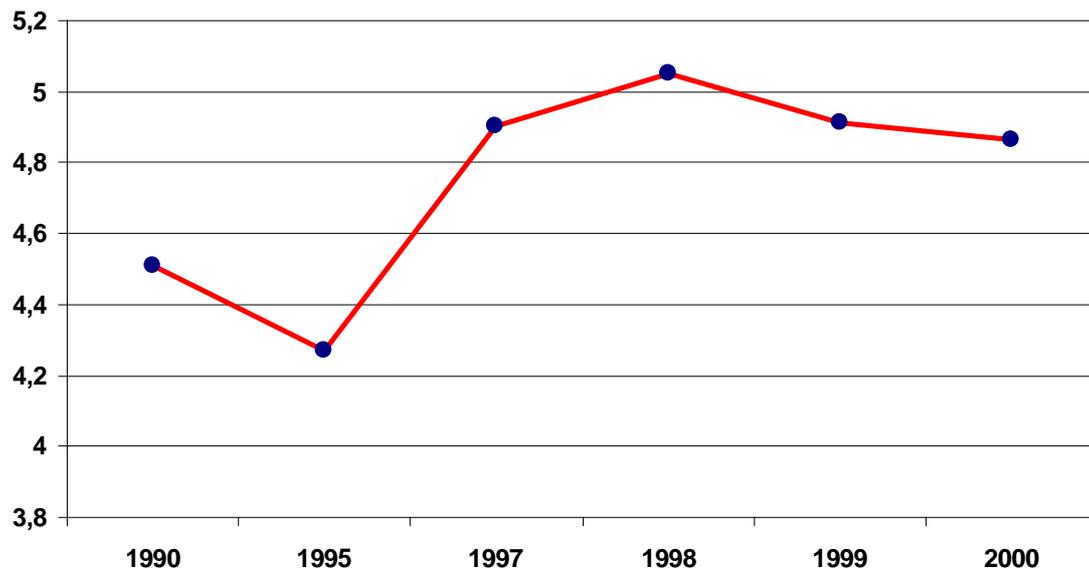
**Graph 2.18 - Comparison trend between overnight stays and arrivals**



Source: Elaboration ACTA on Eurostat data 2002

Therefore the emerging trend is a slight increase in the average length of stay in camp sites from 1990 to 2000, reaching 4,48 nights from 4,50. Actually, as shown in graph, 1998 is indeed the year when the maximum peak of more than 5 days is reached, this being the period when arrives dwindle but overnight stays remain constant:

**Graph 2.19 - Trend of average length of stay 1990-2000**



Source: Elaboration ACTA on Eurostat data 2002

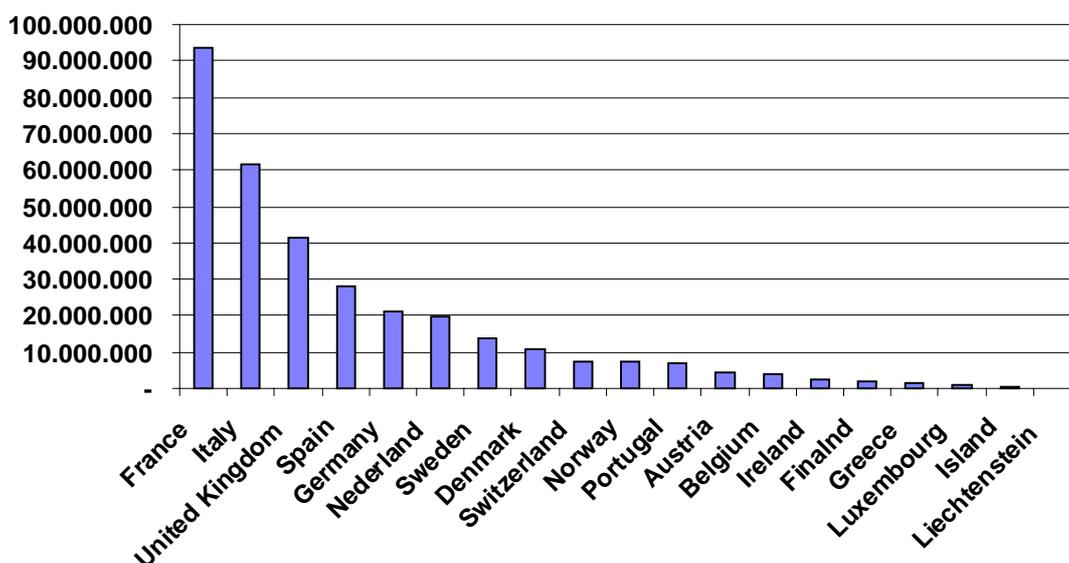
2.2.2 Distribution of Tourist market in European countries

France, Italy, UK, Spain, Germany, Holland absorb together more than 80% of tourist demand

The largest number of overnight stays is registered in France, with the 29% of overnight stays in Europe, followed by the Italy and UK with 19% and 13% respectively.

Liechtenstein, Island, Luxembourg, Greece, Finland are the countries with a percent lower than 1% of the total.

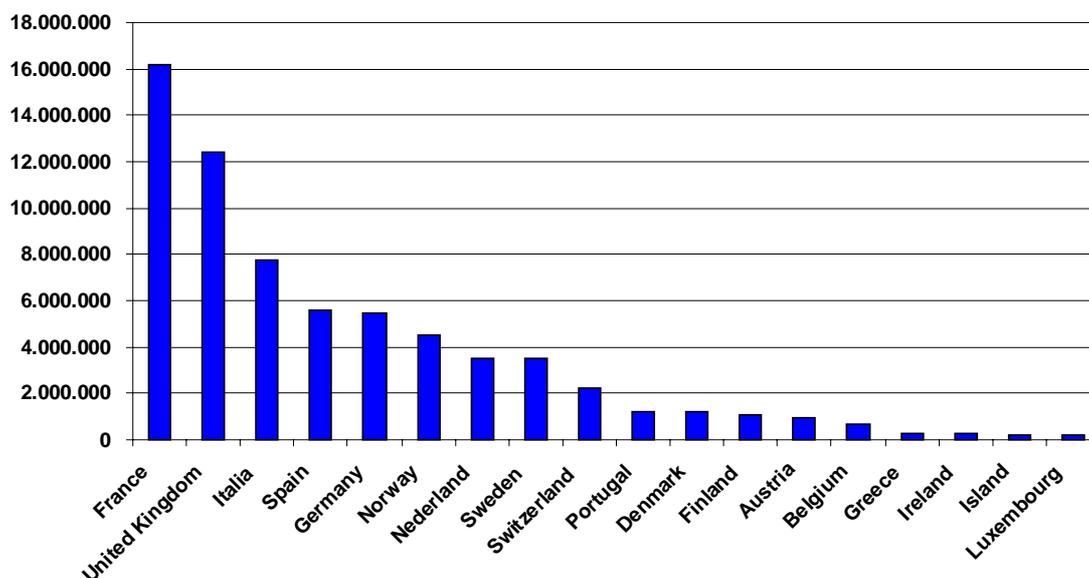
**Graph 2.20 – Distribution of overnight stays in European countries (2000)**



Source: Elaboration ACTA on Eurostat data 2002

As illustrated in the following graph (Graph 2.21), the distribution of arrivals is not homogeneous with the distribution of overnight stays: for instance, in UK arrival figures are high, but overnight stays are fewer than in Italy; in Norway the figure of overnight stays is much less than arrivals’.

**Graph 2.21 - Distribution of arrivals in European countries (2000)**



Source: Elaboration ACTA on Eurostat data 2002

### 2.2.3 Trend of overnight stays in medium – long period

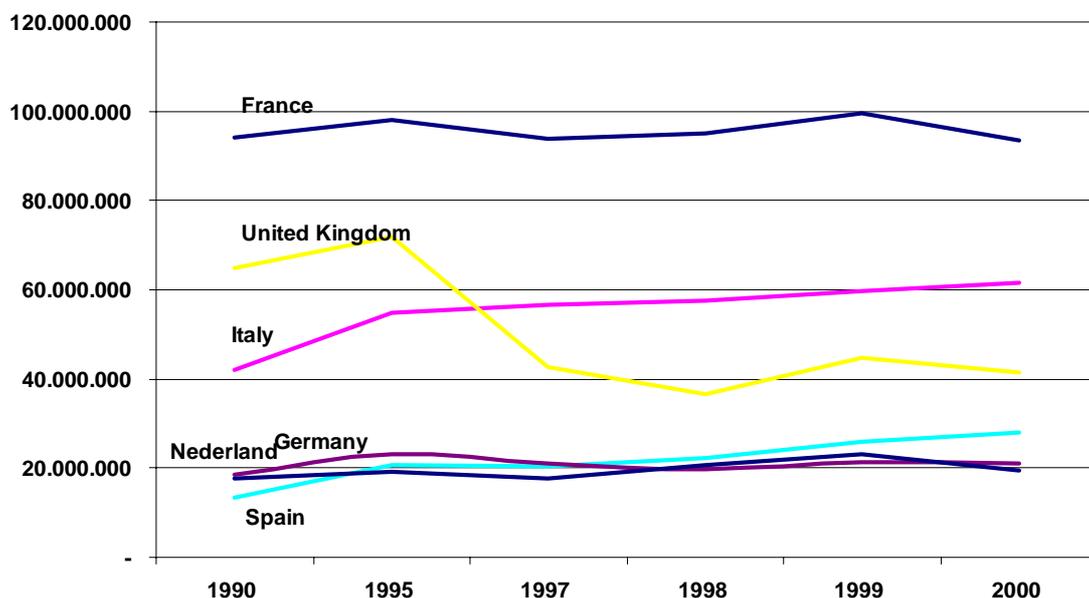
For the medium-long period trend, the last 10 years were examined, from 1990 to 2000; exceptions are notified with notes.

From the analysis it can be seen that:

The trend in camp sites has been inhomogeneous in the different countries: seven have undergone a positive trend, nine a negative one.

If the analysis of the variation of tourist flows is focused only on the 6 nations with the largest share of tourist demand, the outcome is that in France from 1990 to 2000 the trend was nearly constant, unlike UK where in the ten years under scrutiny the trend was negative, amounting to 32%. In Italy the number of overnight stays in the time span under scrutiny increased constantly, registering in the year 2000 a 20 million overnight stays increase. The highest increase was in Spain (+108%) Germany and Holland follow a similar tend, decreasing at the beginning but then settling at the initial values in the year 2000.

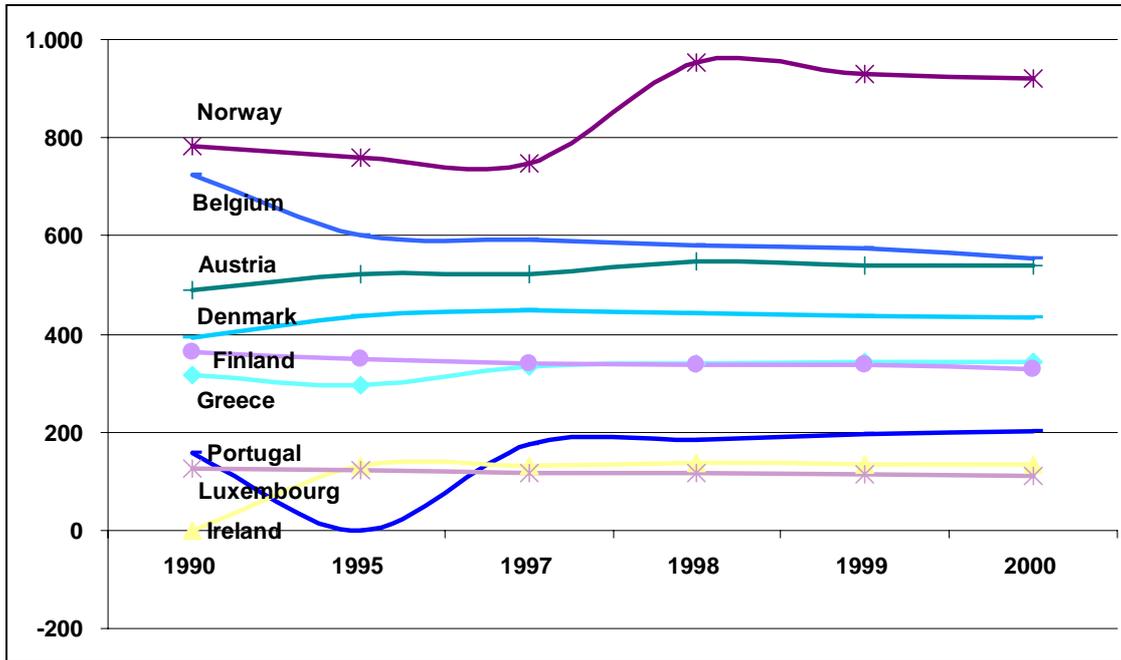
**Graph 2.22 - Variation of the number of overnight stays in 6 countries from 1990 to 2000**



Source: Elaboration ACTA on Eurostat data 2002

If the analysis is focused on the 6 nations where the overall demand of tourist flows includes no more than 8% of entire market, it appears clearly that they are also the nations that in the latest ten years featured negative trends. Belgium is the country that from 1990 to 2000 featured the most negative trend (-69%), followed by Greece (- 32%) and Austria (- 30%). Norway is an exception and in the last ten years as the tourist demand grew approx. 41%.

**Graph 2.23 - Variation of the number of overnight stays in 9 countries from 1990 to 2000**

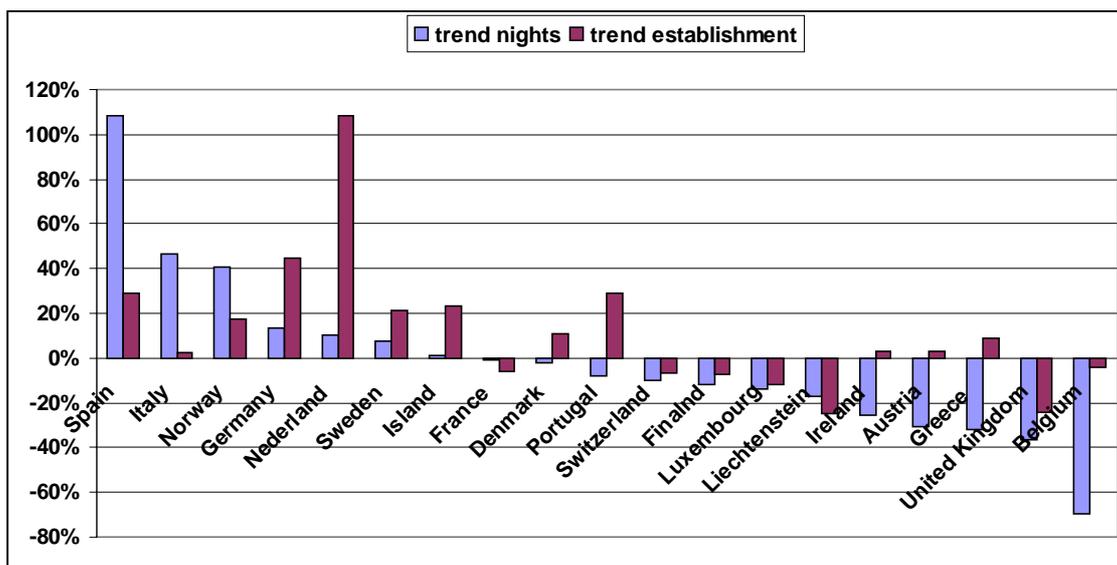


Source: Elaboration ACTA on Eurostat data 2002

#### 2.2.4 Comparison of trend between establishment and overnight stays

In the majority of countries under scrutiny, the variable “establishment” and the variable “overnight stays” show trends of equal sign, unlike Denmark, Portugal, Ireland, Austria, Greece, where the negative trend in the figures of overnight stays is contradicted by the positive trend of structures. UK is the country where the trend is in absolute more negative.

**Graph 2.24 - Comparison trend between establishment and overnight stays (2000)**

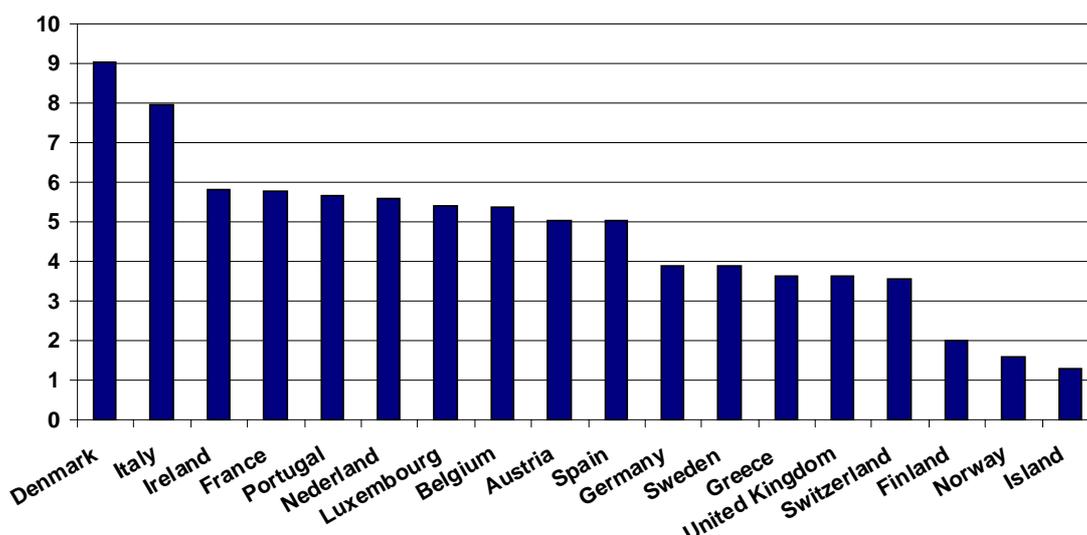


Source: Elaboration ACTA on Eurostat data 2002

### 2.2.5 Average length of stay

The average length of stay in European camp sites is 4,86 days in the year 2000. In Denmark the average length of stay reaches the highest value (9,04 days), followed by Italy (7,95). Ireland, France, Portugal, Holland, Luxemburg, Belgium e Spain feature approx. similar average values (between 5,40 and 5,80).

**Graph 2.25 – average length of stay in the European countries (2000)**

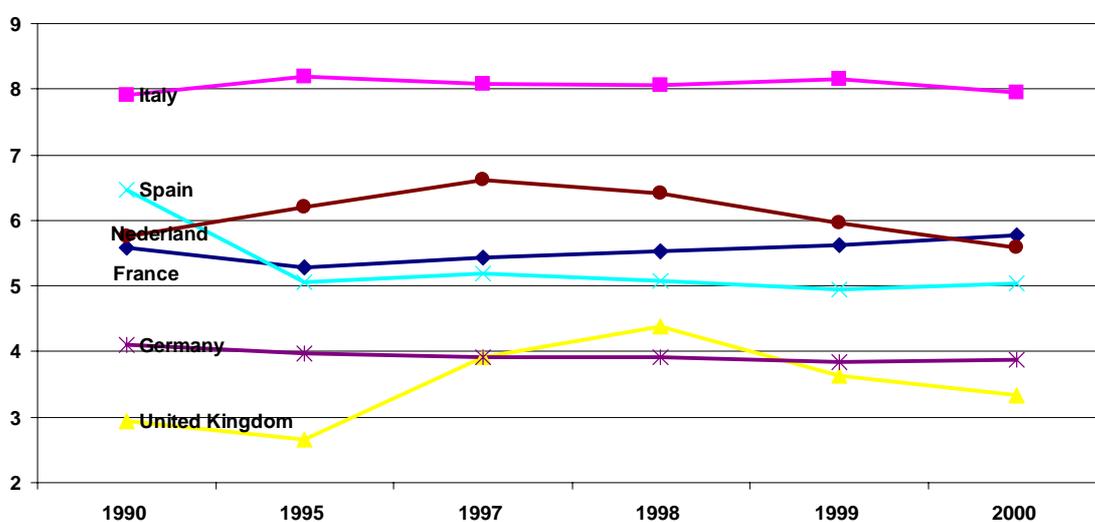


Source: Elaboration ACTA on Eurostat data 2002

### 2.2.6 Trend of average length of stay in the medium-long period

If the analysis is focused only on the 6 nations featuring the largest share of the tourist demand, the following graph shows that the average length of stay in camp sites from 1990 to 2000 increased in some countries (Italy, France, UK) and dwindled in others (Spain, Holland, Germany). In particular, in the year 2000 the country featuring the most positive trend in comparison to the previous ten years was UK (+14%), although this figure is dwindling already starting 1998; conversely in the year 2000 the country featuring the most negative trend in comparison to the previous ten years is Spain (-22%), although in the last year the trend has slightly reversed.

**Graph 2.26 - Variation of average length of stay in 6 countries from 1990 to 2000**



Source: Elaboration ACTA on Eurostat data 2002

## 2.3 Region distribution

The following table (Table 2.2.) shows for each European country the macro-region and the region featuring the highest concentration of accommodation structures and bed places. Within each macro-region the relevant region with the maximum concentration is indicated (in italic) typically this region is the same as the region that features the maximum concentration in absolute.

**Table 2.2 - Region distribution**

	Max establishment concentration		Max bed places concentration	
	Macro region	Region	Macro region	Region
<b>Belgium</b>	Région Wallonne Wallony	Luxembourg (B)	Vlaams Gewest	West-Vlaanderen
	<i>Luxembourg (B)</i>		<i>West-Vlaanderen</i>	
<b>Denmark</b>		Nordjyllands amt		Nordjyllands amt
<b>Switzerland</b>		Valais		Vaud
<b>Norway</b>		Vestlandet		Sør-Østlandet

<b>Iceland</b>		<b>Sudurland</b>		
<b>United Kingdom</b>	<b>South West</b>	<b>Cornwall and Isles of Scilly</b>	<b>South West</b>	<b>Dorset and Somerset</b>
	<i>Cornwall and Isles of Scilly</i>		<i>Dorset and Somerset</i>	
<b>Sweden</b>		<b>Västsverige</b>		
<b>Finland</b>	<b>Manner-Suomi</b>	<b>Pohjois-Suomi</b>	<b>Manner-Suomi</b>	<b>Itä-Suomi</b>
	<i>Pohjois-Suomi</i>		<i>Itä-Suomi</i>	
<b>Portugal</b>	<b>Portugal (Continent)</b>	<b>Centro ( )</b>	<b>Portugal (Continent)</b>	<b>Lisboa e Vale do Tejo</b>
	<i>Centro</i>		<i>Lisboa e Vale do Tejo</i>	
<b>Austria</b>	<b>Westösterreich</b>	<b>Kärnten</b>	<b>Westösterreich</b>	<b>Kärnten</b>
	<i>Tirol</i>		<i>Tirol</i>	
<b>Holland</b>	<b>Oost-Nederland</b>	<b>Gelderland</b>	<b>Oost-Nederland</b>	<b>Gelderland</b>
	<i>Gelderland</i>		<i>Gelderland</i>	
<b>Luxembourg</b>		<b>Ardennes</b>		<b>Ardennes</b>
<b>Italy</b>	<b>Sud</b>	<b>Toscana</b>	<b>Nord Est</b>	<b>Veneto</b>
	<i>Puglia</i>		<i>Veneto</i>	
<b>Ireland</b>	<b>Southern and Eastern</b>		<b>Southern and Eastern</b>	
<b>France</b>	<b>Ouest</b>	<b>Languedoc-Roussillon</b>	<b>Méditerranée</b>	<b>Languedoc-Roussillon</b>
	<i>Bretagne</i>		<i>Languedoc-Roussillon</i>	
<b>Spain</b>	<b>Este</b>	<b>Cataluña</b>	<b>Este</b>	<b>Cataluña</b>
	<i>Cataluña</i>		<i>Cataluña</i>	
<b>Greece</b>	<b>Kentriki Ellada</b>	<b>Kentriki Makedonia</b>	<b>Kentriki Ellada</b>	<b>Kentriki Makedonia</b>
	<i>Peloponnisos</i>		<i>Peloponnisos</i>	
<b>Germany</b>	<b>Bayern</b>	<b>Oberbayern</b>	<b>Bayern</b>	<b>Oberbayern</b>
	<i>Oberbayern</i>		<i>Oberbayern</i>	

Source: Elaboration ACTA on Eurostat data 2002

## 2.4 The 10 new EU Countries

The following analysis deals with the 10 countries which newly entered the European union: Cyprus, Estonia, Latvia, Malta, Poland, Czech Republic, Slovakia, Slovenia, Hungary.

The offer and demand analysis in this paragraph focuses on the same variables as in the previous study for the 15 historic European Countries.

The study aims at:

- understanding the growth potential of the new countries;
- understanding the rate of tourism demand in camp sites which is addressed to them.

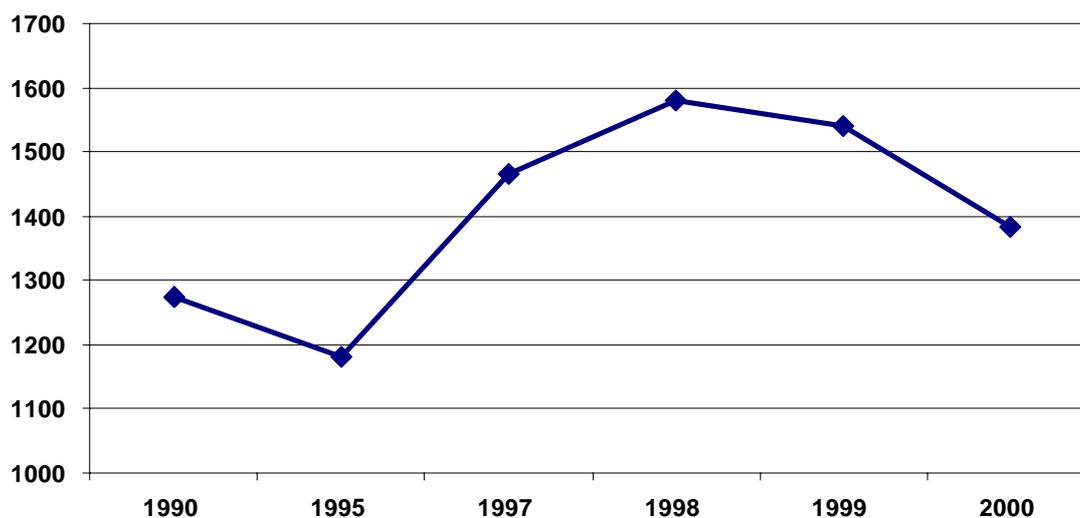
The time span of the analysis refers to a 10 years period (1990-2000) for the offer analysis, and to a shorter 5 years period for the demand analysis (1995-2000), as relevant 1990 data for most these countries are missing.

### 2.4.1 Tourist offer<sup>6</sup>

The number of accommodation establishments in 10 European Countries in 2000 is 1.383.

The following graph (Graph. 3.28) shown that in 10 years the camp site number increased little more than 8% (+108 structures). In 1998 the increase reached its highest peak, followed by a decrease till the year 2000.

**Graph 2.27 - Trend of distribution of camp site structures from 1990 to 2000**

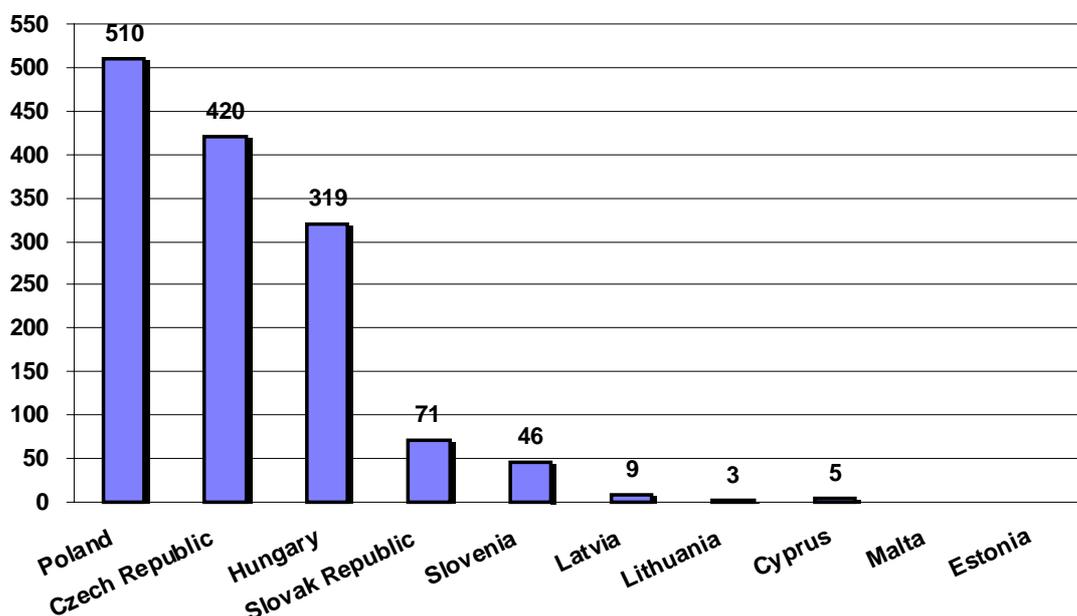


Source: Elaboration ACTA on Eurostat data 2002

The distribution is not homogenous: 90% is distributed only between 3 countries: Poland (36,88%), Czech Republic (30,37%) and Hungary (23,07%). The country with the least number of establishments is Latvia,22%).

<sup>6</sup> Data on accommodation structures and bed places are missing for Malta and Estonia.

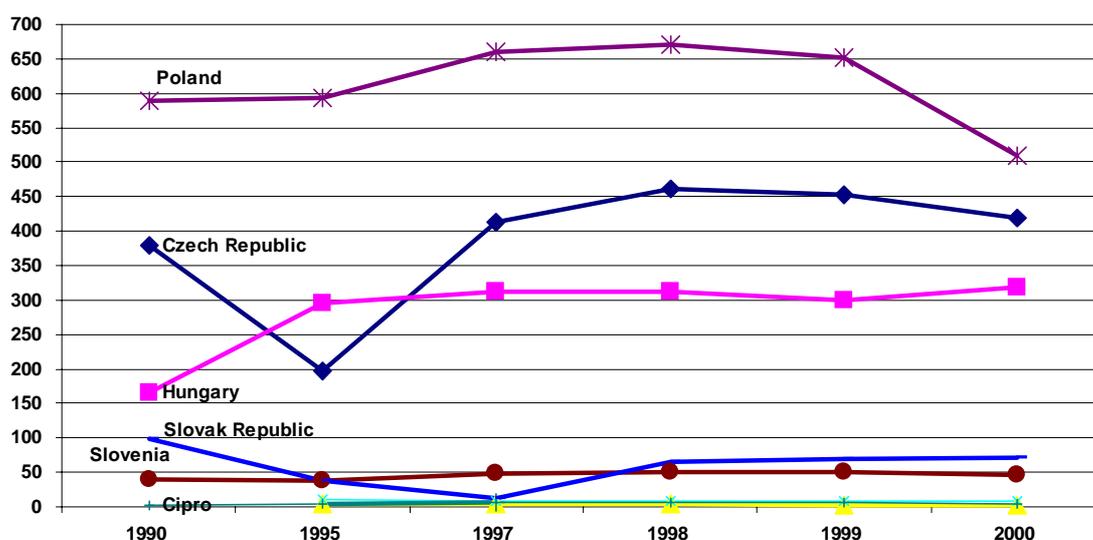
**Graph 2.28 - Distribution of camp sites in 10 European Countries (2000)**



Source: Elaboration ACTA on Eurostat data 2002

Therefore, as shown in the following graph, (Graph 3.28), excluding Poland, the increase concerned only such countries already absorbing the large majority of tourism offer, as Czech Republic and Hungary, whose growth rates are respectively 11% and 93%. Apart from Slovenia (+15%) in the other countries the accommodation offer in terms of structures decreased. In Poland the bed place number decreased 13% (-79 structures).

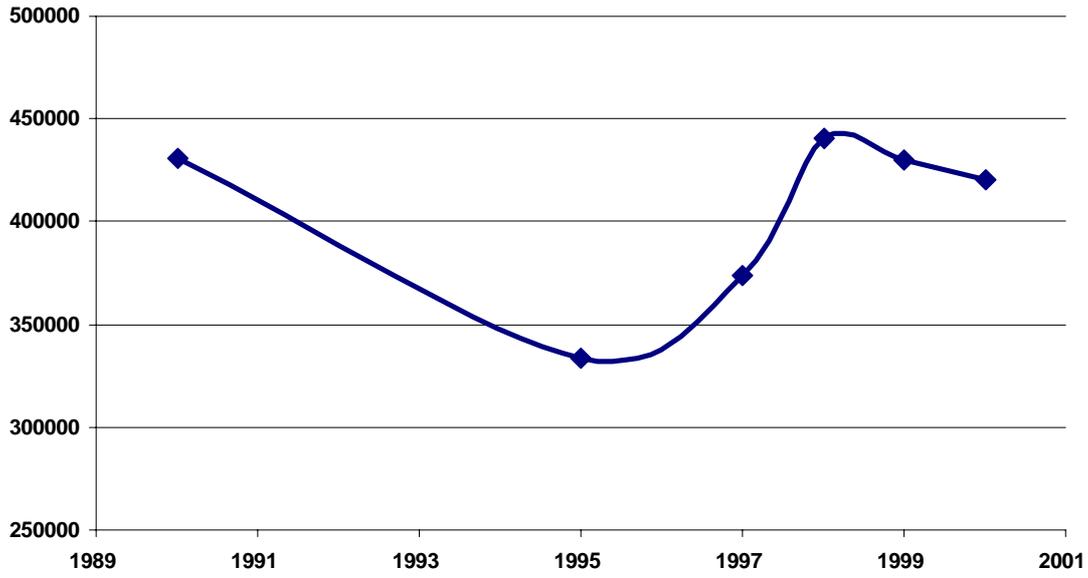
**Graph 2.29 - Trend distribution from 1990 to 2000**



Source: Elaboration ACTA on Eurostat data 2002

The number of bed places in 2000 is 421.043.  
 In the 10 years under scrutiny the number of bed places decreased 2% (-10.206 bed places). A strong decrease between 1990-1997 was followed by a significant increase till 1999.

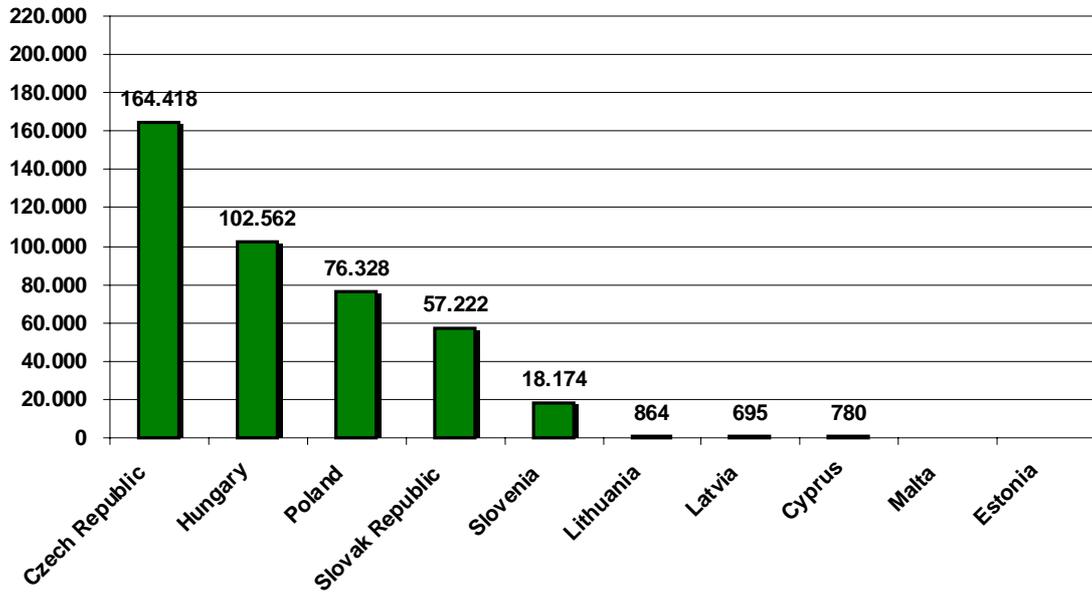
**Graph 2.30 - Trend of distribution of bed places from 1990 to 2000**



Source: Elaboration ACTA on Eurostat data 2002

The distribution of bed places in the 10 countries is consistent with accommodation structures', although less sharp since Slovenia and e Slovakia feature a significant market quota ( 4,32% e 13% respectively ). As shown in the graph. the ratio between the three most important countries is inverted : Indeed it is the Czech Republic (39,12%) that features the highest number in bed places, followed by Hungary (24,4%) and Poland (18,16%).

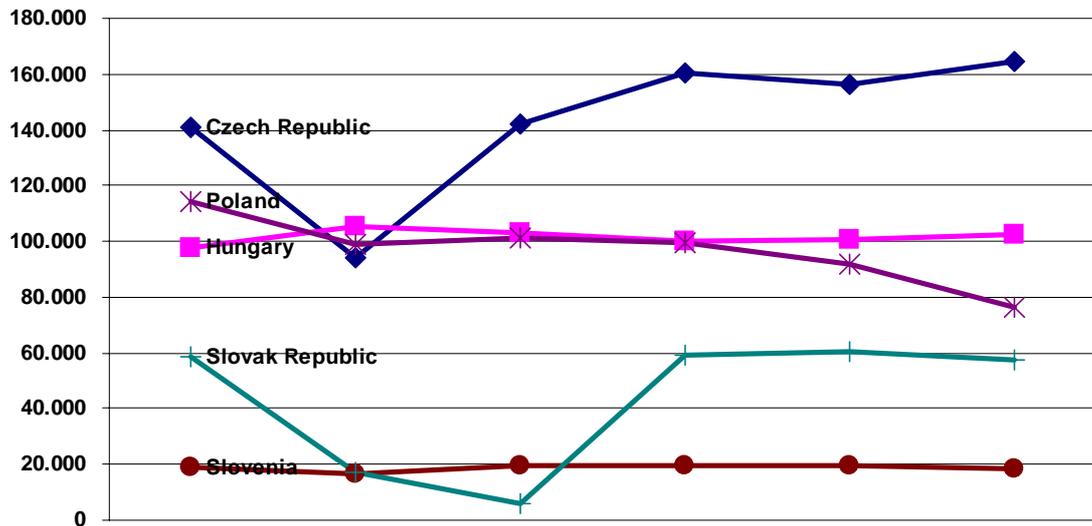
**Graph 2.31 - Distribution of bed places (2000)**



Source: Elaboration ACTA on Eurostat data 2002

The number of bed places increased only in the Czech Republic (17%), Hungary (5%). Poland shows a 33% (-38.152 bed places).decrease.

**Graph 2.32 - Trend of distribution of bed places from 1990 to 2000**

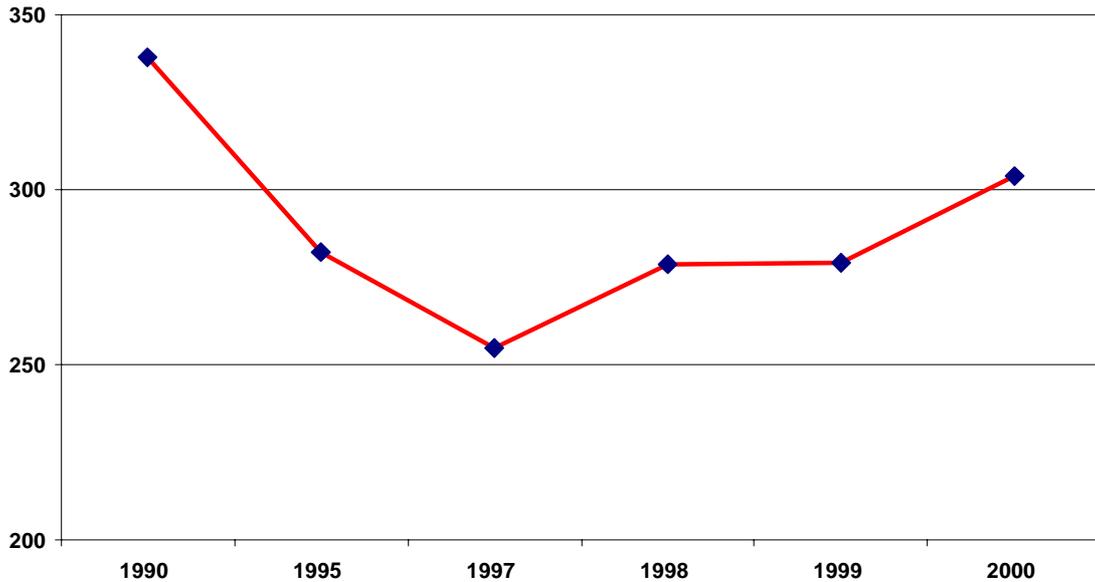


Source: Elaboration ACTA on Eurostat data 2002

2.4.2 Average dimension

Previous considerations show that the average dimension of camp sites has been dwindling between 1990 and 2000. The average dimension in the year 2000 is of 303,87 bed places per structure, approx. 34 bed places less vs. 1990. As shown in the following graph today's trend is on slight increase.

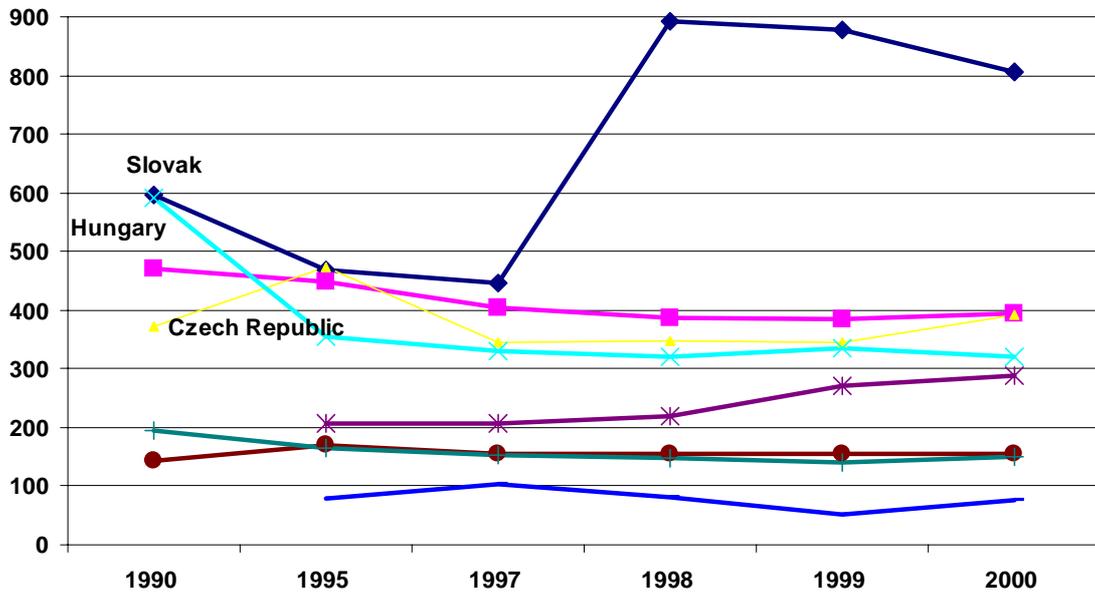
**Graph 2.33 - Trend of average dimension from 1990 to 2000**



Source: Elaboration ACTA on Eurostat data 2002

Slovakia is the one that had a strong increase in the dimension of accommodation structures: structures have decreased in number but bed places have increased.

Graph 2.34 - Variation of average dimension from 1990 to 2000



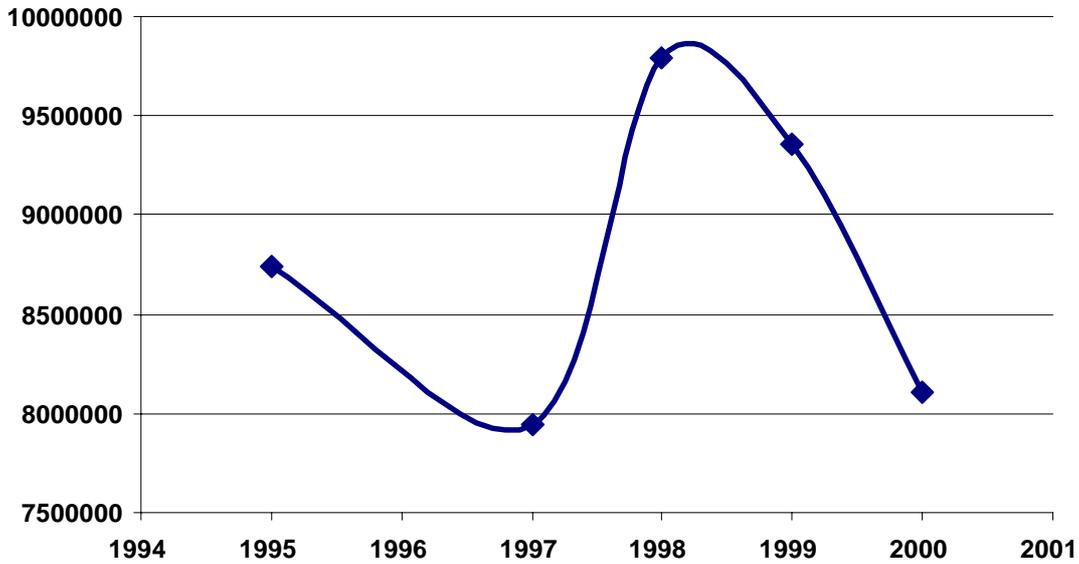
Source: Elaboration ACTA on Eurostat data 2002

### 2.4.3 Camp site Market<sup>7</sup>

The number of overnight stays in the year 2000 in the 10 European countries is 08.086. From 1995 to 2000 the trend was inhomogeneous, but negative as a whole: in 2000 overnight stays decreased 7%.

<sup>7</sup> Data on arrivals and overnight stays are missing for Malta and Cyprus.

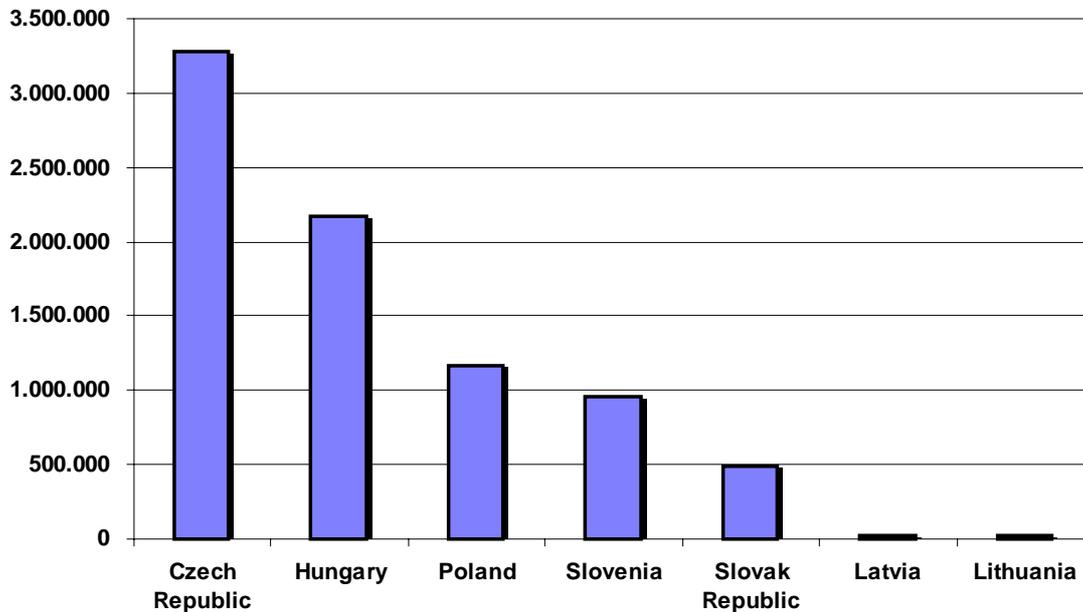
**Graph 2.35 - Trend of overnight stays from 1995 to 2000**



Source: Elaboration ACTA on Eurostat data 2002

70% of overall overnight stays in 2000 is towards the Czech Republic (40,46%) and Hungary (26,8%). Poland (14,35%), Slovenia (10,07%), Slovak Republic (6,1%) follow.

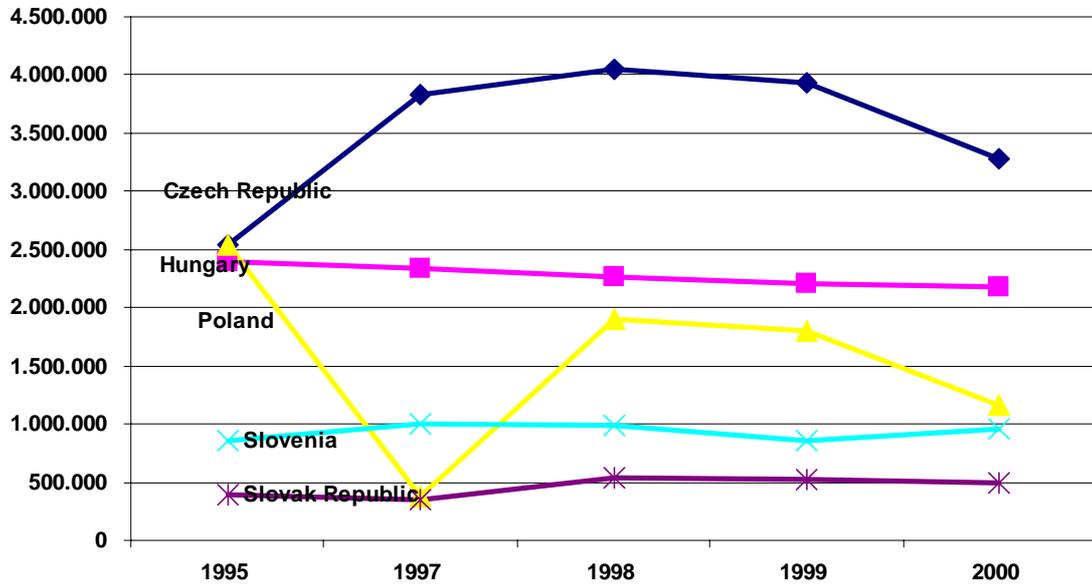
**Graph 2.36 - Distribution of overnight stays (2000)**



Source: Elaboration ACTA on Eurostat data 2002

Therefore only Czech Republic (29%), Slovenia (12%) e Slovakia (28%) show an increase in overnight stays.

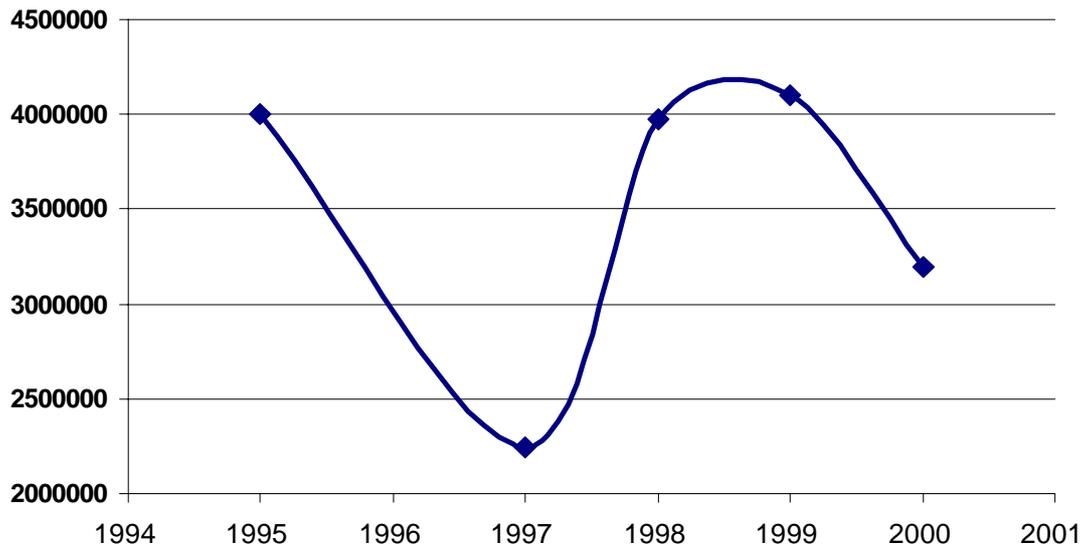
**Graph 2.37 - Trend of distribution of overnight stays from 1995 to 2000**



Source: Elaboration ACTA on Eurostat data 2002

The number of overnight stays in the year 2000 is 3.194.372. Also arrivals in the 5 years time span under scrutiny showed a 20% decrease.

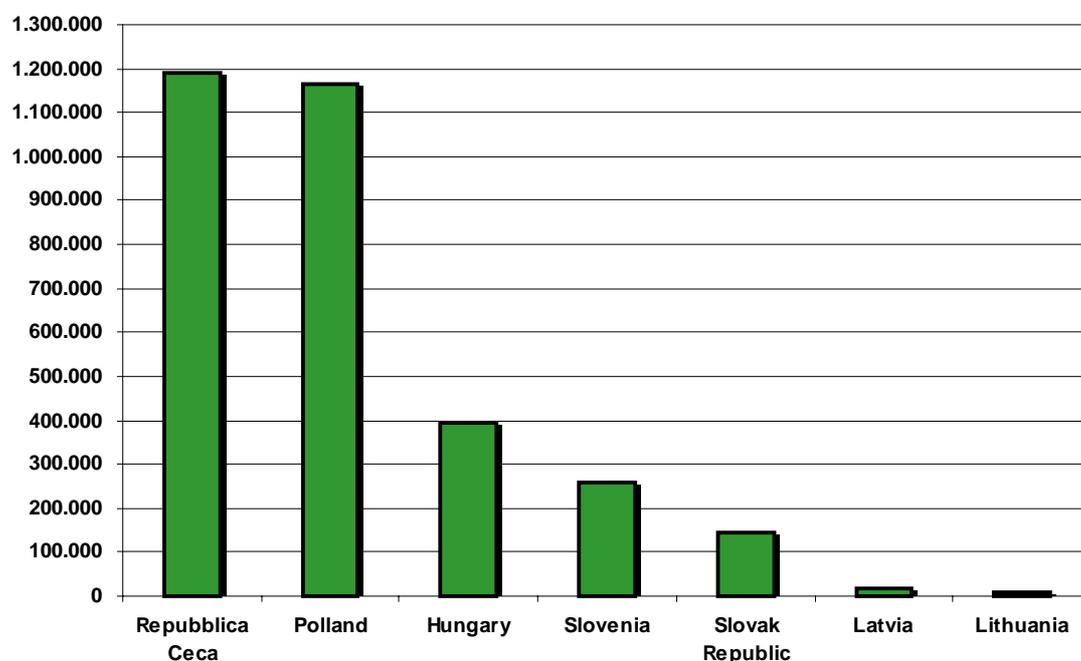
**Graph 2.38 - Trend of arrivals from 1995 to 2000**



Source: Elaboration ACTA on Eurostat data 2002

Arrivals are equally divided between Czech Republic and Poland at a 37% rate, followed by Hungary (14%) and Slovenia (8%).

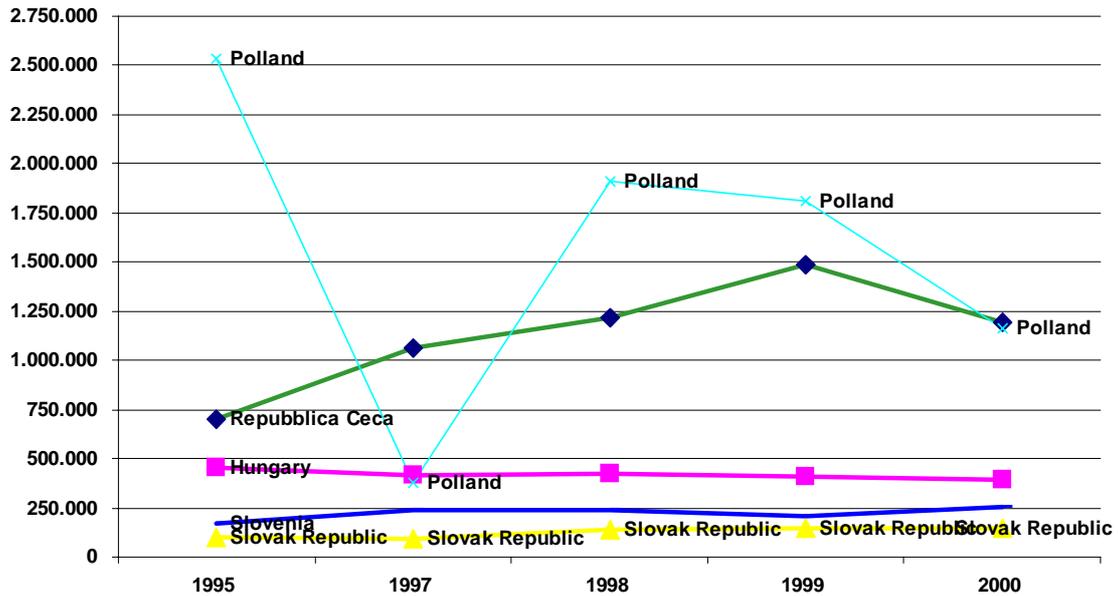
**Graph 2.39 - Distribution of arrivals (2000)**



Source: Elaboration ACTA on Eurostat data 2002

As shown in the following graph, in the latest 5 years the Czech Republic had a relevant increase ( 71% ) in arrivals unlike Poland whose trend in the same period is negative (-54%). Slovenia e Slovakia constantly increased arrivals numbers in the 5 years under scrutiny. .

**Graph 2.40 - Trend of distribution of arrivals from 1995 to 2000**

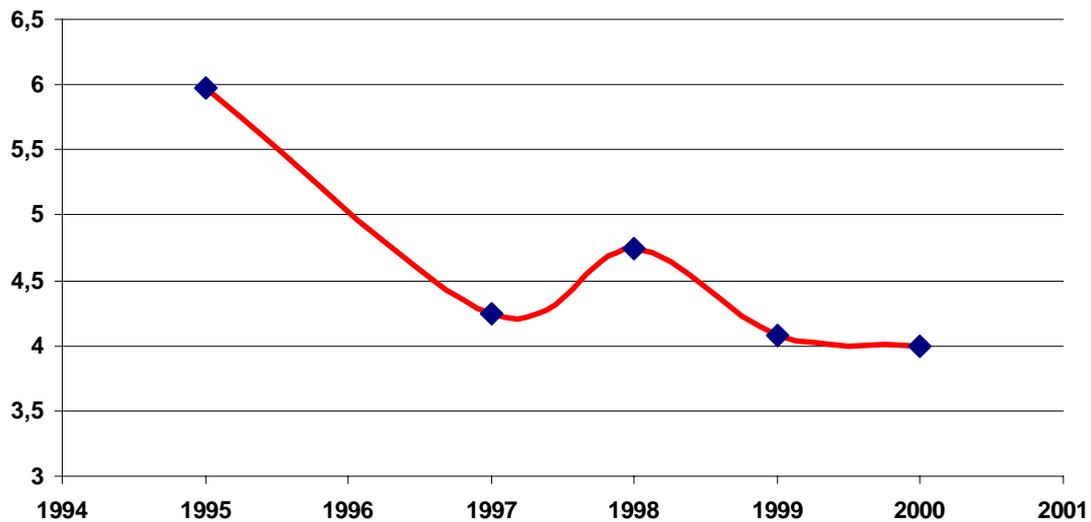


Source: Elaboration ACTA on Eurostat data 2002

2.4.4 Average length of stay

The graph shows that between 1995 and 2000 the average length of stay decreased from 6 to 4 days (-33,13%).

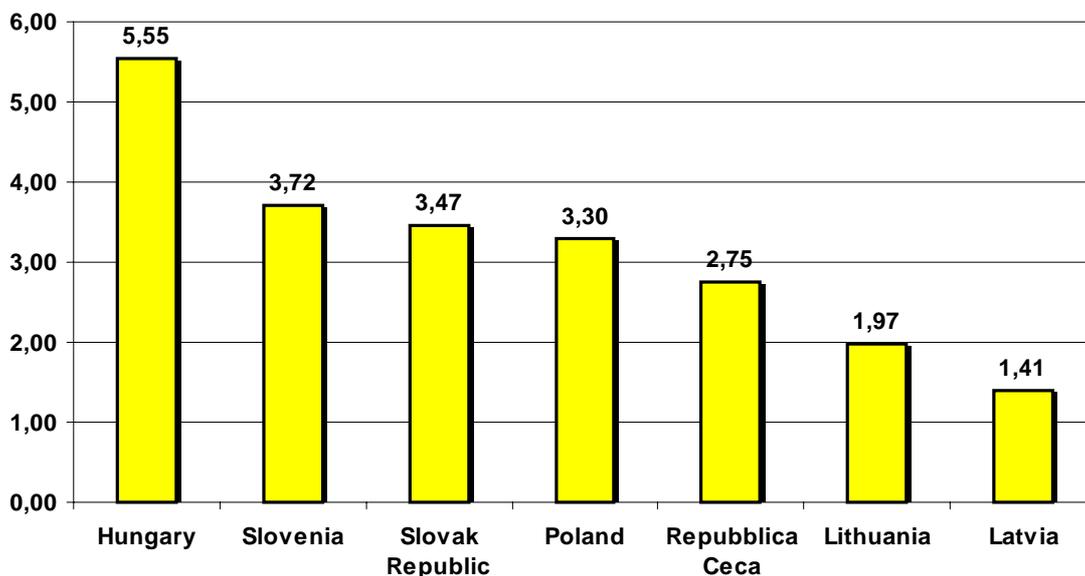
**Graph 2.41 - Trend of length of stay from 1995 to 2000**



Source: Elaboration ACTA on Eurostat data 2002

The countries featuring the longest average length of stay are Hungary (5,55 days) , followed with not less than 3 days Slovenia (3,72), Slovak Republic (3,47) and Poland (3,30).

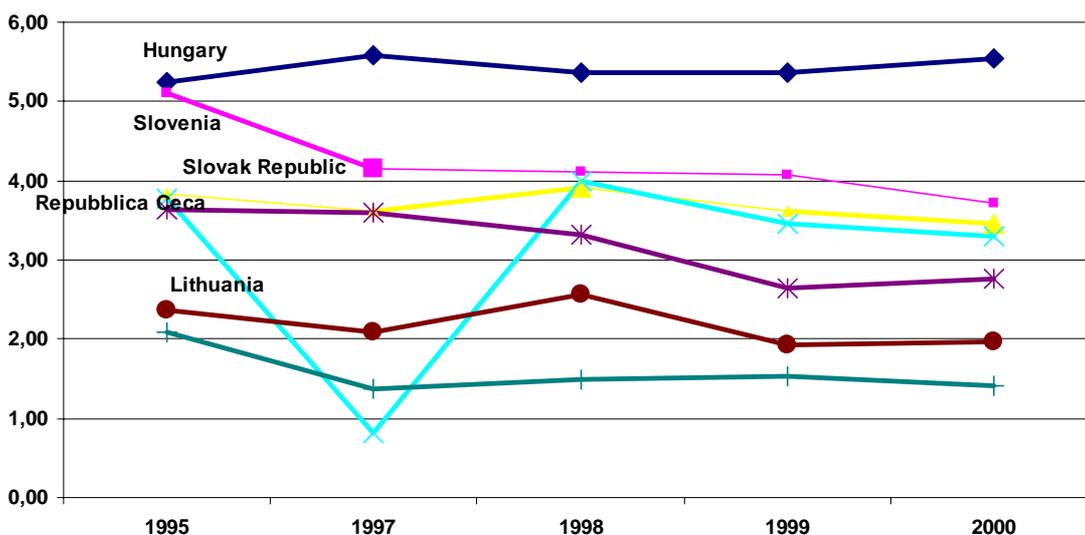
**Graph 2.42 - Distribution of length of stay (2000)**



Source: Elaboration ACTA on Eurostat data 2002

Therefore the only country featuring a positive trend in the average length of stay in camp sites is Hungary (+6%). For all other countries the trend is strongly negative as in Slovenia (-27%) and Czech Republic (-24%).

**Graph 2.43 - Trend of distribution of length of stay from 1995 to 2000**



Source: Elaboration ACTA on Eurostat data 2002

## 2.5 Conclusion

Camp sites make up 40% of the overall offer of bed places in European accommodation structures (5% of structures). 80% of the offer is distributed among France, UK, Italy, Germany, Holland, Spain and Sweden.

The main trends recorded between 1990 and 2000 are:

- increase in offer both in terms of bed places (+10%), and structures (+5%)
- increase in average dimension (from 374 bed places per camp site, to 390)
- stabilization and in some cases decrease of the offer in countries with more mature offer of camping places (mainly France and UK).

Camp sites are 20% of the European tourism market ( in terms of overnight stays ) Between 1990 and 2000 this market became stable and experienced a declining number of guests (-2%) and a strong increase of the average length of stay. (approx. 5 days)

Trends are different in different countries :

- Belgium, Greece, France and Austria show decreasing overnight stay figures between 130 and 60%;
- overnight stay figures in camp sites in Spain increased one and a half times between 1985 and 1998;
- also in Italy the increase of overnight stays is relevant, amounting to approx. 50%;
- increase in Germany is 12%
- the other countries show approx. unchanged figures.

Among the ten countries newly entered in the EU trends are:

- Hungary and Czech Republic are the ones that have invested more in camp site market in recent years;
- in the latest five years the Czech Republic registered a constant increase in arrivals;
- in absolute terms Poland is the country with the highest percentage of tourism demand but in time its potential has been dwindling;
- in recent years Slovakia developed a policy of expansion in the dimension of camp sites, in contrast with an overall contraction in the other countries.

## 3 Product Group definition for Camp Site Service

### 3.1 Nomenclature and classification

This chapter intends to introduce the classification of Camp Sites. The classification systems which will be briefly analysed are four: the ISIS Rev3.1, CPC 1.1, NACE Rev.1, the SICTA Standard International Classification of Tourism Activities, the TSP - Tourism-specific products and the Tourist Accommodation Establishments and Dwellings as stated in the Commission Decision of 9/12/1998 on the procedures for implementing Council Directive 95/57/EC on the collection of statistical information in the field of tourism.

#### 3.1.1 ISIC Rev 3.1 (Year of last revision: 2002)

**ISIC Rev3.1** (International Standard Industrial Classification of all Economic Activities) has the following classification according to main activity of the business:

- Tabulation Category: [H](#) - Hotels and restaurants

**Division: 55 - Hotels and restaurants ,**

**Breakdown:**

This Division is divided into the following Groups:

- [551](#) - Hotels; camp sites and other provisions of short-stay accommodation
- [552](#) - Restaurants, bars and canteens

Camp sites figure in **Class: 5510 - Hotels; camp sites and other provisions of short-stay accommodation.**

This class includes:

- provision of short-stay lodging in:
  - hotels, motels and inns
  - hotels with conference facilities
  - resorts
  - holiday chalets, cottages and flats
  - student houses, boarding schools
  - hostels for migrant workers
  - camping space and camping facilities, trailer camps
  - other short-stay lodging facilities such as guest houses, farmhouses, youth hostels, mountain refuges (shelters), etc.
- operation of sleeping cars when carried out by separate units

This class excludes:



- - rental of long-stay accommodation, (class 7010)
- - operation of sleeping cars as integrated activities of railway companies or other passenger transport facilities, (class 6010)

### 3.1.2 Ver.1.1 (Year of last revision: 2002)

**THE CPC code (Central Product Classification)** has an even greater hierarchy than ISIC. Its main classification parameter is the physical characteristics of the good or the main service rendered.

This is the complete breakdown of the classification:

- Section: [6](#) - Distributive trade services; lodging; food and beverage serving services; transport services; and utilities distribution services
- Division: [63](#) - Lodging; food and beverage serving services
- Group: [631](#) - Lodging services
- Class: [6319](#) - Other lodging services
- **Subclass: 63195 - Camping and caravanning site services**

#### Explanatory note

This subclass includes:

- lodging and related services provided by trailer and recreational vehicle parks, camp sites and similar facilities. Such services may include provision of the site only or of the site and the tent or trailer situated thereon.

This subclass does not include:

- long-term rental services of residential mobile home sites, (subclass 72111)
- rental services of caravans and trailers for use off-site, (subclass 73114)

### 3.1.3 NACE REV.1

**NACE Rev.1** (Statistical Classification of Economic Activities of the European Community) is a classification system adopted by the European Economical Community and EEC publishing as reference for the classification of economic activities. In 1990 it was made Regulation (EEC) N. 3037/90. Its implementation has become mandatory since January 1 1993.

Its main purpose was to establish a common statistical classification of economic activities within the European Union.

It also considers activities and gives a scheme in order to assess the central activity of the business. NACE defines the main activity of a business as the one which provides the highest value added to the business<sup>8</sup>.

The section H states Hotels and Restaurants<sup>9</sup>.

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<sup>8</sup> value added: the difference between the gross output less the cost material and other intermediate inputs.



- Hotels and restaurants
- [HA](#) Hotels and restaurants
- [55](#) Hotels and restaurants
- [55.2](#) Camp sites and other provision of short-stay accommodation
  - 55.21 Youth hostels and mountain refuges
  - 55.22 Camp sites, including caravan sites

Camp sites and other provisions of short-stay accommodation include:

- holiday camps, chalets and flats
- camping space and camping facilities
- other short-stay lodging facilities such as guest houses, farmhouses, youth hostels, mountain refuges (shelters), etc.

Excludes:

- rental of long-stay accommodation, see 70.20 provision of short-stay lodging

### 3.1.4 SICTA

The World Tourism Organization (WTO) developed a Standard International Classification of Tourism Activities (SICTA) which conforms to the third revision of the International Standard Industrial Classification of all Economic Activities (ISIC) and parallels its structure throughout. The Tabulation fields are reported in the following description:

Field 1 Division - ISIC tabulation category and division

Field 2 Group - ISIC Group

Field 3 Class - ISIC Class

Field 4 Subclass - SICTA-defined class category

Field 5 T/P - SICTA tourism designation "T" for subclasses dedicated to tourism; "P" for part involvement in tourism

Field 6 Name - name of category

1	2	3	4	5	6
Division	Group	Class Main-sub		P/T	Name
		5510-4		T	CAMP SITES, INCLUDING CARAVAN SITES

### 3.1.5 TSP - Tourism-specific products

<sup>9</sup> Nace Rev.1 pages 139-140.

The main objective of the TSP is to make international comparability possible in the economic analysis of tourism. Additionally, it should be used as a reference for those countries wishing to develop their own list of tourism specific products. As it aims at universal use, it might happen that in a given country, or in particular circumstances, some products considered as specific to this situation are not included in the list, or on the contrary, that some products considered in the TSP are not specific in that particular case. All countries, following the criteria that have been established, will determine which products of the list are connected to which characteristic of tourism, according to the local reality. The TSP was derived from the U.N. Central Product Classification (CPC) Version 1.0, but was expanded where required for the analysis of tourism.

In coding the various items, six-digit codes, with a point between the fifth and sixth digit were used. The first five digits correspond to the CPC code (Version 1.0) and the sixth digit is used exclusively for the TSP list. If the sixth digit is a zero, it means that this item is the same as the one presented in CPC Version 1.0 and has been drawn from it, but if the sixth digit is not a zero, the item corresponds only partly to the CPC Ver. 1.0 code

Camp site code is

**63195.0** Camping and caravanning site services

### 3.1.6 COMMISSION DECISION 9/12/98 on the procedures for implementing Council Directive 95/57/EC

**Commission Decision 15/1/99<sup>10</sup>** on the procedures for Implementing Council Directive 95/57/EC is specific on tourism and gives a bit more information on structure classification and services (in this report it will be referred to as the Commission Decision).

Tourist camp-site's definition is: "...collective facilities in enclosed areas for tents, caravans, trailers and mobile homes. All come under common management and provide some tourist services (shop, information, recreational activities). (Equal to NACE group 55.22, camp sites, including caravan sites. Equal to CPA group 55.22.10). Camp sites let pitches for tents, caravans, mobile homes and similar shelter to overnight visitors who want to stay on a 'touring' pitch for one night, a few days or week(s), as well as to people who want to hire a 'fixed' pitch for a season or a year. Hired fixed pitches for long-term rent (more than a year) may be considered as private accommodation."

<sup>10</sup> Official Journal L009, 15/1/1999 p.0023-0047.



**Table 3.1 - Fundamental Services supplied by tourist accommodation structures according to their definition by the Commission Decision**

Accommodation type	Structure	SERVICES				
		room service	daily bed-making	cleaning of sanitary facilities	Cleaning room/area for sleeping	Other services
<b>COLLECTIVE ESTABLISHMENTS</b>						
<b>HOTELS</b>	arranged in rooms	*	*	*	*	*
Hotels		*	*	*	*	* e.g.TV
Motels		*	*	*	*	*
apt. Hotels		*	*	*	*	*
roadside inns		*	*	*	*	*
beach hotels		*	*	*	*	*
residential clubs		*	*	*	*	*
<b>SIMILAR ESTABLISHMENTS</b>	arranged in rooms					
boarding houses		*	*	*	*	
tourist residence		*	*	*	*	
B&B		*	*	*	*	
Farmhouse		*	*	*	*	
<b>OTHER COLLECTIVE ACCOMMODATION</b>	arranged in dwellings					
Holiday houses						
Camp sites	enclosed areas with facilities to shelter			*	*	info, shop, recreation
Marinas				some sanitary facilities		
Youth hostels				*	*	
group accommodation for employees or students				*	*	
mountain refuges				*	*	
<b>SPECIAL ESTAB.</b>						
Health establishments.		*	*	*		*
Work and holiday camps						
Public means of transport			*	*		
Conference centres	if the centre provides hotel services, it should be considered a hotel.			*		special facilities
<b>PRIVATE ESTABLISHMENT</b>						
Rented rooms in family houses						
Dwellings rented from private individuals or professional agencies	complete units					
Secondary houses (incl. time-sharing)						

Source: elaboration ACTA on Commission Decision

The product group “tourist accommodation” has been defined according to the Commission Decision 99/35/EC implementing the Council Directive 95/57/EC on the collection of statistical data in tourism. The Commission Decision defines tourist accommodation as “*any facility that regularly or occasionally provides overnight accommodation for tourists*”. The Commission Decision defines the different types of tourist accommodations and identifies some services which they provide. From an analysis of the document it is clear that tourist accommodation implies the consideration of two elements: structure and service.

Structure, as can be inferred from the Commission Decision, stands for the disposition of the space and the facilities given to the guest. Structure determines the type of accommodation (hotels, youth hostels, B&B, farmhouses, camp sites...).

The structure alone, however, does not make the “tourist accommodation”. Always from the analysis of the Commission Decision, it can be said that accommodation implies the supply of services.

Services represent the opportunities offered to the guest. They are the activities which give life to the structures.

The EC Regulation 1980/2000 is addressed to services which have a life cycle that consists in three phases: “purchase of the goods necessary to provide the service”, “provision and use of the service” and “management of waste”. The services offered by tourist accommodation structures are varied and each type of service has its environmental impacts. Deciding which services to include in the product group means to decide the sources of the environmental impacts that will be considered.

Results coming from the discussions of the previous study on European eco label for tourist accommodation were that:

- it is necessary to consider both approaches in the product group definition as the core of tourist accommodation lies in the union of the two aspects (structure and service). Therefore the product group definition should be based on the integration of the two approaches;
- the lodging, as product group, is a service which is connected to the structure of accommodation;
- the definition of lodging is “*the provision of sheltered overnight stay structured in rooms, with all their contents, including at least a bed fit for use, offered as main service to tourists behind a fee*”;
- the types of tourist accommodation which would be included in the product group by considering the provision of lodging as the fulcrum of tourist accommodation are: collective accommodation and private accommodation. Camp sites with bungalows are a part of collective accommodation.

This research had the intent of identifying the elements required as essential to camp sites by national legislation and quality standard schemes, to verify whether they were part of “lodging”, as we had defined it, and to establish the system of boundaries which distinguish this sub-product from the tourist accommodation product group at large.



## 3.2 Analysis of Legislation for European Camp sites

The aim of the analysis of the legislation framework in the camp site system was to understand the distinctive characters of national legislations and the shared characteristics of the quality standard schemes regulating the services and facilities which must be provided in Europe by camp sites.

At this stage the analysis is only limited to five European countries: Spain, France, Italy, Portugal and Germany.

For each nation the following elements were investigated and analysed:

1. the nature of camp site regulation
2. camp site definition
3. camp site zoning
4. other installations such as mobile homes and bungalows
5. minimum mandatory requirements
6. camping classification schemes and relative competent body
7. principal services emphasized

This research had the intent of identifying the elements required as essential to accommodation by national legislations and quality standard schemes, to verify whether they were part of “lodging”, and to establish the coherence between the possible product group definition and national regulation of classification and quality schemes.

The analysis of classification regulations also enabled us to acquire knowledge on elements present in camp sites even if not promoted. This is important in order to identify with greatest thoroughness all the elements which are part of the product group in order to define its system’s boundaries.

In this first analysis the lodging type differentiating camp site from other accommodation structures and particularly from hotels results from the enumeration of the elements present in the regulations of the different countries.

### 3.2.1 Nature of camp site regulation

In **Italy** regions are in charge of camp site regulations according to what established by the Cabinet decree of 13 September 2002, acknowledging the new frame law on tourism 135/2001. Here the attention is focused on the legislation of Region Tuscany, which, as emerged from the demand/offer analysis, is the Italian region with the highest number of camp sites. .

Also in **Spain** the discipline and classification of camp site is in charge of the Regions, the 1966 “*Orden por la que se aprueba la ordenación turística de los Campamentos de Turismo*” defines the area of application of the law, the minimum mandatory requirements for carrying out camp site activities and the classification criteria. This act being quite old, it may be deemed that the requirements it establishes may be largely overcome from the various communities. This is the reason why this is followed by a in deep study of the legislation of Cataluna, which is the Spanish region with the largest number of bed places and accommodation structures; in particular the attention is



focused on the tourism law 13/2002, de 21 de junio, de turismo de Cataluña; 55/1982, de 4 de febrer, sobre ordenació de la pràctica del càmping and l'Ordre d'11 de juliol de 1986, per la qual s'estableixen els requisits per a la instal·lació i el funcionament dels càmpings.

In **France** camp sites are regulated by a state law. In particular definitions and conditions for carrying out the accommodation activity are established by the 4 Mars 1991 “*Décret relatif aux conditions d'exploitation des terrains de camping-caravaning*”, while the relevant classification is established by the “*Arrete du 11 Janvier 1993 relatif au classement des terrains aménagés pour l'accueil des campeurs et des caravanes*”.

In **Portugal** the *Lei n.º 167/97 de 4 de Julho* dictates that the requirements for the establishment, the functioning and the classification of the accommodation structures are regulated by relevant decrees. The classification of the *parques de campismo publicos* is regulated by the *Decreto Regulamentar n.º 33/97, de 17 de Setembro*.

In **Luxembourg** camp sites are regulated by a state law. The *Loi 11 juillet 1957* defines what *terrain de camping publique* actually means – *Loi portant réglementation du camping 25 mars 1967* and the *Règlement grand-ducal abrogeant et remplaçant l'arrêté grand-ducal du 29 juillet 1957 concernant le classement et les conditions d'installation des terrains de camping* are the two reference laws defining and classifying camp site.

In **Germany** there is no regulatory legislation for camp site, but the classification pattern of these accommodation structures is regulated by the *Deutsches Tourismusverband* for camp site which establishes the mandatory criteria for their classification.

In **UK** camp sites are regulated by the Caravan Sites and Control of Development Act 1960 and where applicable by the Public Health Act 1936, but since these regulations have not been made available to us so far, our analysis is limited to the classification system named British Graded Holiday Parks Scheme (2000).

### 3.2.2 Camp site definition

The Commission Decision of 9 December 1998 on the procedures for implementing Council Directive 95/57/EC on the collection of statistical information in the field of tourism defines tourist camp-sites as “*collective facilities in enclosed areas for tents, caravans, trailers and mobile homes. All come under common management and provide some tourist services (shop, information, recreational activities)*”<sup>11</sup>. *Camp sites let pitches for tents, caravans, mobile homes and similar shelter to overnight visitors who want to stay on a 'touring' pitch for one night, a few days or week(s), as well as to people who want to hire a 'fixed' pitch for a season or a year. Hired fixed pitches for long-term rent (more than a year) may be considered as private accommodation*”.

The following table shows the relationship between the definition provided by the European Directive and the ones of the countries under scrutiny. In particular the respective definitions are de-structured into the following headings:

- area of implementation

<sup>11</sup> Equal to NACE group 55.22, camp sites, including caravan sites. Equal to CPA group 55.22.10.



- type of management
- accommodation type
- services
- goals
- final user
- length of stay
- minimum capacity of the camp site

These headings were decided in order to classify the information according to the elements required by Regulation 1980/2000 for the EU Eco-label criteria for product group definition and criteria development:

- market characteristics,
- main elements according to a life-cycle approach,
- areas /activities of influence of the criteria.

From the definitions resulting from national legislations the outcome is that a camp site is an enclosed area aimed to allow for a fee the stay in the open air of tourists, who generally provide for their own means of lodging or who lodge by means provided by the camp site for a limited time span. (occasional or less than a year). The lodging means, are tents, caravans, mobile homes and other non permanent means. It is evident that these are all **mobile** structures. For this reason they are often not called structures. With the exception of the Italian Region Tuscany, the definition of camp site does not mention the facilities offered.

In particular:

- in Tuscan legislation the definition of camp site mirrors the European one, in that it states that it must be a unitary of areas destined mainly to the short or long stay of tourist, normally equipped with own mobile lodging means;
- in the Portuguese definition they mention the possibility to arrange areas aimed at possible permanent structures in the terms defined by the relevant regulation;
- the French legislation on camp site excludes the application of this term from structures used as permanent homes: the camping-caravanning must only be used as a temporary dwelling means. Therefore they distinguish between “terrain de camping de tourisme” for a short stay (not longer than 1 month) and “terrain de camping de loisir” for stays longer than a month but in any case for non for permanent homes;
- Spanish law stresses the temporality of the lodging and the mobility of the dwelling means. The Catalan law of 2002 defines a camp site as a public-use area for open air shared living through mobile lodgings or bungalows.



Table 3.1 - Camp Site definition in European legislation

Nation	Region	Law	Implementation area	Unified management	Lodging							Aim				
					Accommodation				Facilities			Short stay	Tourism	Shared living in the open air	Longer stay	
					Tents	Caravan/Trailers	Mobile Home	Other	Information	Recreation	Shop					
<b>EU</b>		<b>Commission Decision of 9 December 1998</b>	<b>camp-sites</b>	x	x	x	x	x	x	x	x				x	
<b>Italy</b>	<b>Tuscany</b>	Regional law 23rd march 2000, n. 42	camping	x	x	x	x				x	x			x	
<b>Spain</b>		Orden 28 de junio de 1966	camping		x	x	x	x					x	x		
<b>Spain</b>	<b>Cataluna</b>	Decret 55/1982, de 4 de febrer	camping		x	x	x								x	
<b>France</b>		Décret 4 mars 1991	camping caravanning		x	x	x	x								x
<b>France</b>		Décret 4 mars 1992	terrains de camping/caravanning													
<b>Portugal</b>		Decreto-Lei n.º 588/70 de 27 de Novembro	parques de campismo publico		x	x		x								
<b>Luxembourg</b>		Règlement grand ducal 25 mars 1967	terrains de camping publico													



Nation	Region	Law	Delimitation		Users			Length of stay			Minimum capacity		Minimum requirements
			enclosed	Equipped tourists	customary	occasional	max 1 year	>3mezzi	>10 persons				
<b>EU</b>		<b>Commission Decision of 9 December 1998</b>											
<b>Italy</b>	<b>Toscana</b>	Regional law 23 <sup>rd</sup> March 2000, n. 42	x	x								x	
<b>Spain</b>		Orden 28 de junio de 1966	x					x			x		
<b>Spain</b>	<b>Cataluna</b>	Decret 55/1982, de 4 de febrer	x									x	
<b>France</b>		Décret 4 mars 1991											
<b>France</b>		Décret 4 mars 1992			x	x			x		x		
<b>Portugal</b>		Decreto-Lei n.º 588/70 de 27 de Novembro	x									x	
<b>Luxembourg</b>		Règlement grand ducal 25 mars 1967	x				x						

Source: Elaboration ACTA

### 3.2.3 Camp site zoning

The Tuscan law defines that the minimum percentage of ground to be destined to facilities and free areas for common use must be equal to 10% of the overall structure ground, excluding the surfaces destined to in-site mobility.

The Portuguese law defines a maximum area that can be destined to complementary installations, equal to 25%.

The Spanish law specifies that no more than 70% of the overall camp site surface may be dedicated to the “zona de acampada”: the 30% is divided between in-site alleys; green areas; sporting areas and other services of common use. The minimum capacity is determined as a function of an average figure between people per pitch or in connection with the overall camp site’s surface.

### 3.2.4 Other installation such as mobile homes and bungalows

In Tuscany they prescribe that no more than 25% of the pitches may be destined to the installation of temporary structures anchored to the ground; these structures must be developed by the owner/manager and let to guests that do not have own lodging means. This quota may increase till 35% in camp sites with a number of pitches not larger than 150.

In Portugal permanent installations can exist provided they are complementary and, as in Tuscany, they must not be more than 25% of the overall area destined to camping people.

In France the installation of permanent structures such as bungalows, chalets and the like is allowed provided they are incremental and remain in the camp site’s ownership. .

The Spanish law dictates that the installation of permanent structures may be authorized up to 8% of the total ground for the so called mobile-homes, according to the capacity and the situation of the camp site. The Catalan law allows the installation of permanent structures such as bungalows or mobile homes, provided that the surface they take does not overcome 30% of the surface dedicated to the pitches.

### 3.2.5 Minimum mandatory requirements

Some legislations establish some minimum requirements for all structures, independent of the number of stars, such as the Catalan, Tuscan, Luxembourg and Portuguese laws. Also the UK classification system includes a range of minimum requirements.

These regulations divide their elements in very much the same way as we have done for the first identification of the lodging services, in the following categories:

- structure
- reception/administration
- common services
- common equipment



The elements present in these categories were reported and counted in order to obtain an index number of presence. In general, it is sufficient to know that the results of this analysis can bring to a first broad identification of the elements constituting the system boundaries.

These categories are implied by the structure of the legislations themselves, and they are apt to describe the camp site following the same categories as other types of lodging facilities.

The outcome is reported below and applies to all or at least two of the countries under scrutiny.

**for the structure**

- the camp site is divided in pitches for shorter or longer stay; pitches are enclosed and signaled
- the ground must be properly arranged in order to facilitate the drainage of rain water and the easy flow of cars
- the accommodation structure must be easily accessible to cars and trailers
- guarantee of a special first aid room

**for the reception/administration**

- a watch service is guaranteed 24 hours a day
- a separate reception building is provided

**for the common service**

- sanitary services must include at least W.C., sink, shower; gents facilities are separate from ladies'
- a minimum water flow per day must be guaranteed non to be inferior to x liters per guest
- treatment of drinking water
- drinking water must be provided also through fountains, with a rate of at least one per 100 guests
- the floor of the sanitary buildings and the like must be tiled and such as to allow easy cleaning
- in WCs the flush of residual waters must be guaranteed
- in WC areas a proper ventilation and lighting must be guaranteed
- common areas must be illuminated also at night
- garbage must be collected and eliminated
- every x meters there must be containers for collecting garbage
- daily cleaning of common areas

**for the common equipment**

- snack bar guaranteed
- telephone facilities

**Table 3.2 - Minimum mandatory requirements in the official regulation**

	CATALUNA	TUSCANY	PORTUGAL	UK	LUXEMBOURG	tot	%
<b>Structure</b>							
accessibility	1	1	1		1	4	80
Streets and paths	1	1	1			3	60
Car park in pitches	1	1	1			3	60
Pitches	1	1	1			3	60
car park area	1	1				2	40
Ground		1	1			2	40



Pitch enclosure	1	1	1			3	60
Localization	1		1			2	40
Fire prevention system	1			1		2	40
Signs	1	1				2	40
First aid	1	1	1	1		4	80
Covered surface		1				1	20
<b>Reception</b>							
Bureau		1	1	1		3	60
Security services		1	1			2	40
<b>Common service</b>							
Drinking water through fountains	1	1	1			3	60
Treatment of drinking water e	1	1	1		1	4	80
Treatment and elimination of residual waters	1	1	1	1	1	5	100
Electric installations	1	1	1			3	60
Illumination of common spaces	1	1	1	1		4	80
Sanitary services (WC, sinks,	1	1	1	1		4	80
Sanitary services for children			1			1	20
Sanitary services for disabled			1			1	20
Natural or artificial Illumination and ventilation of WC	1	1	1	1		4	80
Minimum daily water flow	1	1	1	1	1	5	100
Material of walls, covertures and floors	1	1	1			3	60
Dish wash sinks		1	1			2	40
Linen wash tubs		1	1			2	40
Mirror, hooks			1			1	20
Ironing table			1			1	20
Electricity sockets in WCs			1			1	20
Containers for solid waste	1	1	1	1		4	80
Collection and elimination of garbage	1	1	1	1	1	5	100
Daily clean up of common areas		1	1	1	1	4	80
Heating plant		1		1		2	40
Water sewage system for caravans		1	1			2	40
Electric plants for caravans and mobile		1	1	1		3	60



<b>Common equipment</b>							
Telephone facility		1	1	1		3	60
Playground			1			1	20
Sport areas			1			1	20
Snack bar / grocery	1	1		1		3	60
Restaurant	1					1	20
Longer stay equipments		1	1			2	40

Source: Elaboration ACTA

### 3.2.6 Camping classification and relative competent body

In Tuscany, France, Spain and Portugal the classification of camp site is mandatory.

In Tuscany camp site' classification ranges from 1 to 4 star; it is approved by the Province upon request by the Commune.

In Portugal camp site are divided in public, private and rural . Relevant classification is approved by a government body responsible for Direcção-Geral del Turismo (DGT) and is mandatory. It ranges from 1 to 4 stars. The in deep study of the public camp site follows.

The large majority of French camp site is included in a system of categorization with stars. ( \*, \*\*, \*\*\*, \*\*\*\*) . The classification of a camp site into a given category is by prefectoral order according to the opinion of the departmental commission for the tourism action (CDAT). This commission is made up of representatives of administrations, members of the unions belonging to open-air hotel industry and the representatives of the camp site users by means of the French Federation of Camping Caravanning. In France the classification of the "*terrain de campings*" is divided into:

- *terrain de camping* classified as "*tourisme*" intended for short stays (no longer than 1 month)
- *terrain de camping* classified as "*loisirs*" intended for stays for more than one month, but not residential;
- *terrain de camping* classified as "*aire naturelle*" when the use is limited to two months a year, its capacity is 120 pitches and its surface is 1 hectare and a half;
- *terrain de camping* classified as "*saisonnier*" when used up to six months a year, continued or discontinued, its capacity must not exceed 25 pitches nor 1 hectare surface.

The terrain de camping classified as tourisme are analyzed further on .

In Spain camping places are classified in categories from 1 to 4 (deluxe) star by the Consellería de Turismo.

In Luxembourg the *terrains de camping public* are classified by the Ministry in 4 classes according to a set of minimum norms of functioning and management. .

In Germany the German Association classifies camp site from 1 to 5 \*.

In Finland the classification is not mandatory. Finnish camp site are being reclassified and, so far, about 100 have been awarded a star category. A one-star camp site provides basic services and a five-star site the best possible services.

In Norway, the classification is made by the Reiselivsbedriftenes Landsforening - RBL (National Association of Category of Norwegian Tourism Enterprises). The stars are awarded from 1 to 5. in camp site and cabins: this means that a five star camp site could have a 1 star cabin, and vice versa.

In Denmark approved camp sites are classified by the Danish Camping Board and the quality is rated by means of 1, 2, 3, 4 or 5 stars, with 5 being the highest award, on the basis of the classification system. Standards are controlled at least once a year

In Holland the classification is developed by the Stichting Classificatie Kampeer, but it was not possible to analyse it as it is only available in Dutch

The British Graded Holiday Parks Scheme (BGHPS) is operated by the National Tourist Boards for England, Scotland, Wales and Northern Ireland, in association with the British Holiday and Home Parks Association (BH&HPA) and the National Caravan Council (NCC).

### 3.2.7 Similarities and differences among national classification systems

For the elaboration of the following table (Table 3.3) the same criteria have been followed as for table 4.2, where for the identification of the lodging service the elements included in the national schemes were classified in the following categories:

- structure
- reception/administration
- common services
- common equipment

Although the countries analyzed are ten, the schemes under deeper scrutiny are eleven, as besides the Spanish classification also the Catalan classification is included, for a more thorough analysis and also because, as already seen, Spanish legislation is quite dated and therefore it seems interesting to see the quality gap between the two.

The table also takes into account the minimum mandatory requirements that are the subject of the above analysis.

Conclusions anticipated in previous paragraph are confirmed also by the analysis of the classification schemes.

Therefore it results that for all classification schemes or for most of them (4 out of 5), independent from the stars:

#### **for the structure**

- the camp site is divided into pitches for shorter or longer stay; pitches have boundaries made of plants or artificial material and are signaled
- car parks is typically within the pitch area or in separate areas at the camp site's entrance
- the ground must be arranged in such a way as to facilitate the discharge of rain water, the easy flow of cars and to prevent raising of dust and mud
- existence of alleys with trees ensuring adequate shadow
- the accommodation structure must be easily accessible to cars and trailers

#### **for the reception/administration**

- security guaranteed 24 hours a day
- the reception is generally designed to be at the camp site's entrance in a specific structure, and it carries out booking, welcome, information, assistance, mail services.
- a specific first aid room is guaranteed



**for the common service**

- the materials for floors, sanitary services and the like must be tiled or of equivalent anti-slip material and such as to be easily cleaned
- sanitary services must include at least WC, sink, shower: Nets are separate from Ladies
- in general the WC area is separated from the shower area and Men's toilets from Ladies'
- a minimum water x liters water flow must be guaranteed
- in toilets and showers a sufficient natural light and artificial ventilation must be guaranteed
- soap dispensers, electric hand dryers or paper towels, mirrors, in general for classifications above 1\* and 2\*
- electric sockets for razors, air driers, milk baby's bottles...
- wash basins for linen and wash up sink for dishes
- drinking water must be guarantee in sinks and be available also through fountains for a quantity amounting to x liters per each person or meters.
- treatment of drinking water or depuration system
- for campers and mobile homes water sewage and electric connection
- treatment of residual waters discharge
- common areas must be illuminated also by night
- garbage must be collected and eliminated
- special garbage containers must be guaranteed, generally so much per person of per square meter
- at least daily cleaning of common spaces

**for the common equipment**

- small food shop inside or in the immediate neighborhood of the camp site
- snack bar
- leisure areas
- telephone boxes or portable phone or telephones in common areas



**Table 3.3 - The services reported by 5 European classifying schemes**

	Spain	Cataluna	Portugal	France	Italy	Germany	Norway	Finland	UK	Denmark	Luxembourg	Tot
<b>Structure</b>												
Minimum pitch surface (m2)	1	1	1	1	1	1		1			1	8
Car park area		mmr	1	1	1	1			1			6
Car park in pitch		mmr			mmr	1						3
Pitch enclosure	1	mmr	mmr	1	mmr	1	1	1	1		1	10
Accessibility		mmr	mmr	1	mmr	1	1		1		mmr	8
Ground arrangement			mmr	1	mmr	1	1		1			6
Free areas for common use		1			1			1	1			4
Garden areas			1	1	1							3
Natural/artificial shadow areas		1		1	1	1						4
Roofed area for common use					1							1
Accessibility for disabled				1		1	1		1			4
<b>Reception</b>												
Bureau	1	1	mmr	1	mmr	1		1	1			8
Safe deposit box	1	1	1		1							4
First aid	1	mmr	mmr	1	mmr		1					6
Permanent security service	1	1		1	mmr	1	1	1	1		1	9
Foreign languages spoken				1	1	1		1				4
Information material						1	1		1			3
Advice, tourist information						1	1	1	1			4
<b>Common service</b>												



	Spain	Cataluna	Portugal	France	Italy	Germany	Norway	Finland	UK	Denmark	Luxembourg	Tot
Cleaning of sanitary installations			mmr	1	1	1			mmr		mmr	6
Sinks	1	1	1	1	1	1			1			7
Garbage collection and elimination	1	mmr	mmr	1	mmr		1		1	1	mmr	9
Minimum water flow	1	mmr	mmr	1	mmr				1		mmr	7
Tiled floor		mmr	mmr	1	mmr	1			1		1	7
sanitary installations heat								1				
Tiled wall or equivalent		mmr	mmr	1	mmr	1			1			5
Shower	1	1	1	1	1	1	1	1	1	1		10
Shower with anti- sprinkle						1				1		2
Urinal				1		1					1	3
WC	1	1	1	1	1	1	1	1	1		1	10
Drinking water treatment / depuration	1	mmr	mmr	1	mmr				1		mmr	7
Drinking water fountains		1	mmr	1	mmr							4
WC and toilet accessories				1					1			2
Chemical disposal facilities									1			1
sink for dishes with draining	1	1	1		1	1			1		1	7
Tumble dryer or drying							1					1
Linen wash basin	1	1	1	1	1	1	1	1	1		1	10
Linen driers			1		1	1			1			4
Small cooking areas/ outdoor grill/barbecue			1		1	1	1	1	1			3
Washing/dishing machines						1	1	1	1			4
Electric iron facility			1						1			2
hair dryer/hand dryer					1		1	1	1			4
Treatment and elimination of residual water	1	mmr	mmr	1	mmr	1	1	1	1		mmr	10

	Spain	Cataluna	Portugal	France	Italy	Germany	Norway	Finland	UK	Denmark	Luxembourg	Tot
Lighting and natural or artificial ventilation in toilets		mmr	mmr		mmr	1			1			5
Lighting in common areas		mmr	mmr	1	mmr	1		1	1			7
Warm water	1	mmr	mmr	mmr	1	1			1		1	8
Electric sockets		1	1	1	mmr	1	1	1	1	1	1	8
Power, water, drainage and sewage connection for campers	1	mmr	mmr	1	mmr	1		1	1		1	9
Soap dispenser							1		1			2
Toilet paper						1			1			2
Accessories, mirror, shelf in bathroom		1	mmr	1	1	1			1			6
Towels						1			1			2
baby changing facilities									1			1
<b>Common equipment</b>												
Snack bar/kiosque	1	mmr	1		mmr	1	1	1	mmr			8
Adults and children swimming pool	1	1	1						1			4
Grocery/market	1	1	1		1		1		1			6
playground		1	mmr	1					1	1	1	6
Meeting room, lobby		1	1	1								3
Playground for children		1	mmr	1	1		1	1	1			7
Fax, e-mail		1			1	1	1					4
Small restaurant / restaurant/ self-service		1			1	1	1	1	1			6
Soft drinks service				1								1
Telephone	1	1	1	1	mmr	1	1	1				8
Hair dresser		1							1			2
Boutique		1										1
Tennis court		1										1

	Spain	Cataluna	Portugal	France	Italy	Germany	Norway	Finland	UK	Denmark	Luxembourg	Tot
Laundry and ironing facilities		1		1					1			3
Car rental facility		1										1
nursing room for babies							1	1				2
dining room								1		1		2
sauna								1				1
TV in common room					1			1		1		2
Betting shop									1			1
baby-sitter service								1				1
Club									1			1

Source: Elaboration ACTA

### 3.2.8 Principal emphasis on the classification schemes

French regulation dictates that in each category the pitches with water, electricity, and directly linked with a residual water depuration system be named “*grand confort caravane*”; instead the ones with water, electricity and connected with the network for gray water are called “*confort caravane*”. The number of sanitary equipments relevant for one or the other varies and is determined as a function of the sanitary arrangement of the receiving plants-

Besides, the French classification scheme is different from the others in that it describes in detailed and punctual way a number of technical norms for the accessibility for disabled persons; in particular they dictate a specific percentage of sinks, special WCs, showers.

The German scheme emphasizes the reception service, in particular assistance and advice are considered very important factors for the length of stay in the camp site, such as distribution of information material or information on events; the security service is also considered very important. In the sanitary area not only is the number of appliances important, but as important are architectural technical design, as well as the quality of floor and shower materials (the harmony between wall and floor tiles is a criterion for 5 stars).

In the Portuguese scheme amongst the mandatory prescriptions particular emphasis is placed on camp site’s location, which, amongst other, must be not too near to industrial areas nor to heavy traffic roads, nor in areas of river flow or strong water infiltration. Proper location is also dictated also for sanitary installations, which must not be adjacent to the areas where food is prepared or consumed.

The Catalan regulation is especially punctual in establishing the minimum requirements for a correct fire protection system and for a correct treatment/evacuation of residual waters as well as the collection and elimination of garbage.

The Tuscan classification scheme is characterized by a special attention for ground arrangements (car park, common use areas, garden areas); sport equipments and various leisure equipments, in particular playground for children, and food and beverage facilities (snack bar and the like) are elements considered rather relevant.

Classification in Finland particularly emphasizes the installation of equipments aimed at making the stay more comfortable (sauna, nursery room for babies, children’s playground, dining room...).

In Norway the classification scheme is characterized by a particular attention towards service: cleaning, maintenance, security and lighting.

Classification in Denmark is especially punctual in leisure equipment and kitchen facilities.

In UK a rating of 1-5 Stars is awarded following an assessment of the quality, cleanliness, maintenance and condition of the various facilities provided on the park. It is not necessary to provide a wide range of facilities in order to achieve a high grade, as the emphasis is on the quality of what is provided rather than a grading restricted by a lack of additional facilities. In this way a smaller, quieter park can achieve as high a rating as a large park with extensive facilities, as long as the quality of those facilities is of a high standard.



### 3.3 Product group definition

The product group “camp site”(service) is a sub-group of the product group “tourist accommodation”(service). The structure of a camp site is mainly “mobile”, in that the lodging structures offered are tents, caravans, mobile homes and other non permanent structures. Lodging in permanent structures, such as bungalows, may be provided as part of the service.

Then:

the product group “**camp site service**” shall comprise the provision, for a fee, within an enclosed area, composed of pitches equipped for the overnight stay, of mobile means of lodging structures, such as tents, caravans, mobile homes, or permanent structures as bungalows or rental caravans and collective areas for common service (such as washing facilities, supermarkets, information, cooking facilities, other facilities necessary for the provision of shelter), offered as main service to tourists, travellers and lodgers. The service offered within this area may include the provision of food services, leisure activities and/or green areas.

Thus, the above definition of product group for camp sites has to point out the following dimensions in which two concepts of lodging service can be identified: one specific for camp sites, and one common to all structures providing the lodging service.

The elements specific for camp sites can so far be identified in:

- the provision of pitches;
- the provision of collective areas for common service specifically linked to own mobile means of lodging structures, tents, caravans, etc.

The elements true of any lodging service are:

- being the main service of the accommodation;
- being provided behind a fee;
- being addressed to tourists.

#### Specific services

##### *Provision of pitches*

This concept is the main element which distinguishes camp sites from other accommodation structures. Pitches are open air spaces, enclosed and identified, designed for the stay of tourists (ranging from one night to one year) for a fee. The stay is made possible through mobile means, owned by the tourist or let by the conductor of the camp site for the length of the stay, this being the identifying element of the “lodging” service in the camp site. Letting pitches for a fee constitutes the main income for the internal market from tourist overnight stays and thus this provision complies with art. 2.2.a of Regulation 1980/2000.

*Provision of collective areas for common service*

The main services offered by camp sites other than sleeping are used by campers within the collective areas.. It is in the provision of collective services that lies most environmental impacts. Therefore, taking into consideration this dimension complies with art. 1 Reg. 1980/2000. The services offered by camp sites are varied and each type of service has its environmental impacts.

**Basic lodging services***Application of a fee for the service*

There are instances where lodging is provided in open air areas where there is no unitary management and where no fee is charged: these are generally so called short stay areas, with no enclosure and permanent watch service of the overall area. Those cases should not be included in the product group definition in that they do not fulfill the requirement of representing “a significant volume of sales and trade in the internal market” as required by Reg. 1980/2000 art. 2.2.a. In addition these situations are not included in the camp site definition.

*Lodging be addressed to tourists*

The tourist is a visitor who stays at least one night in a collective or private accommodation of the place/country visited. This place is other than his/her usual environment, the stay does not last more than 12 months and the main purpose of the visit is not the exercise of an activity remunerated from within the place visited.

It is important to define the system boundaries of the lodging services, in other words, which other services constitute the lodging service.

The most relevant incremental services related to the provision of collective areas will be taken into account even if the provision of pitch is relevant. It is important to point out that the exclusion of food services (restaurant services) and recreational services from tourist accommodation is due to the fact that these services are not the main purpose of the product group. Furthermore in consideration of the fact that they can be provided outside the tourist accommodation also from other specific tourist facilities (restaurants, sport center, etc.), camp sites being a sub-product of tourist accommodation, their food and beverage facilities should not be taken into account, although it is important to evaluate the relevance of food facilities since the existence of a small food shop is one of the minimum mandatory requirements, as seen in the legislation analysis.

Thus the most relevant services are:

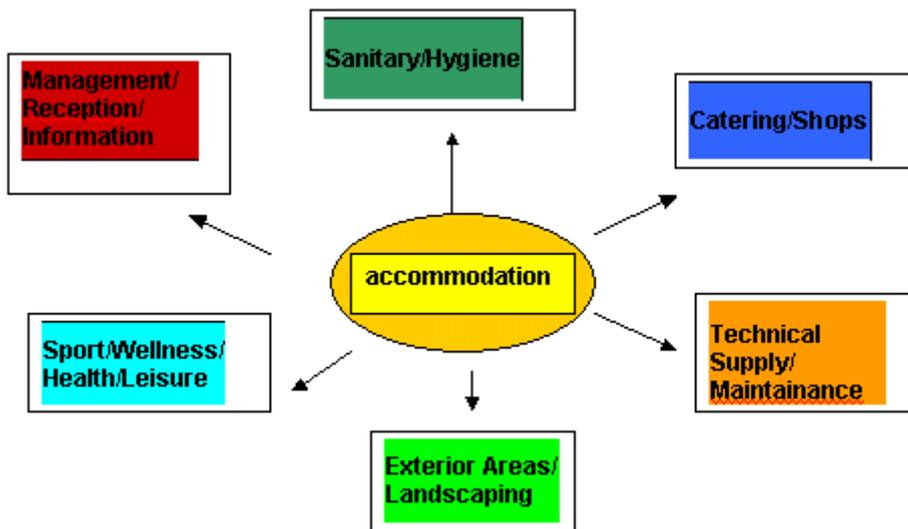
- **common service**
- **stay** with the purpose of sleeping and the exclusive use of terrain marked and prepared for the visitor’s necessities (power, waste water discharge, garbage collection)
- activities related to **reception** and **information**
- **cleaning of all facilities** and common spaces.

A further division into sectors of the different service areas has been attempted, resulting from a preliminary screening of :

- the service required by legislation and/or classification schemes of the different countries
- the service offer as presented in catalogues and publications of the European camp site associations/organisations

resulting in the definition of 7 service areas:

**Graph 3.1 - Camping Site service areas**



## 4 Preliminary approach to criteria development

### 4.1 First results on impact areas

Moving from the already defined assumption that camp site service constitutes a sub-group of tourist accommodation service, and from the necessity to integrate the often side by side existing accommodation (lodging) service with the traditional camp site service, the suggestion is that of adapting and integrating the existing criteria for the tourist accommodation Eco-label in such a way as to be applicable for both product groups.

Hereby the following elements will have to be considered:

- ⇒ (As shortly pointed out under “environmental impact”) the characteristic of individual lodging, cooking, cleaning and other activities carried out by campers, while determining a superior environmental impact on several levels compared to the same activities provided by one supplier (restaurant, housekeeping department) for the same number of guests, is also less subject to possible control/limitation by the manager/owner of the camp site. All the obligatory criteria regarding the “sleeping” sector from the tourist accommodation label will therefore be obligatory also for the camp sites who offer this service, while they will be at most facultative, if at all applicable, for the traditional camp site offer.
- ⇒ For the same reasons, it is foreseeable that the environmental area where major impact occurs, and therefore the most restrictive/proactive action will have to be enforced, is that of “waste”. In order to compensate the fact that on the origin/purchase and use of many products that enter the camp site the management has no influence, since it is directly operated by the guests, at the very least its correct disposal has to be strongly regulated. Much emphasis of the obligatory criteria will therefore be put on waste collection and disposal and waste water control and depuration.

Currently, the preparation of two further media for the gathering and analysis of useful data regarding to this matter is under way, specifically a questionnaire on the existence, enforcement and reception (by guests and staff) of environmental management systems and criteria in camp sites, which will be administered to a statistically representative number of European camp sites, and a matrix for the collection and comparison of all criteria of existing environmental hallmarks in Europe, and their influence on the environmental impact of camp site services.

As a working instrument, the following (temporary) list of camp site services has been created. It bases itself on a preliminary screening of the services emerging from catalogues and regulation systems, present in at least 80% of the available documentation, and the selection of those who were mentioned in at least one of the 7 European eco-labels for camp sites (Austrian Eco-label, Latvia, Luxembourg, La Clef Verte, Noegle, Cataluna, Milieubarometer, VIABONO) on criteria level, being supposed to have a significant environmental impact, and therefore possible object of criteria definition.



Table 4.1 - Camping Site service sectors

Management/ Reception/ Information	Accommodation	Sanitary/ Hygiene	Catering/ Shops	Sport/ Wellness/ Health/ Leisure	Exterior Areas/ Landscaping	Technical Supply/ Maintainance
supply of printed information/ documentation phone/mail/fax service provision of directions for arrival/excursions	accommodation for hire sleeping equipment for hire caravan pitch tent pitch mobile home pitch car parking inside car parking outside	wash basin- cold water wash basin- hot water shower-cold water shower-hot water washing up- cold water washing up- hot water washing machine dryer/tumbler heated drying room electric shave points electric point for hairdryers ironing facilities slop sink chemical toilet disposal point lighting of sanitary sector heating of sanitary sector cleaning of sanitary sector	restaurant food shop take away food club house with bar kiosque/bar Licensed to sell alcoholic drink cooking facilities electric cooking microwave ice available outdoor barbecue fish cleaning facilities	swimming pool heated swimming pool bathing beach or lake water slide windsurfing diving facilities motor boat hire sailing/rowing/canoing tennis court raquet sports private shooting range solarium spa/bath jacuzzi sauna gym exercise track riding/pony trekking cycle hire angling mini golf golf animation evening entertainment excursions by bus excursions by motor boat excursions (cycle/horse/walking) zoo	divided into sections grassy areas shaded areas asphalt areas gravel areas flower beds fruit trees children playground area for ball games	calor gas/camping gas for sale tv for hire radio for hire cable tv/ satellite tv connection on the pitch water connection on the pitch waste water outlet on the pitch facilities for empty moto caravan tanks electric point for tents electric point for caravans motor home service point car wash area



## 4.2 First proposal on criteria structure

The working hypothesis is that criteria structure will be coherent with the structure of the tourist accommodation criteria specified in the Commission Decision 2003/287/EC. In detail, this means criteria developed following the requirements of flexibility, easy applicability and environmental efficiency.

As for the tourist accommodation service criteria, there will be mandatory and optional criteria with the possibility to score points in case of compliancy.

### 4.2.1 Working list towards criteria formulation

At this point, the ongoing data collection and the experience derived from other camp site related projects (in particular ECOCAMPING) has lead to the composition of a short “working-list” of issues to consider for the formulation of mandatory criteria, which figures below, following the structure of the tourist accommodation service label, as a basis for further discussion, elaboration and completion.

#### **Energy**

Mandatory criteria as from Commission Decision for Tourist Accommodation Service, where applicable to common areas. Whole criteria list in case of presence of bungalows/fixed structures.

Particular emphasis on energy efficient light bulbs in public areas, timing devices, infrared barriers

#### **Water**

Except paragraph on towel change, mandatory criteria as from Commission Decision for Tourist Accommodation Service

Particular emphasis on aerators/flow restrictors/timing devices on faucets, toilets and showers

Further:

Use/sale of detergents for sanitary sectors/kitchen/common areas with eco label standard and staff training on use

Information for guests also on: water hardness (better dosage of detergents), water saving measures when washing dishes/laundry

Use of rain/lake/waste water for maintenance of green areas

Regulation for swimming pools (cover at night, low use of chemicals)

#### **Chemicals (Detergents and disinfectants)**

Mandatory criteria as from Commission Decision for Tourist Accommodation Service

Further:

Avoidance of: salt for icy roads, plant protection chemicals, mineral fertilizers

Use of methods of biological agriculture against insects and weed

Use of eco-labeled or non-noxious products for maintenance of green areas



**Waste**

Mandatory criteria as from Commission Decision for Tourist Accommodation Service

Further:

Use of recycled and recyclable material in office, sanitary and common areas (paper, plastic)

Avoidance of disposable/throwaway products and portion packaging in restaurant and shops

Separate waste collection containers in all areas, not more “general “ waste bins than separate ones

Own composting if no collection of organic waste available

**Other Services/General Management**

Mandatory criteria as from Commission Decision for Tourist Accommodation Service

Further:

**(Air)**

Limitation of car circulation inside the site (hours, areas)

Preference to local products for use (catering) and sale (shops)

**(Soil)**

Unsealed parking areas/camping pitches

Prevention of oil spillage from guest cooking

Severe control of underground gas/oil storage

**(Noise)**

Time and area limits for animation/leisure activities with potential noise output

Limitation to motor traffic (cars, motorcycles, ships)

**(External impact/Landscape/Biodiversity)**

Integration of the outdoor premises in the landscape related to design and construction

Use of local flora and fauna and respect of biological diversity

Natural (and environmentally-friendly) maintenance of the landscape

**(Communication)**

Animation with elements on sustainability

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