

## 2.1. COLLECTIVE TOURIST ACCOMMODATION ESTABLISHMENTS AND THEIR OCCUPANCY

### 2.1.1. Tourism in Małopolska and in the country

Małopolskie voivodship as of 1 January 2008 covered the area of 15183 km<sup>2</sup>, that was 4.9% of the country area. At the end of 2008 the area of Małopolska was inhabited by population of 3.3 mln, which constituted 8.6% of population in Poland. Average population density was 216 persons per km<sup>2</sup> (122 persons per km<sup>2</sup> in the country).

Due to landscape and recreational values as well as rich cultural heritage, Małopolska is one of the most attractive tourist areas of Poland.

According to the number of collective tourist accommodation establishments — as of 31 VII 2008 — the Małopolskie voivodship occupied the 1<sup>st</sup> place in Poland (12.7% of facilities in the country), before the Zachodniopomorskie voivodship (12.3%) and the Pomorskie voivodship (12.0%). These voivodships had the highest shares of bed places in tourist accommodation facilities of the country and as of the end of July 2008 they surpasses the Małopolskie voivodship respectively by 6.6 and 2.8 percentage points, placing it at 3<sup>rd</sup> position.

Hotel facilities in Małopolska accounted for 4.6% of collective tourist accommodation establishments in Poland, what gave the 1<sup>st</sup> position among other voivodships before the Dolnośląskie (4.4%) and the Wielkopolskie (3.9%). For the group of other facilities this share amounted to 8.1%, what placed the Małopolskie voivodship on the 3<sup>rd</sup> position after the Zachodniopomorskie (9.7%) and the Pomorskie (8.8%).

TABLE I. COLLECTIVE TOURIST ACCOMMODATION ESTABLISHMENTS IN THE MAŁOPOLSKIE VOIVODSHIP AND IN THE COUNTRY  
As of 31 VII

| TYPE OF FACILITIES                                     | Facilities   |             | Nights spent (overnight stays) |             |
|--|--------------|-------------|--------------------------------|-------------|
|  | 2007         | 2008        | 2007                           | 2008        |
|  | Poland = 100 |             |                                |             |
| <b>TOTAL</b> .....                                     | <b>12.5</b>  | <b>12.7</b> | <b>11.0</b>                    | <b>11.5</b> |
| <b>Hotel facilities</b> .....                          | <b>11.7</b>  | <b>11.9</b> | <b>13.5</b>                    | <b>13.7</b> |
| Hotels .....   | 13.1         | 13.7        | 14.5                           | 14.8        |
| Motels .....   | 10.2         | 8.5         | 10.7                           | 8.9         |
| Boarding houses .....                                  | 24.0         | 25.6        | 27.7                           | 32.3        |
| Other hotel facilities .....                           | 4.9          | 4.6         | 5.5                            | 5.0         |
| <b>Other facilities</b> .....                          | <b>13.0</b>  | <b>13.2</b> | <b>9.8</b>                     | <b>10.3</b> |
| Excursion hostels .....                                | 19.7         | 16.7        | 16.9                           | 15.3        |
| Shelters .....   | 42.6         | 40.7        | 44.7                           | 43.0        |
| Youth hostels .....                                    | 10.2         | 15.0        | 14.9                           | 17.6        |
| School youth hostels .....                             | 11.4         | 11.0        | 11.9                           | 11.8        |
| Holiday centres .....                                  | 10.2         | 10.0        | 6.9                            | 6.9         |
| Holiday youth centres .....                            | 8.2          | 8.2         | 3.2                            | 3.1         |
| Training-recreational centres .....                    | 13.7         | 14.1        | 11.1                           | 11.1        |
| Creative arts centres .....                            | 29.5         | 31.7        | 20.6                           | 22.4        |
| Public tourist cottages .....                          | 4.5          | 4.5         | 4.0                            | 4.0         |
| Camping sites .....                                    | 10.2         | 10.4        | 6.4                            | 7.2         |
| Tent camp sites .....                                  | 5.4          | 5.2         | 3.5                            | 3.3         |
| Weekend and holiday accommodation establishments ..... | 14.0         | 14.3        | 24.8                           | 23.5        |
| Health establishments .....                            | 23.7         | 22.6        | 17.1                           | 15.4        |
| Other non-classified facilities .....                  | 18.1         | 19.6        | 16.9                           | 20.6        |

Among all tourists accommodated in 2008 in collective tourist accommodation establishments in Poland — 8.8% spent a night in hotel facilities of the Małopolskie voivodship. A number of nights spent by them accounted for 6.8% of overnight stays in the country. Bigger shares were recorded only in the Mazowieckie voivodship (12.2% and 7.3%).

5.0% of tourists accommodated in the country stayed in other collective tourist accommodation establishments in Małopolska. In this respect the Zachodniopomorskie voivodship excelled with the index higher only by 0.1 percentage point.

In 2008 the most foreign tourist coming to Poland (20.5%) spent nights in tourist facilities in Małopolska. A little less (20.0%) spent nights in facilities situated on the area of the Mazowieckie voivodship. The Małopolskie hotel facilities received 17.7% of foreign tourists staying in Poland and the number of overnight stays accounted for 16.7% of the country average (in the Mazowieckie voivodship respectively — 19.7%, 14.5%).

In other collective tourist accommodation establishments in the Małopolskie voivodship in 2008 stayed 2.8% of foreign tourist accommodated in Poland, what gave the 2<sup>nd</sup> position among all 16 voivodships. The Zachodniopomorskie voivodship occupied the 1<sup>st</sup> position with the index higher only by 0.4 percentage point. As regards the number of nights spent by foreign tourists in above mentioned establishments, Małopolska occupied also the 2<sup>nd</sup> position (2.8% of foreign tourists' overnight stays in the country), although the Zachodniopomorskie voivodship could boast of the share higher by 8.1 percentage points.

TABLE II. TOURISTS ACCOMMODATED AND OVERNIGHT STAYS IN COLLECTIVE TOURIST ACCOMMODATION ESTABLISHMENTS IN THE MAŁOPOLSKIE VOIVODSHIP AND IN THE COUNTRY

| TYPE OF FACILITIES                                     | Tourists accommodated |             |                           |             | Nights spent (overnight stays) |             |                           |             |
|--|-----------------------|-------------|---------------------------|-------------|--------------------------------|-------------|---------------------------|-------------|
|  | total                 |             | of which foreign tourists |             | total                          |             | of which foreign tourists |             |
|  | 2007                  | 2008        | 2007                      | 2008        | 2007                           | 2008        | 2007                      | 2008        |
|  | Poland = 100          |             |                           |             |                                |             |                           |             |
| <b>TOTAL</b> .....                                     | <b>14.9</b>           | <b>13.9</b> | <b>22.3</b>               | <b>20.5</b> | <b>14.6</b>                    | <b>14.0</b> | <b>20.8</b>               | <b>19.5</b> |
| <b>Hotel facilities</b> .....                          | <b>14.3</b>           | <b>13.2</b> | <b>22.0</b>               | <b>20.1</b> | <b>16.0</b>                    | <b>15.3</b> | <b>22.9</b>               | <b>21.4</b> |
| Hotels .....   | 15.2                  | 13.9        | 22.8                      | 20.6        | 16.8                           | 16.0        | 24.2                      | 22.9        |
| Motels .....   | 9.3                   | 8.7         | 16.4                      | 17.2        | 9.9                            | 8.3         | 16.6                      | 16.4        |
| Boarding houses .....                                  | 33.4                  | 34.5        | 29.4                      | 30.6        | 38.8                           | 40.9        | 26.6                      | 25.0        |
| Other hotel facilities .....                           | 5.0                   | 5.2         | 8.7                       | 11.0        | 4.9                            | 5.0         | 6.6                       | 7.7         |
| <b>Other facilities</b> .....                          | <b>16.1</b>           | <b>15.2</b> | <b>24.4</b>               | <b>23.4</b> | <b>13.4</b>                    | <b>13.0</b> | <b>13.7</b>               | <b>12.7</b> |
| Excursion hostels .....                                | 12.9                  | 10.3        | 19.2                      | 18.6        | 13.9                           | 11.3        | 23.5                      | 19.7        |
| Shelters .....   | 55.5                  | 50.3        | 78.1                      | 78.3        | 55.7                           | 50.7        | 76.1                      | 78.1        |
| Youth hostels .....                                    | 38.2                  | 35.3        | 53.1                      | 53.1        | 33.7                           | 31.0        | 49.8                      | 46.6        |
| School youth hostels .....                             | 13.6                  | 12.9        | 10.5                      | 11.5        | 13.2                           | 12.1        | 11.9                      | 9.3         |
| Holiday centres .....                                  | 13.7                  | 13.7        | 11.7                      | 10.7        | 9.7                            | 10.4        | 6.2                       | 6.0         |
| Holiday youth centres .....                            | 5.3                   | 5.0         | 0.4                       | —           | 5.2                            | 5.0         | 0.1                       | —           |
| Training-recreational centres ..                       | 13.1                  | 12.7        | 18.2                      | 21.1        | 14.2                           | 13.5        | 17.5                      | 16.4        |
| Creative arts centres .....                            | 20.0                  | 17.4        | 19.6                      | 18.3        | 25.3                           | 25.3        | 14.7                      | 15.9        |
| Public tourist cottages .....                          | 6.1                   | 6.2         | 16.4                      | 13.3        | 6.0                            | 6.1         | 16.4                      | 12.0        |
| Camping sites .....                                    | 10.5                  | 8.8         | 20.5                      | 15.7        | 7.9                            | 6.7         | 18.1                      | 15.2        |
| Tent camp sites .....                                  | 4.8                   | 4.0         | 6.0                       | 3.1         | 3.4                            | 3.0         | 4.7                       | 3.0         |
| Weekend and holiday accommodation establishments ..... | 49.3                  | 42.4        | 88.9                      | 88.8        | 28.6                           | 26.1        | 74.1                      | 79.9        |
| Health establishments .....                            | 16.6                  | 14.7        | 1.4                       | 0.8         | 16.4                           | 15.1        | 0.9                       | 0.5         |
| Other non-classified facilities ...                    | 21.3                  | 20.2        | 40.4                      | 40.1        | 17.4                           | 16.9        | 36.8                      | 36.8        |

## 2.1.2. Collective tourist accommodation establishments

In 2008 the base of collective tourist accommodation establishments of the Małopolskie voivodship augmented: the number of facilities and bed places increased (both open all year and seasonal) as well as the number of rooms in hotel facilities.

As of the end of July 2008 in the Małopolskie voivodship there were 872 collective tourist accommodation establishments, of which 314 hotel facilities. The number of establishments (in comparison with the previous year) grew by 29; of hotel facilities — by 28 and other facilities — by 1. The number of hotels has been still increasing (by 24) and amounted to 204.

Total number of bed places increased in comparison with June 2007 by 4.7 thous. (by 7.3%) — to 68.8 thous. places, of which in hotel facilities by 3.1 thous. (by 12.2%) — to 28.9 thous., and in other facilities by 1.5 thous. (by 4.0%) — to 39.9 thous. places. The number of bed places in hotels grew by 2.6 thous. (by 12.6%). In total there were more by 3.5 thous. (6.4%) bed places open all year and seasonal ones by 1.1 thous. (12.5%). A share of bed places open all year in total number of bed places in collective tourist accommodation establishments amounted to 85.2%. Traditionally, the most bed places were offered by hotels (23.0 thous.), then other non-classified facilities (11.2 thous.) and holiday centres (9.1 thous.).

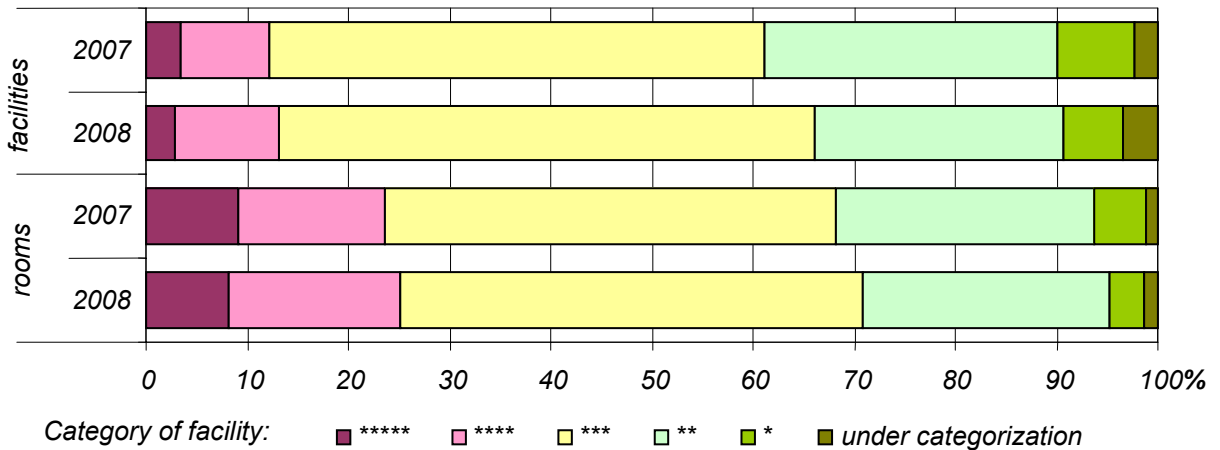
TABLE III. COLLECTIVE TOURIST ACCOMMODATION ESTABLISHMENTS BY TYPE OF FACILITIES  
As of 31 VII

| TYPE OF FACILITIES                                     | Facilities   |              | Bed places   |              | Number of bed places per facility |             |
|--|--------------|--------------|--------------|--------------|-----------------------------------|-------------|
|  | in percent   |              |              |              | 2007                              | 2008        |
|  | 2007         | 2008         | 2007         | 2008         |                                   |             |
| <b>TOTAL</b> .....                                     | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>76.1</b>                       | <b>78.9</b> |
| <b>Hotel facilities</b> .....                          | <b>33.9</b>  | <b>36.0</b>  | <b>40.2</b>  | <b>42.1</b>  | <b>90.2</b>                       | <b>92.2</b> |
| Hotels .....   | 21.4         | 23.4         | 31.9         | 33.4         | 113.5                             | 112.7       |
| Motels .....   | 1.3          | 1.0          | 0.7          | 0.5          | 39.6                              | 40.9        |
| Boarding houses .....                                  | 7.1          | 7.3          | 4.8          | 5.2          | 51.3                              | 56.3        |
| Other hotel facilities .....                           | 4.2          | 4.2          | 2.9          | 2.9          | 53.1                              | 53.4        |
| <b>Other facilities</b> .....                          | <b>66.1</b>  | <b>64.0</b>  | <b>59.8</b>  | <b>57.9</b>  | <b>68.8</b>                       | <b>71.4</b> |
| Excursion hostels .....                                | 1.5          | 1.1          | 1.3          | 1.0          | 62.1                              | 68.8        |
| Shelters .....   | 3.1          | 2.8          | 2.1          | 1.9          | 51.9                              | 53.3        |
| Youth hostels .....                                    | 0.7          | 1.0          | 0.8          | 0.9          | 89.5                              | 72.3        |
| School youth hostels .....                             | 4.3          | 3.8          | 3.3          | 2.9          | 59.2                              | 60.2        |
| Holiday centres .....                                  | 15.8         | 14.8         | 14.4         | 13.3         | 69.5                              | 70.8        |
| Holiday youth centres .....                            | 1.3          | 1.1          | 0.9          | 0.7          | 54.9                              | 51.1        |
| Training-recreational centres .....                    | 8.1          | 8.0          | 8.7          | 8.1          | 82.4                              | 79.7        |
| Creative arts centres .....                            | 1.5          | 1.5          | 0.6          | 0.6          | 31.2                              | 32.6        |
| Public tourist cottages .....                          | 1.7          | 1.6          | 1.4          | 1.2          | 61.9                              | 61.1        |
| Camping sites .....                                    | 1.5          | 1.5          | 2.4          | 2.5          | 120.8                             | 133.3       |
| Tent camp sites .....                                  | 1.5          | 1.4          | 1.5          | 1.2          | 74.1                              | 71.7        |
| Weekend and holiday accommodation establishments ..... | 0.7          | 0.7          | 0.8          | 0.7          | 82.5                              | 82.7        |
| Health establishments .....                            | 4.4          | 4.1          | 7.4          | 6.5          | 128.5                             | 124.3       |
| Other non-classified facilities .....                  | 19.9         | 20.5         | 14.0         | 16.3         | 53.5                              | 62.6        |

An average size of a collective tourist accommodation establishment, measured by the number of bed places, increased by 3 and amounted to 79 places. In this respect the biggest were camping sites (133 places), health establishments (124 places) as well as hotels (113 places). An average number of rooms in hotels decreased and amounted to 53 (in 2007 — 55).

The standard of hotel rooms improved, 94.7% of them were equipped with own bathroom and WC (93.6% as of June 2007). Like the previous year, as of the end of June 2008 in Małopolska 6 hotels had the highest, five-star category. The average number of rooms in these facilities amounted to 150. More than a half of hotels (52.9%) had a middle class, three-star category. These facilities were smaller with 46 rooms in average. The number of four-star hotels increased by 5 (the number of rooms — by 390, i.e., by 27.0%).

**STRUCTURE OF HOTELS BY CATEGORIES OF FACILITIES**  
As of 31 VII



The average motel counted 19 rooms (18 in 2007), and a boarding house — 24 (22 rooms in 2007). 91.0% of rooms in motels and 91.9% in boarding houses were equipped with own bathroom and WC. The Małopolskie motels, boarding houses and camping sites — like the previous year — had three-, two- and one-star category (lack of facilities of a higher standard, i.e. five- and four-star category).

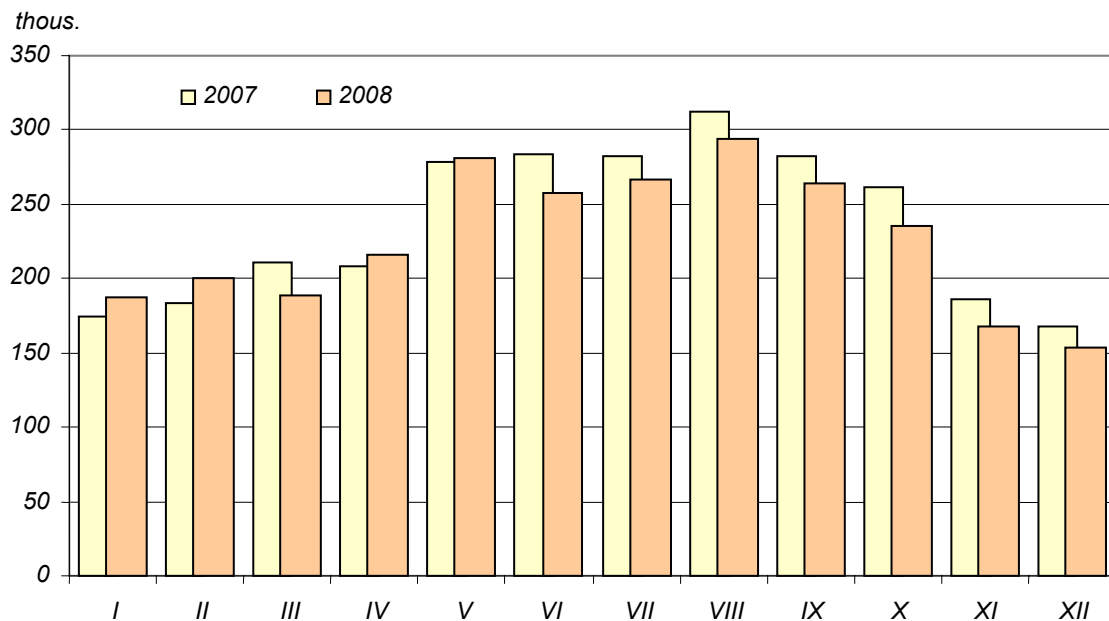
**2.1.3. Tourists accommodated and nights spent (overnight stays) in collective tourist accommodation establishments**

In 2008 the number of people accommodated in collective tourist accommodation establishments amounted to 2711.4 thous. After 6 years of systematical growth, in 2008 the number of tourists accommodated decreased in comparison with the previous year (by 119.0 thous., i.e. by 4.2%). The total decrease of a tourist traffic was caused by the decreasing number of foreign tourists when the number of domestic tourists increased (by 31.4 thous., i.e. by 1.7%). Less people were accommodated almost in all types of facilities and the deepest decrease concerned excursion hostels (by 22.3%). There were exceptions: other hotel facilities (increase by 15.4%), public tourist cottages (increase by 7.8%), boarding houses (increase by 4.1%) and holiday centres (increase by 0.5%), in which the number of tourists accommodated was bigger in relation to 2007.

**TABLE IV. INDICES OF TOURISTS ACCOMMODATED IN COLLECTIVE TOURIST ACCOMMODATION ESTABLISHMENTS**

| YEARS      | Total           | Hotel facilities | Other facilities | Total               | Hotel facilities | Other facilities |
|------------|-----------------|------------------|------------------|---------------------|------------------|------------------|
|            | year 2000 = 100 |                  |                  | previous year = 100 |                  |                  |
| 2001 ..... | 96.5            | 95.4             | 97.5             | 96.5                | 95.4             | 97.5             |
| 2002 ..... | 98.6            | 101.8            | 95.5             | 102.2               | 106.7            | 97.9             |
| 2003 ..... | 104.2           | 106.1            | 102.4            | 105.7               | 104.3            | 107.2            |
| 2004 ..... | 117.4           | 133.9            | 101.5            | 112.6               | 126.2            | 99.1             |
| 2005 ..... | 126.9           | 154.0            | 100.9            | 108.2               | 115.0            | 99.5             |
| 2006 ..... | 134.1           | 168.6            | 101.0            | 105.6               | 109.5            | 100.0            |
| 2007 ..... | 144.1           | 186.0            | 103.9            | 107.5               | 110.3            | 102.9            |
| 2008 ..... | 138.1           | 179.4            | 98.3             | 95.8                | 96.5             | 94.6             |

**TOURISTS ACCOMMODATED  
IN COLLECTIVE TOURIST ACCOMMODATION ESTABLISHMENTS  
BY MONTHS**



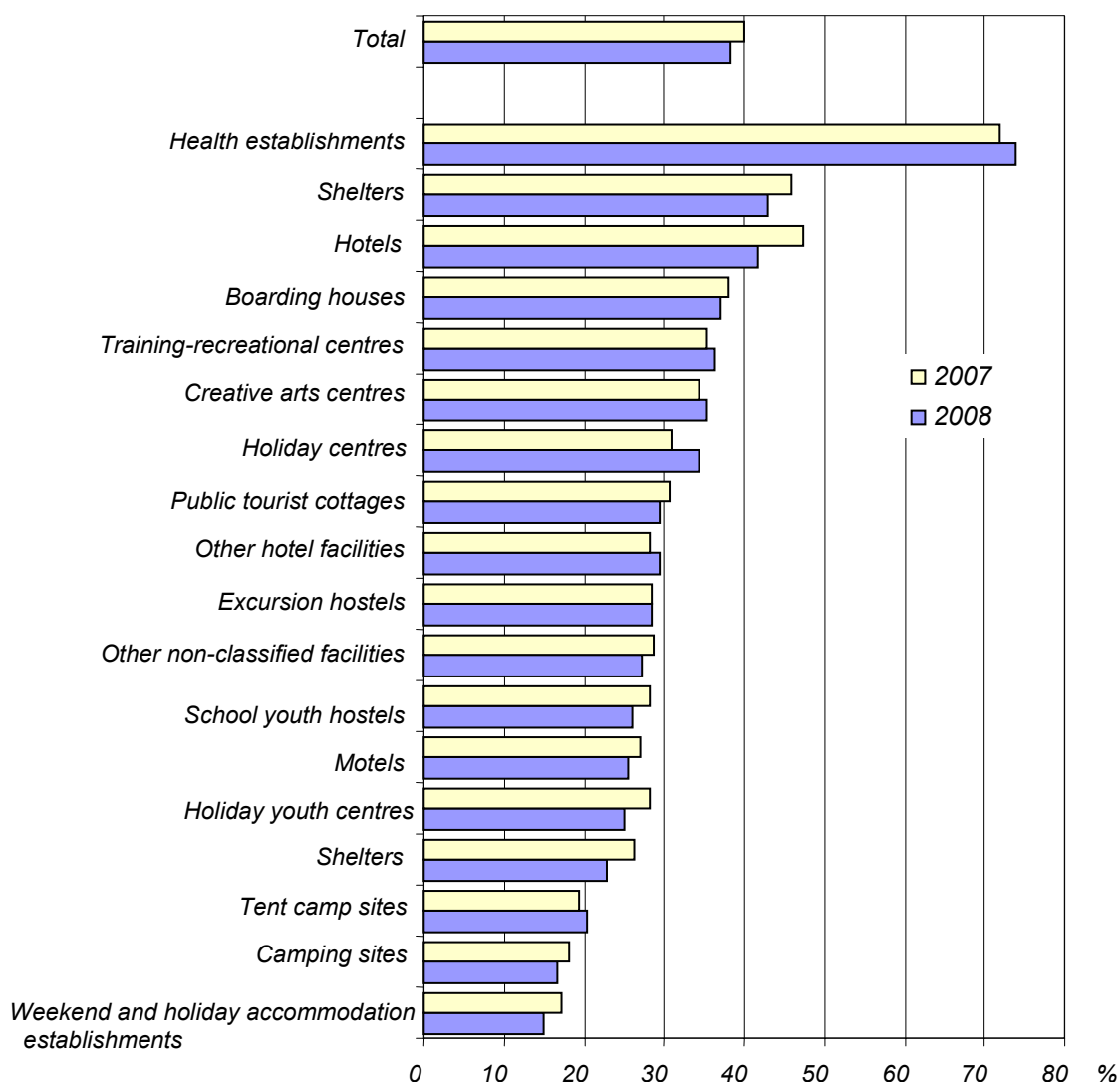
**TABLE V. TOURISTS ACCOMMODATED AND OVERNIGHT STAYS IN COLLECTIVE TOURIST ACCOMMODATION ESTABLISHMENTS BY TYPE OF FACILITIES**

| TYPE OF FACILITIES                                     | Tourists accommodated |              | Nights spent (overnight stays) |              | Average tourist stay at facility in days |            |
|--|-----------------------|--------------|--------------------------------|--------------|--|------------|
|  | in percent            |              |                                |              | 2007                                     | 2008       |
|  | 2007                  | 2008         | 2007                           | 2008         |  |            |
| <b>TOTAL</b> .....                                     | <b>100.0</b>          | <b>100.0</b> | <b>100.0</b>                   | <b>100.0</b> | <b>2.8</b>                               | <b>2.9</b> |
| <b>Hotel facilities</b> .....                          | <b>63.2</b>           | <b>63.7</b>  | <b>48.7</b>                    | <b>48.5</b>  | <b>2.2</b>                               | <b>2.2</b> |
| Hotels .....   | 55.5                  | 55.1         | 40.8                           | 40.0         | 2.1                                      | 2.1        |
| Motels .....   | 1.0                   | 1.0          | 0.5                            | 0.5          | 1.5                                      | 1.4        |
| Boarding houses .....                                  | 4.0                   | 4.4          | 5.3                            | 5.6          | 3.7                                      | 3.7        |
| Other hotel facilities .....                           | 2.7                   | 3.3          | 2.1                            | 2.4          | 2.2                                      | 2.2        |
| <b>Other facilities</b> .....                          | <b>36.8</b>           | <b>36.3</b>  | <b>51.3</b>                    | <b>51.5</b>  | <b>4.0</b>                               | <b>4.2</b> |
| Excursion hostels .....                                | 0.9                   | 0.7          | 1.0                            | 0.8          | 3.3                                      | 3.2        |
| Shelters .....   | 2.3                   | 2.1          | 1.5                            | 1.3          | 1.8                                      | 1.8        |
| Youth hostels .....                                    | 1.6                   | 1.6          | 1.1                            | 1.1          | 2.0                                      | 2.0        |
| School youth hostels .....                             | 2.2                   | 2.0          | 1.8                            | 1.6          | 2.4                                      | 2.4        |
| Holiday centres .....                                  | 7.8                   | 8.1          | 11.6                           | 12.7         | 4.2                                      | 4.6        |
| Holiday youth centres .....                            | 0.2                   | 0.2          | 0.6                            | 0.6          | 7.8                                      | 7.8        |
| Training-recreational centres ..                       | 6.2                   | 6.3          | 7.9                            | 7.7          | 3.6                                      | 3.6        |
| Creative arts centres .....                            | 0.4                   | 0.3          | 0.7                            | 0.6          | 4.7                                      | 5.4        |
| Public tourist cottages .....                          | 0.5                   | 0.6          | 0.7                            | 0.7          | 3.8                                      | 3.6        |
| Camping sites .....                                    | 0.8                   | 0.7          | 0.7                            | 0.6          | 2.4                                      | 2.4        |
| Tent camp sites .....                                  | 0.2                   | 0.1          | 0.2                            | 0.1          | 2.7                                      | 2.9        |
| Weekend and holiday accommodation establishments ..... | 0.6                   | 0.5          | 0.4                            | 0.3          | 1.7                                      | 1.8        |
| Health establishments .....                            | 3.2                   | 3.3          | 14.6                           | 14.7         | 12.8                                     | 13.1       |
| Other non-classified facilities ...                    | 9.9                   | 9.7          | 8.6                            | 8.7          | 2.5                                      | 2.6        |

In 2008 — in comparison with 2007 — the number of overnight stays in collective tourist accommodation establishments of the Małopolskie voivodship also decreased and amounted to 7953.6 thous. The relative decrease of overnight stays (by 0.8%, i.e., by 60.4 thous.) was smaller by 3.4 percentage points than in case of tourists accommodated. An average stay of a tourist in the facility increased and in 2008 it amounted to 2.9 days. These relations show diminishing of tourist traffic of people coming to Małopolska for a short period of time. The deepest decrease of overnight stays was registered in excursion hostels (by 23.0%). The number of nights spent increased in 4 types of facilities: other hotel facilities — by 16.0%, holiday centres — by 8.9%, boarding houses — by 4.6% and public tourist cottages — by 2.4%.

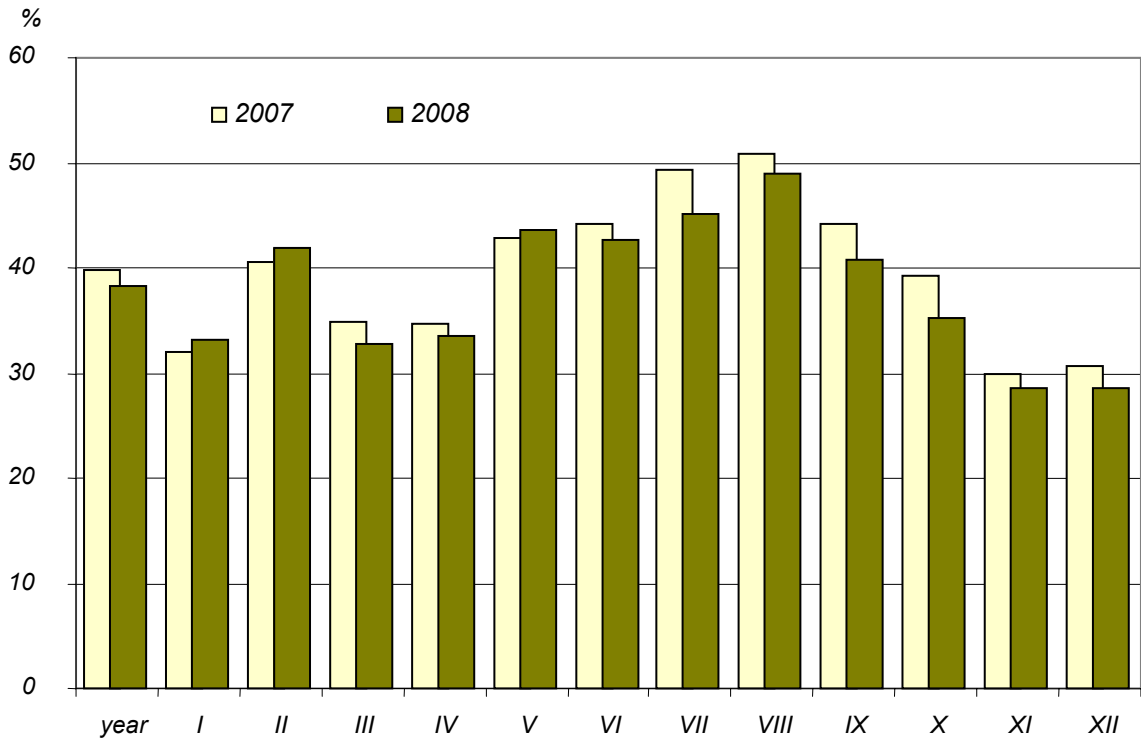
In 2008 when the size of boarding facilities grew and the number of tourists lessened, the occupancy rate of bed places in collective tourist accommodation establishments was lower by 1.6 percentage points and amounted to 38.3%. The biggest decrease of the occupancy rate of bed places was in hotels (by 5.6 percentage points to 41.8%). The occupancy of places increased in 6 types of facilities, the most in holiday centres (by 3.4 percentage points).

### OCCUPANCY RATE OF BED PLACES IN COLLECTIVE TOURIST ACCOMMODATION ESTABLISHMENTS BY TYPE OF FACILITIES



The occupancy rate of rooms in hotel facilities decreased in relation to 2007 by 3.7 percentage points and it amounted to 47.7%. The occupancy rate of rooms in hotels amounted to 49.5% (decline by 4.4 percentage points), in motels — 29.2% (decline by 3.0 percentage points) and in boarding houses — 42.0% (decline by 1.6 percentage point). The occupancy rate of rooms increased only in other hotel facilities (by 1.5 percentage point) and it amounted to 37.9%.

**OCCUPANCY RATE OF BED PLACES  
IN COLLECTIVE TOURIST ACCOMMODATION ESTABLISHMENTS  
BY MONTHS**



**2.1.4. Foreign tourists**

In 2008 among all people accommodated in collective tourist accommodation establishments in the Małopolskie voivodship, foreign tourists accounted for 829.0 thous. (30.6%). Foreign tourists spent 1985.7 thous. nights (25.0% of all overnight stays in collective tourist accommodation establishments).

In relation to 2007 decreased the number of foreign tourists (by 150.5 thous., i.e., by 15.4%), the number of nights spent by them (by 283.2 thous., i.e., by 12.5%) as well as their share in total size of tourism in voivodship (by 4.0 percentage points — of people accommodated and by 3.3 percentage points — of nights spent). Such tendency of foreign tourist traffic in 2008 occurred in the whole country. One can suppose that it was influenced by a high exchange rate of zloty, which caused that arrivals of foreigners to Poland became less financially attractive.

**TABLE VI. INDICES OF FOREIGN TOURISTS ACCOMMODATED IN COLLECTIVE TOURIST ACCOMMODATION ESTABLISHMENTS**

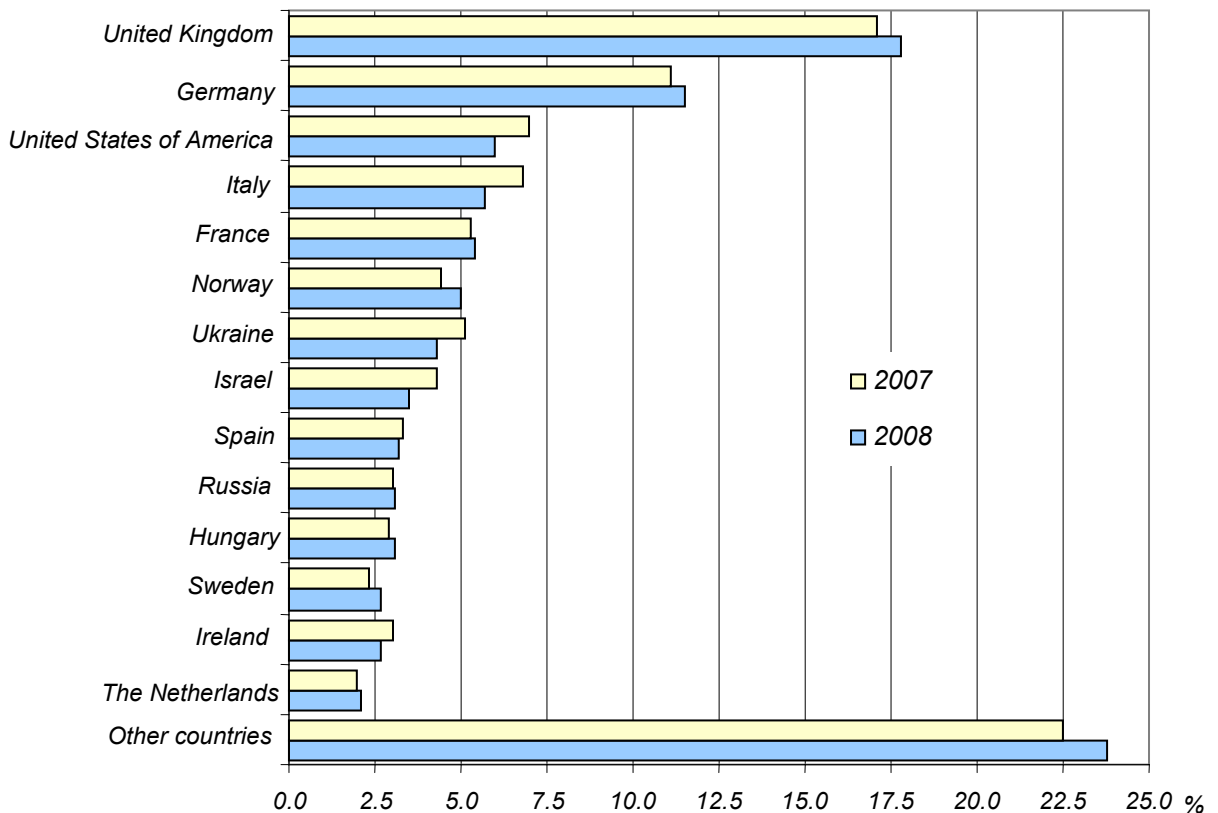
| YEARS      | Total           | Hotel facilities | Other facilities | Total               | Hotel facilities | Other facilities |
|------------|-----------------|------------------|------------------|---------------------|------------------|------------------|
|            | year 2000 = 100 |                  |                  | previous year = 100 |                  |                  |
| 2001 ..... | 100.5           | 97.5             | 111.9            | 100.5               | 97.5             | 111.9            |
| 2002 ..... | 104.1           | 106.6            | 94.5             | 103.6               | 109.4            | 84.5             |
| 2003 ..... | 109.2           | 111.7            | 99.6             | 104.9               | 104.8            | 105.4            |
| 2004 ..... | 143.1           | 152.1            | 108.6            | 131.0               | 136.2            | 109.1            |
| 2005 ..... | 175.4           | 188.9            | 123.7            | 122.6               | 124.2            | 113.9            |
| 2006 ..... | 184.4           | 197.4            | 134.6            | 105.1               | 104.5            | 108.8            |
| 2007.....  | 193.1           | 210.1            | 128.3            | 104.7               | 106.4            | 95.3             |
| 2008.....  | 163.4           | 178.3            | 106.9            | 84.6                | 84.8             | 83.3             |

Most (81.2%) foreign tourist in Małopolska for overnight stay chose hotels, where they accounted for 45.1% of total number of guests (67.9% in five-star hotels). Traditionally, the share of foreigners among tourists accommodated on camping sites was high (56.0%). The share of foreign tourists decreased in almost all types of facilities. It increased only in other hotel facilities (by 3.7 percentage points) and in youth hostels (by 0.1 percentage point).

An average stay of a tourist in the facility amounted to 2.4 days (2.3 days in 2007). The longest was the stay of foreign tourists in health establishments (7.4 days) and the shortest — in motels (1.3 days).

Among tourists whose place of permanent residence was the country other than Poland, Europeans constituted 82.0%, newcomers from Asia — 8.0% and from South America — 6.8%.

STRUCTURE OF FOREIGN TOURISTS ACCOMMODATED  
IN COLLECTIVE TOURIST ACCOMMODATION ESTABLISHMENTS  
BY SELECTED COUNTRY OF PERMANENT RESIDENCE



### 2.1.5. Tourism in Małopolskie voivodship in a territorial breakdown

The tourist centre of the Małopolskie voivodship is its capital, which importance becomes greater every year. In 2008 the base of collective tourist accommodation establishments in Kraków considerably augmented and as of the end of July it included 173 facilities with the total number of 22.4 bed places, i.e., more by 16 facilities (by 10.2%) and by 3.0 thous. places (by 15.6%) in comparison with the end of July 2007. The increase considered mainly hotels, which number augmented by 9 (1.0 thous. bed places in total). Hotels constituted 62.4% of facilities and had 66.2% of places in tourist boarding facilities of Kraków. The share of collective tourist accommodation establishments in Kraków amounted to 19.8% in the voivodship scale (32.6% of bed places).

Boarding facilities density rate (defined as the number of bed places in collective tourist accommodation facilities calculated per 1 km<sup>2</sup> of administrative area) in Kraków was definitely the highest of all powiats. Next, as regards the number of bed places calculated per 100 actual residents (Defert's rate) Kraków was the 4<sup>th</sup> powiat in the voivodship.



As of the end of July 2008 the number of bed places per 1 km<sup>2</sup> amounted for the voivodship to 4.5 in total (4.2 places the year before). Boarding facilities density rate grew in 11 powiats, of which the most in Kraków (by 9.3 places), Tarnów (by 1.6) and the tatrzański powiat (by 1.2).

An average voivodship Defert's rate amounted to 2.1 bed places per 100 actual residents (as of the end of July 2007 — 2.0 places). The increase of Defert's rate was registered in 13 powiats, and the biggest one in the tatrzański powiat (by 0.9 of place), in the proszowicki powiat (by 0.4) and in Kraków (by 0.4). In 2 powiats (the nowosądecki and krakowski) the number of bed places per 100 residents decreased (by 0.1 of place).

TABLE VII. COLLECTIVE TOURIST ACCOMMODATION ESTABLISHMENTS BY POWIATS  
As of 31 VII

| TYPE OF FACILITIES               | Facilities   |              | Bed places   |              | Number of bed places per facility |             |
|----------------------------------|--------------|--------------|--------------|--------------|-----------------------------------|-------------|
|                                  | in percent   |              |              |              | 2007                              | 2008        |
|                                  | 2007         | 2008         | 2007         | 2008         |                                   |             |
| <b>TOTAL</b> .....               | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>76.1</b>                       | <b>78.9</b> |
| <b>POWIATS</b>                   |              |              |              |              |                                   |             |
| Bocheński .....                  | 2.0          | 1.9          | 1.9          | 1.9          | 72.0                              | 75.2        |
| Brzeski .....                    | 1.1          | 1.3          | 0.7          | 0.6          | 53.1                              | 40.4        |
| Chrzanowski .....                | 0.2          | 0.2          | 0.1          | 0.1          | 17.5                              | 17.5        |
| Dąbrowski .....                  | 0.2          | 0.3          | 0.1          | 0.1          | 25.0                              | 22.7        |
| Gorlicki .....                   | 3.0          | 3.1          | 2.6          | 2.5          | 66.1                              | 62.6        |
| Krakowski .....                  | 3.6          | 3.2          | 2.2          | 2.0          | 46.7                              | 48.6        |
| Limanowski .....                 | 3.7          | 3.3          | 2.8          | 2.6          | 58.1                              | 62.1        |
| Miechowski .....                 | 0.1          | 0.1          | 0.1          | 0.1          | 40.0                              | 40.0        |
| Myślenicki .....                 | 1.9          | 1.7          | 1.5          | 1.5          | 60.4                              | 69.6        |
| Nowosądecki .....                | 18.7         | 17.4         | 18.2         | 16.9         | 73.8                              | 76.7        |
| Nowotarski .....                 | 15.8         | 15.8         | 12.2         | 11.7         | 58.9                              | 58.4        |
| Olkuski .....                    | 1.2          | 1.5          | 0.7          | 0.8          | 45.5                              | 40.8        |
| Oświęcimski .....                | 0.8          | 1.0          | 0.8          | 1.0          | 74.7                              | 73.8        |
| Proszowicki .....                | 0.1          | 0.3          | 0.0          | 0.2          | 21.0                              | 53.0        |
| Suski .....                      | 4.9          | 4.9          | 3.2          | 3.2          | 50.3                              | 50.6        |
| Tarnowski .....                  | 1.1          | 1.1          | 0.6          | 0.7          | 42.1                              | 48.9        |
| Tatrzański .....                 | 17.1         | 17.2         | 17.4         | 17.0         | 77.4                              | 78.0        |
| Wadowicki .....                  | 2.3          | 1.9          | 2.0          | 1.9          | 67.1                              | 78.8        |
| Wielicki .....                   | 1.5          | 1.3          | 0.9          | 0.8          | 42.1                              | 50.3        |
| <b>CITIES WITH POWIAT STATUS</b> |              |              |              |              |                                   |             |
| Kraków .....                     | 18.6         | 19.8         | 30.3         | 32.6         | 123.6                             | 129.6       |
| Nowy Sącz .....                  | 1.2          | 1.1          | 1.0          | 0.9          | 61.3                              | 61.2        |
| Tarnów .....                     | 0.9          | 1.1          | 0.9          | 1.0          | 70.9                              | 68.8        |

1287.2 thous. of people, of which 684.1 (53.1%) of foreign tourists were accommodated in collective tourist accommodation establishments in Kraków. The total number of tourist decreased in relation to 2007 by 147.6 thous. (by 10.3%) and of foreign tourists — by 135.9 thous. (by 16.6%). The number of overnight stays amounted to 2735.0 thous. (decline by 232.6 thous., i.e., by 7.8%), of which foreign tourists — 1633.2 thous. (less by 250.9 thous., i.e., by 13.3%). A relative decline of tourists accommodated and overnight stays was deeper in Kraków than in the voivodship, respectively by 6.1 and 7.0 percentage points, and among foreign tourists — by 1.2 and 0.8 percentage points. As regards the number of tourists accommodated calculated per 100 of actual residents, Kraków was the 2<sup>nd</sup> (after the tatrzański) powiat.

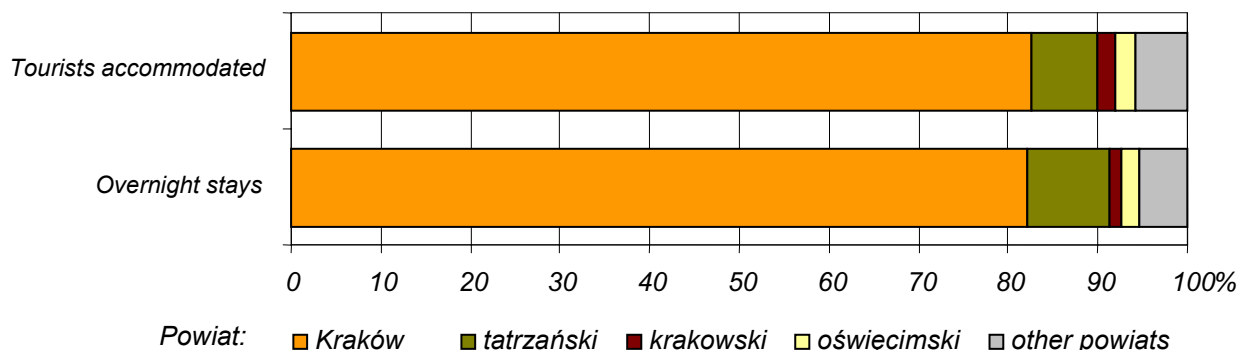
Tourist traffic intensity rate (Schneider's rate) in the voivodship in total amounted to 82.6 (in 2007 — 86.4). In 14 powiats its level increased and the most in the tatrzański powiat (by 22.1). In 8 powiats the number of tourists accommodated per 100 of actual residents decreased and the most in Kraków (by 19.5).

The occupancy rate of bed places (calculated as a percentage share of overnight stays to the nominal number of bed places in collective tourist accommodation establishments), while decreasing in the voivodship, in 9 powiats increased (the most in the dąbrowski powiat — by 6.3 percentage points). In 2 powiats the occupancy rate of bed places remained at the same level and in 11 — it decreased (the most in Kraków — by 6.1 percentage points).

TABLE VIII. TOURISTS ACCOMMODATED AND OVERNIGHT STAYS IN COLLECTIVE TOURIST ACCOMMODATION ESTABLISHMENTS BY POWIATS

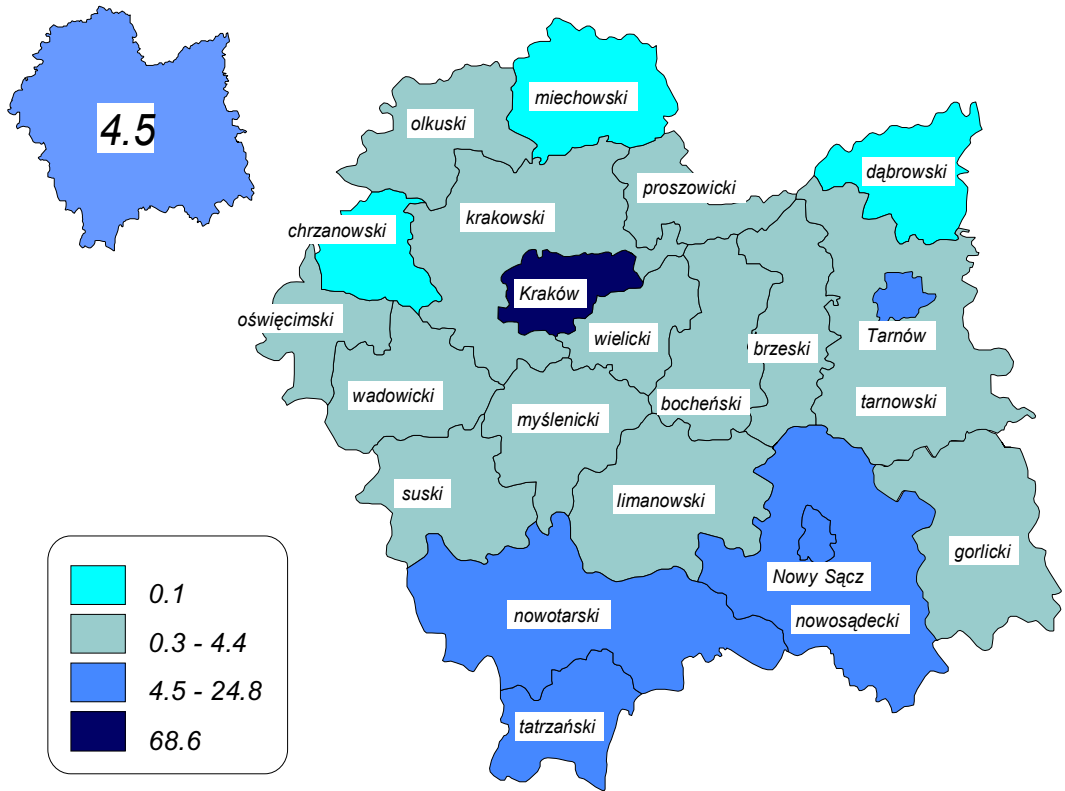
| TYPE OF FACILITIES               | Tourists accommodated |              | Nights spent (overnight stays) |              | Average tourist stay at facility in days |            |
|----------------------------------|-----------------------|--------------|--------------------------------|--------------|--|------------|
|                                  | in percent            |              |                                |              | 2007                                     | 2008       |
|                                  | 2007                  | 2008         | 2007                           | 2008         |  |            |
| <b>TOTAL</b> .....               | <b>100.0</b>          | <b>100.0</b> | <b>100.0</b>                   | <b>100.0</b> | <b>2.8</b>                               | <b>2.9</b> |
| <b>POWIATS</b>                   |                       |              |                                |              |  |            |
| <i>Bocheński</i> .....           | 2.4                   | 2.1          | 1.2                            | 1.0          | 1.4                                      | 1.5        |
| <i>Brzeski</i> .....             | 0.5                   | 0.6          | 0.5                            | 0.5          | 3.3                                      | 2.3        |
| <i>Chrzanowski</i> .....         | 0.1                   | 0.1          | 0.1                            | 0.1          | 1.8                                      | 1.8        |
| <i>Dąbrowski</i> .....           | 0.0                   | 0.0          | 0.0                            | 0.0          | 1.6                                      | 1.8        |
| <i>Gorlicki</i> .....            | 1.5                   | 1.6          | 2.2                            | 2.6          | 4.3                                      | 4.7        |
| <i>Krakowski</i> .....           | 3.3                   | 3.1          | 1.9                            | 1.7          | 1.6                                      | 1.6        |
| <i>Limanowski</i> .....          | 1.0                   | 0.9          | 1.1                            | 1.1          | 3.2                                      | 3.4        |
| <i>Miechowski</i> .....          | 0.0                   | 0.1          | 0.0                            | 0.0          | 1.2                                      | 1.2        |
| <i>Myślenicki</i> .....          | 0.7                   | 0.7          | 0.6                            | 0.6          | 2.4                                      | 2.4        |
| <i>Nowosądecki</i> .....         | 9.2                   | 10.1         | 18.9                           | 20.3         | 5.8                                      | 5.9        |
| <i>Nowotarski</i> .....          | 5.6                   | 6.1          | 11.1                           | 11.2         | 5.6                                      | 5.4        |
| <i>Olkuski</i> .....             | 0.6                   | 0.7          | 0.5                            | 0.6          | 2.3                                      | 2.4        |
| <i>Oświęcimski</i> .....         | 0.9                   | 1.1          | 0.7                            | 0.8          | 2.3                                      | 2.2        |
| <i>Proszowicki</i> .....         | 0.1                   | 0.1          | 0.0                            | 0.1          | 1.6                                      | 1.6        |
| <i>Suski</i> .....               | 1.7                   | 1.7          | 1.9                            | 2.0          | 3.3                                      | 3.3        |
| <i>Tarnowski</i> .....           | 0.7                   | 0.8          | 0.5                            | 0.5          | 2.0                                      | 1.9        |
| <i>Tatrzański</i> .....          | 16.5                  | 17.7         | 18.7                           | 19.6         | 3.2                                      | 3.3        |
| <i>Wadowicki</i> .....           | 1.6                   | 1.6          | 1.1                            | 1.1          | 1.9                                      | 2.0        |
| <i>Wielicki</i> .....            | 1.0                   | 1.1          | 0.6                            | 0.6          | 1.7                                      | 1.5        |
| <b>CITIES WITH POWIAT STATUS</b> |                       |              |                                |              |  |            |
| <i>Kraków</i> .....              | 50.7                  | 47.5         | 37.0                           | 34.4         | 2.1                                      | 2.1        |
| <i>Nowy Sącz</i> .....           | 0.8                   | 0.8          | 0.5                            | 0.5          | 1.8                                      | 1.7        |
| <i>Tarnów</i> .....              | 1.3                   | 1.4          | 0.8                            | 0.9          | 1.7                                      | 1.8        |

STRUCTURE OF FOREIGN TOURISTS ACCOMMODATED AND OVERNIGHT STAYS IN COLLECTIVE TOURIST ACCOMMODATION ESTABLISHMENTS BY POWIATS IN 2008



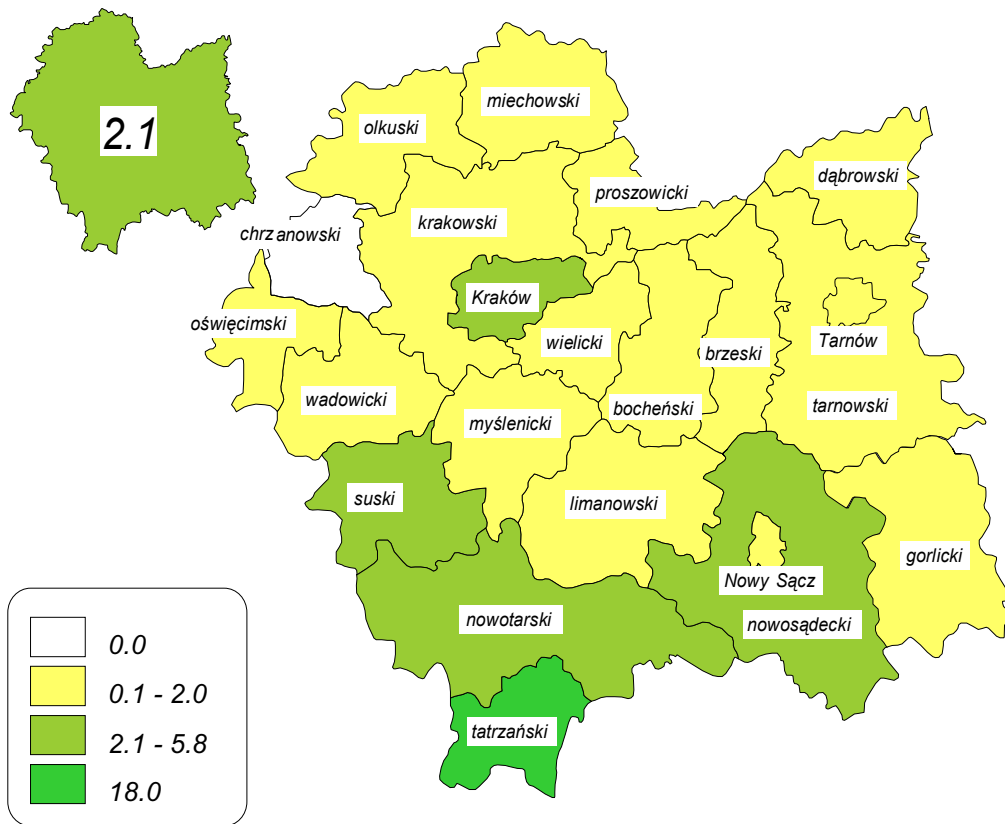
Graphs present the values of: Defert's rate, boarding facilities density rate and Schneider's rate in powiat breakdown. Powiats with the highest and the lowest indices are indicated and class intervals are assumed to display powiats with intensity rate above and below the voivodship average. In Małopolska we can distinguish 2 significant tourist areas — the city of Kraków and powiats situated in south part of the voivodship (the tatrzański, nowosądecki and nowotarski).

BOARDING FACILITIES DENSITY RATE<sup>1</sup>  
BY POWIATS IN 2008



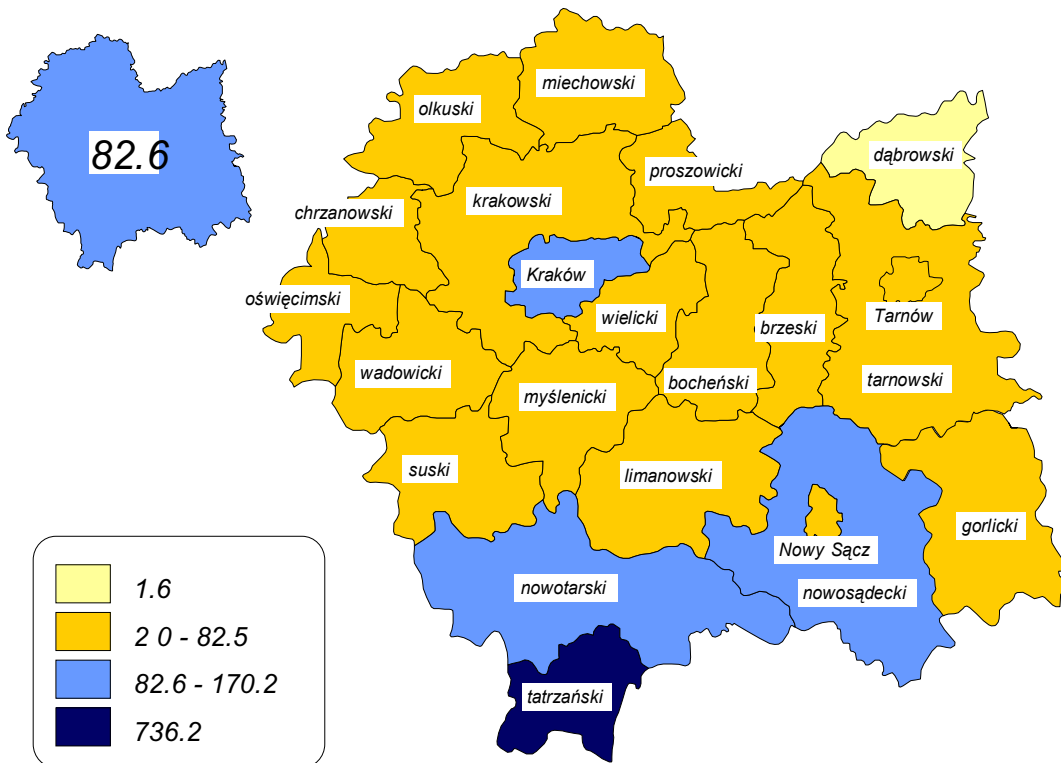
<sup>1</sup> The number of bed places per 1 km<sup>2</sup>.

POWIATY'S TOURIST FUNCTION RATE (DEFERT'S RATE)<sup>2</sup>  
BY POWIATY IN 2008



<sup>2</sup> The number of bed places per 100 residents.

TOURIST TRAFFIC INTENSITY RATE (SCHNEIDER'S RATE)<sup>3</sup>  
BY POWIATS IN 2008



<sup>3</sup> The number of tourist accommodated per 100 residents.