

2. RESULTS OF SURVEYS — SYNTHESIS

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 km², 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 km² (122 persons per km² 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 1st 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 3rd position.

Hotel facilities in Małopolska accounted for 4.6% of collective tourist accommodation establishments in Poland, what gave the 1st 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 3rd 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			
TOTAL	12.5	12.7	11.0	11.5
Hotel facilities	11.7	11.9	13.5	13.7
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
Other facilities	13.0	13.2	9.8	10.3
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 2nd position among all 16 voivodships. The Zachodniopomorskie voivodship occupied the 1st 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 2nd 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							
TOTAL	14.9	13.9	22.3	20.5	14.6	14.0	20.8	19.5
Hotel facilities	14.3	13.2	22.0	20.1	16.0	15.3	22.9	21.4
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
Other facilities	16.1	15.2	24.4	23.4	13.4	13.0	13.7	12.7
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.).

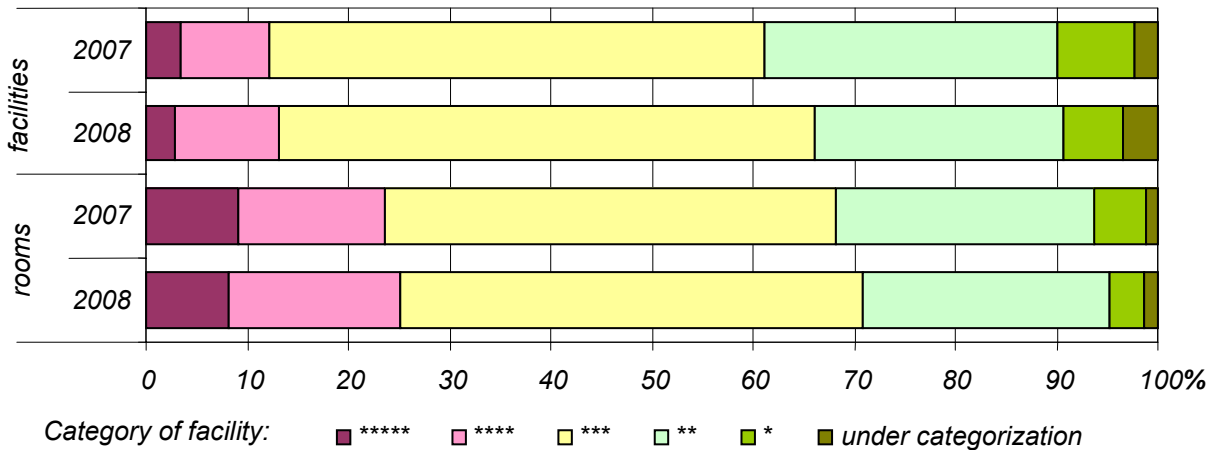
TABLE III. COLLECTIVE TOURIST ACCOMMODATION ESTABLISHMENTS BY TYPE OF FACILITIES
As of 31 VII

TYPE OF FACILITIES	Facilities		Bed places		Number of bed places per facility	
	in percent				2007	2008
	2007	2008	2007	2008		
TOTAL	100.0	100.0	100.0	100.0	76.1	78.9
Hotel facilities	33.9	36.0	40.2	42.1	90.2	92.2
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
Other facilities	66.1	64.0	59.8	57.9	68.8	71.4
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**

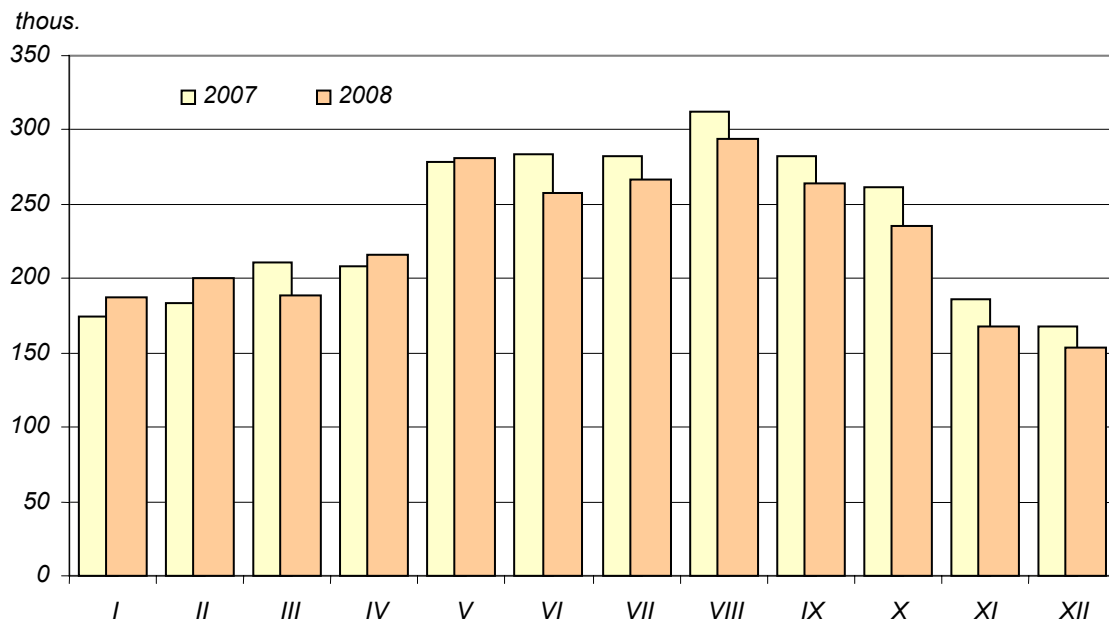


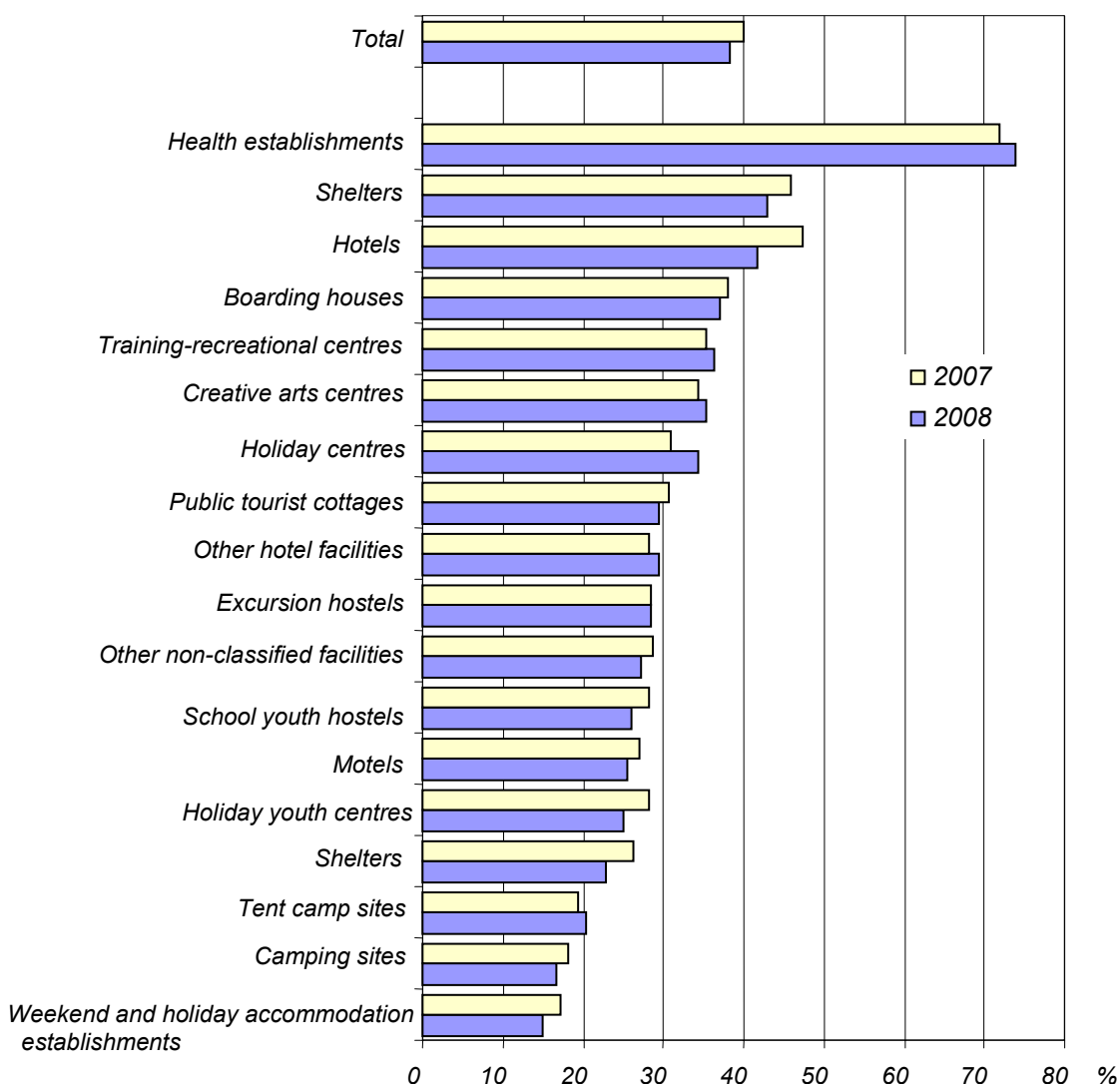
TABLE V. TOURISTS ACCOMMODATED AND OVERNIGHT STAYS IN COLLECTIVE TOURIST ACCOMMODATION ESTABLISHMENTS BY TYPE OF FACILITIES

TYPE OF FACILITIES	Tourists accommodated		Nights spent (overnight stays)		Average tourist stay at facility in days	
	in percent				2007	2008
	2007	2008	2007	2008		
TOTAL	100.0	100.0	100.0	100.0	2.8	2.9
Hotel facilities	63.2	63.7	48.7	48.5	2.2	2.2
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
Other facilities	36.8	36.3	51.3	51.5	4.0	4.2
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%.

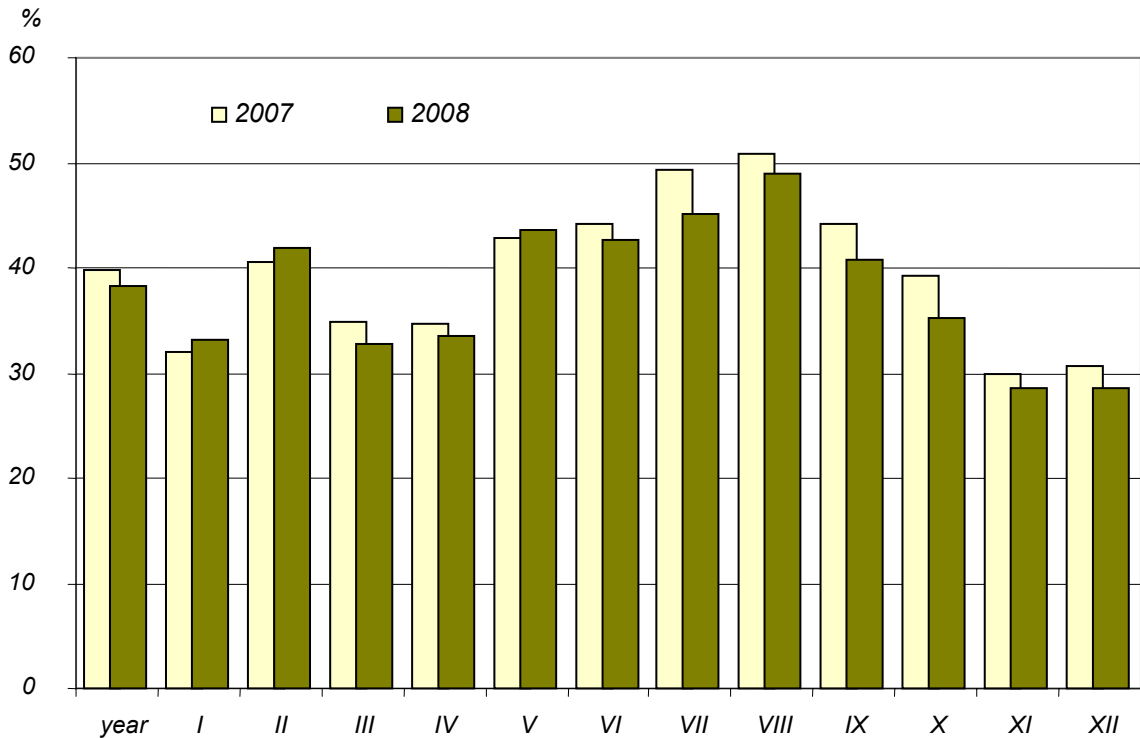
In 2008 when the size of boarding facilities grew and the number of tourists lessened, the occupancy rate of bed places in collective tourist accommodation establishments was lower by 1.6 percentage points and amounted to 38.3%. The biggest decrease of the occupancy rate of bed places was in hotels (by 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

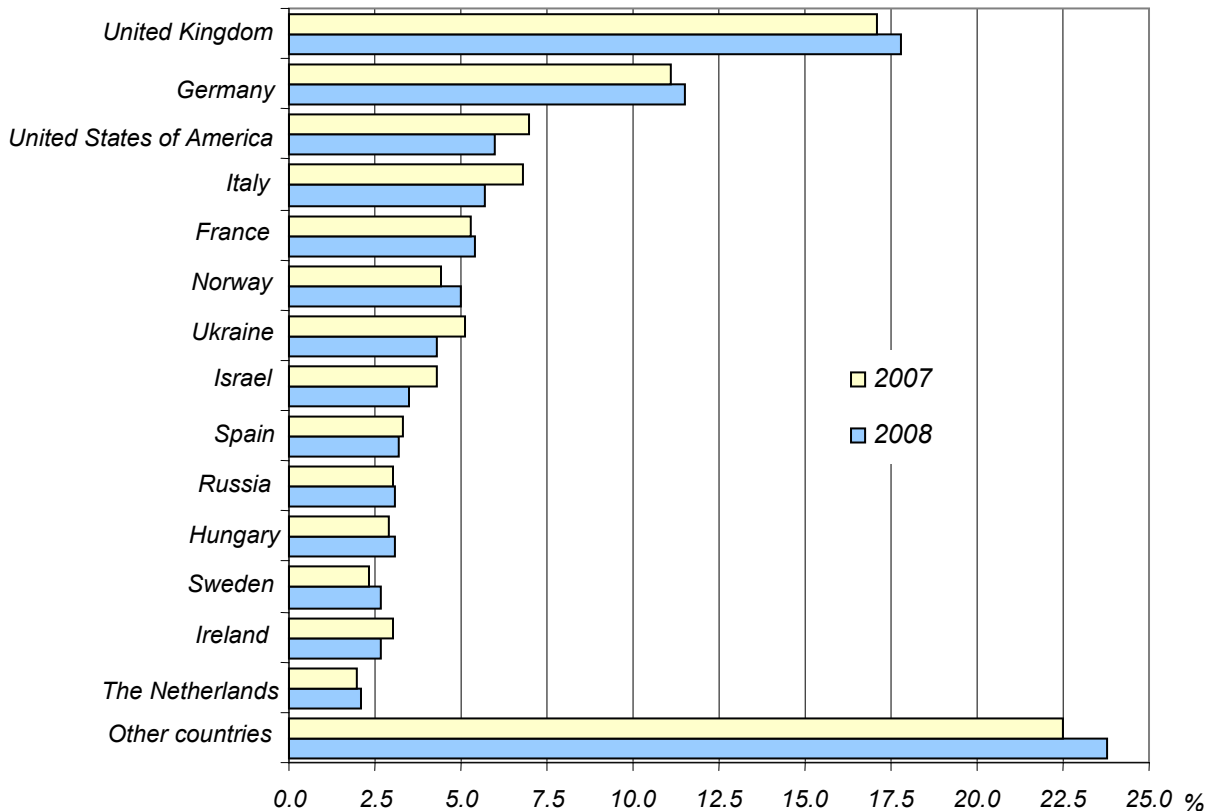
YEARS	Total	Hotel facilities	Other facilities	Total	Hotel facilities	Other facilities
	year 2000 = 100			previous year = 100		
2001	100.5	97.5	111.9	100.5	97.5	111.9
2002	104.1	106.6	94.5	103.6	109.4	84.5
2003	109.2	111.7	99.6	104.9	104.8	105.4
2004	143.1	152.1	108.6	131.0	136.2	109.1
2005	175.4	188.9	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 km² 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 4th powiat in the voivodship.

As of the end of July 2008 the number of bed places per 1 km² 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		
TOTAL	100.0	100.0	100.0	100.0	76.1	78.9
POWIATS						
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
CITIES WITH POWIAT STATUS						
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 2nd (after the tatrzański) powiat.

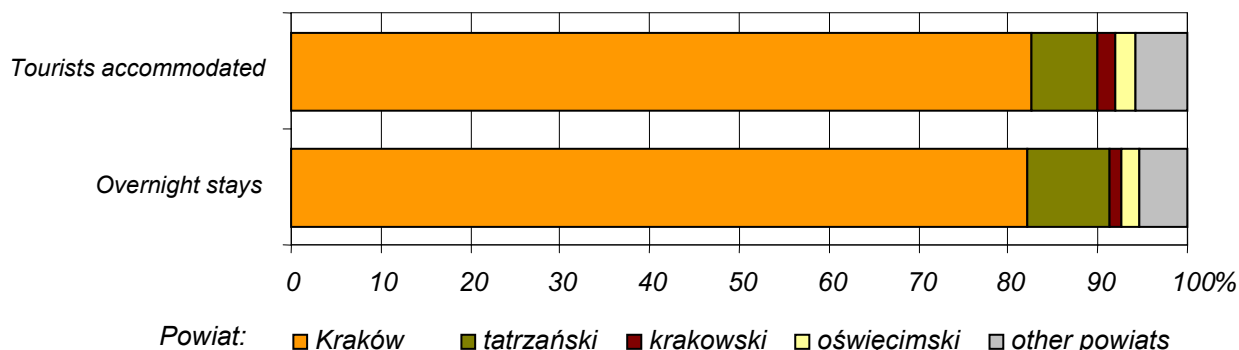
Tourist traffic intensity rate (Schneider's rate) in the voivodship in total amounted to 82.6 (in 2007 — 86.4). In 14 powiats its level increased and the most in the tatrzański powiat (by 22.1). In 8 powiats the number of tourists accommodated per 100 of actual residents decreased and the most in Kraków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

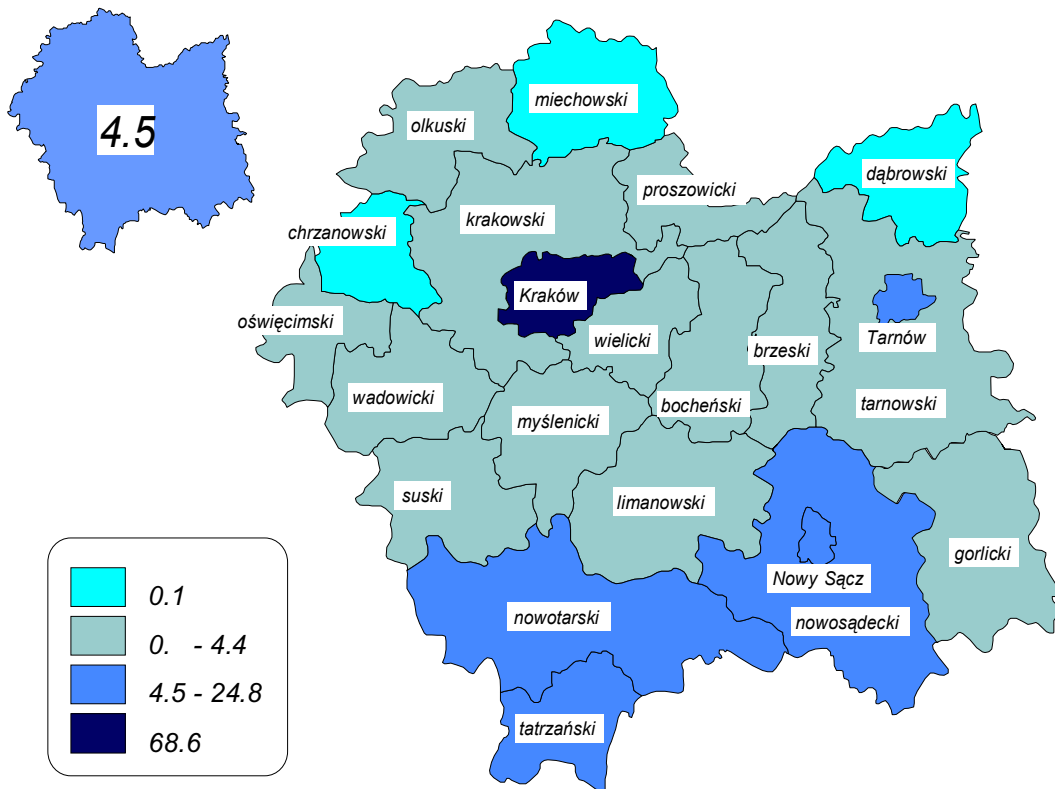
TYPE OF FACILITIES	Tourists accommodated		Nights spent (overnight stays)		Average tourist stay at facility in days	
	in percent				2007	2008
	2007	2008	2007	2008		
TOTAL	100.0	100.0	100.0	100.0	2.8	2.9
POWIATS						
<i>Bocheński</i>	2.4	2.1	1.2	1.0	1.4	1.5
<i>Brzeski</i>	0.5	0.6	0.5	0.5	3.3	2.3
<i>Chrzanowski</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
CITIES WITH POWIAT STATUS						
<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



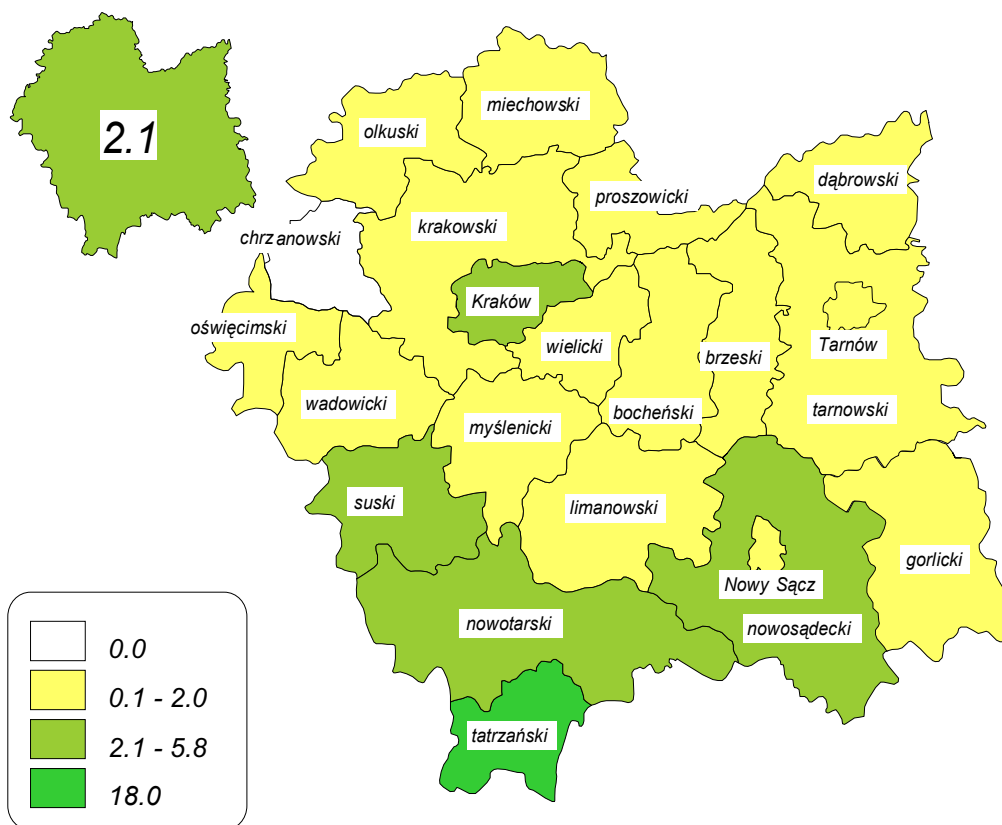
Graphs present the values of: Defert's rate, boarding facilities density rate and Schneider's rate in powiat breakdown. Powiats with the highest and the lowest indices are indicated and class intervals are assumed to display powiats with intensity rate above and below the voivodship average. In Małopolska 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 RATE¹
BY POWIATS IN 2008



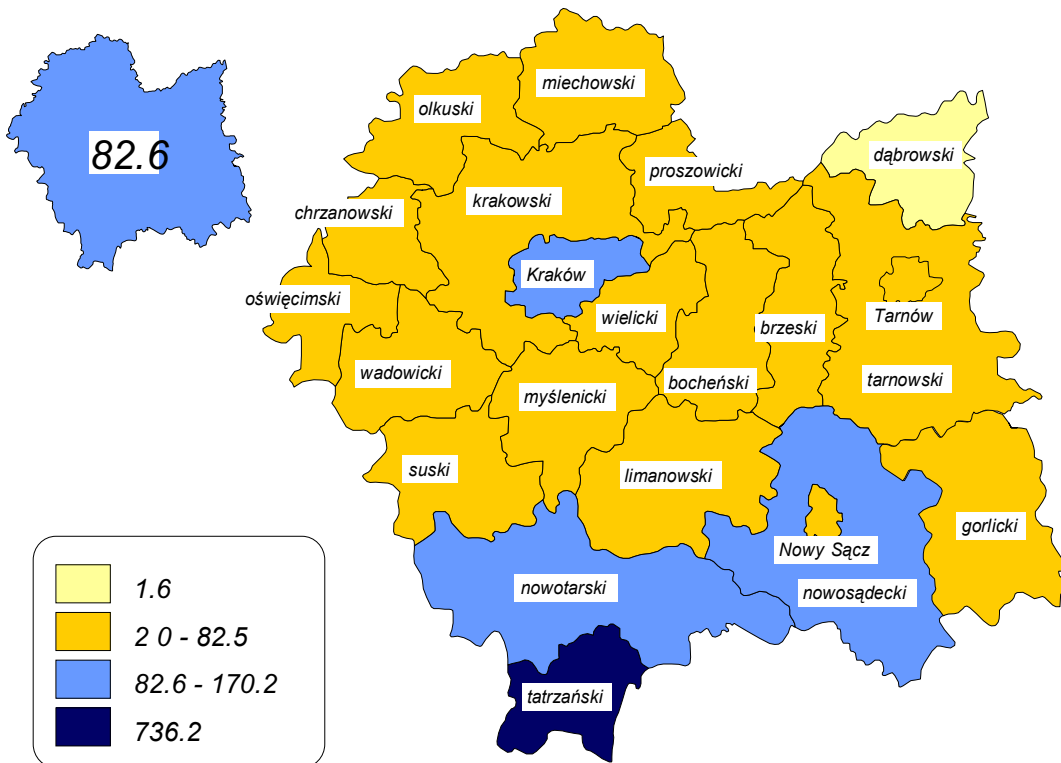
¹ The number of bed places per 1 km².

POWIATY'S TOURIST FUNCTION RATE (DEFERT'S RATE)²
BY POWIATY IN 2008



² The number of bed places per 100 residents.

TOURIST TRAFFIC INTENSITY RATE (SCHNEIDER'S RATE)³
BY POWIATS IN 2008



³ The number of tourist accommodated per 100 residents.

2.2. SELECTED ASPECTS OF TOURISM ACCORDING TO NON-STATISTICAL SOURCES

2.2.1. The Wieliczka Salt Mine ⁴

The historic Salt Mine in Wieliczka is one of the most attractive and the world's most famous tourist sites. **Year 2008 was the 30th anniversary of entering the Wieliczka Salt Mine on the UNESCO List of World Cultural and Natural Heritage.**

Already since neolithic times in Wieliczka region, salt, as precious as gold, was acquired from brine springs through heating the brine and vaporisation of water. In the middle of the 13th century the excavation of rock salt began.

Since its beginning the Wielicka salina constituted an important source of royal revenue — in the 14th century it generated 30% of all the state's income. The salt mine maintained the royal court and paid for the upkeep of the castles guarding the trade routes and also for the activity of the Krakow Academy. The profits drawn from the salt trade allowed for development of the Wawel Castle. In the 16th century the mine became one of the largest business enterprises in Europe at that time.

In the 16th century the Wieliczka Salt Mine used to be shown to the privileged visitors of the Wawel royal court. Towards the end of the 15th century tourist activity began in the mine. Few, privileged visitors (members of the upper classes, possessing each time an explicit approval of the king) were let down on thick ropes, then with torches they visited cavities carved in the salt rock. The conditions of visiting the mine improved only after building wooden staircase in one of shafts in 1744. The Austrian rule in the mine meant a further step in the development of tourism. The Austrians correctly estimated the values of the mine, advertising it as one of the prime visiting sites of the Austrian Monarchy. At the end of the 18th century a few dozen of people visited the mine monthly and at the beginning of the 19th century this number increased to one hundred of people weekly. In the course of years new routes and chambers were adapted to visiting; balls, shows, boat rides on salt lakes and even fireworks were organized in the middle of excursions. In the latter part of the 19th century, horse-cars transported tourists. In the 19th century many kings, writers, artists and scientists visited the mine. It became famous all over the world.

Early in the 20th century another tourist attraction was added, namely, the Chapel of the Saint Kinga. The visiting rules were defined as well as days and hours of opening and prices of tickets. Between the two world wars the number of tourists considerably increased. Next, in the period of Nazi occupation, the only visitors were the German VIPs.

After the end of the Second World War, there was a rapid increase of the number of tourists visiting underground routes — in 1945 there were already more than 10 thousand people and this number continued to grow, reaching about 200 thousand in 1955. A large number of visitors to the mine caused the necessity of indispensable renovation of passages and facilities and also preparation of new tourist routes and chambers. In the years 1959-1964 all renovation works were carried out, independent ventilation system for the underground excavation was made and electric wiring was installed. The following years brought a systematical improvement of catering for tourism, which in the mid-1970s caused an increase of number of tourists to 750 thousand annually.

In 1978 the Wieliczka Salt Mine was inscribed in the UNESCO First List of World Cultural and Natural Heritage (United Nations Educational, Scientific and Cultural Organisation), together with 11 other sites from around the world (of which, i.a. Krakow Market Square).

In 1994 the mine was acknowledged as the National History Monument by the President of the Republic of Poland.

At present, the mine consists of approximately 3000 chambers and nearly 300 kilometres of subterranean corridors lying on 9 levels, of which a 3.5-kilometres section is accessible to tourists. At the mine there is an underground sanatorium, the Krakow Saltworks Museum, a restaurant, a post office and

⁴ Elaborated on the basis of: Information from Marketing Division of the "Wieliczka" Salt Mine Tourist Route Ltd.; Janusz Podlecki, Wieliczka. The historic salt mine (3rd edition, revised and changed). Publ. „Karpaty” – Andrzej Łączyński, Kraków 2007; the UNESCO First List of World Cultural and Natural Heritage of 9 September 1978; website <http://www.kopalnia.pl/>

souvenir shops; various types of social events are organized such as concerts, film screenings, sport performances. The Wieliczka Salt Mine is visited annually by approximately million tourists from Poland and rest of the world.

TABLE IX. VISITORS TO THE "WIELICZKA" SALT MINE

Specification	2000	2005	2007	2008
	in thousand			
TOTAL	758.2	1028.7	1159.6	1097.5
Domestic	533.6	452.6	483.9	470.2
Foreign	224.6	576.1	675.7	627.3
of which from:				
Great Britain	15.0	39.0	85.0	87.0
Germany	30.0	53.7	44.1	43.4
France	18.3	41.2	40.4	38.0
Korea	5.8	27.2	33.7	34.9
Italy	13.4	42.2	43.7	34.6
USA	38.2	53.4	45.9	32.5
Norway	10.9	22.6	29.4	29.2
Russia	2.4	25.3	34.7	27.9
Spain	4.1	20.3	25.3	26.2
Hungary	6.6	22.5	21.2	24.9

Note. 10 countries are specified, from which the number of visitors in 2008 was the biggest.

2.2.2. Tatra National Park ⁵

The Tatra Mountains located in Małopolska are one of the most attractive tourist areas of Poland. It is the only territory in Poland with high mountain character, visited by the large number of domestic and foreign tourists. In order to preserve plants and animals as well as unique landscape, this area is totally protected. The Tatra National Park was created in October 1954. It began its activity on 1st January 1955.

The Tatra National Park has an area of 21164 ha. It is one of the largest national parks in Poland. Forests and thickets of dwarf mountain pine (15048 ha) constitute approximately 70% of the area of the park and the remaining 30% is alpine grass, rocks and waters. Almost 11500 ha of the area are strictly protected, of which all belt of meadows and crags, a belt of dwarf mountain pine and partially also forests of upper and lower belt.

The Tatra National Park borders on the National Park of Slovakia (TANAP), together they constitute the International Biosphere Reserve created in 1992 by UNESCO.

At the Park there is the highest point of Poland — the northern peak of Rysy (2499 m above the sea level), by which a border of the country passes. The highest peak located totally on the area of Poland is Kozi Wierch (2291 m above the sea level).

Flora of the Tatra National Park includes more than 1000 vascular plants, of which 102 species of protected plants (28 of them are on the Polish red list of endangered plants). From among 450 mountain species, for almost 250 it is the only place of occurrence in Poland. It is home to above 80% of Polish endemic plants.

Fauna includes 290 species of vertebrates and 5-6 thousand species of invertebrates. From among vertebrates on the area of the Polish Tatra Mountains there were showed so far 53 species of mammals, 101

⁵ Elaborated on the basis of: the Regulation of the Council of Ministers dated 30 October 1954 regarding the creation of the Tatra National Park (*Journal of Laws* No. 4 item 23); the Regulation of the Council of Ministers dated 1 April 2003 regarding the Tatra National Park (*Journal of Laws* No. 65 item 599; Paweł Skawiński, Tomasz Zwijacz-Kozica, Tatra National Park, series: Meetings with nature, Publishing House „Multico”, Warsaw 2005;

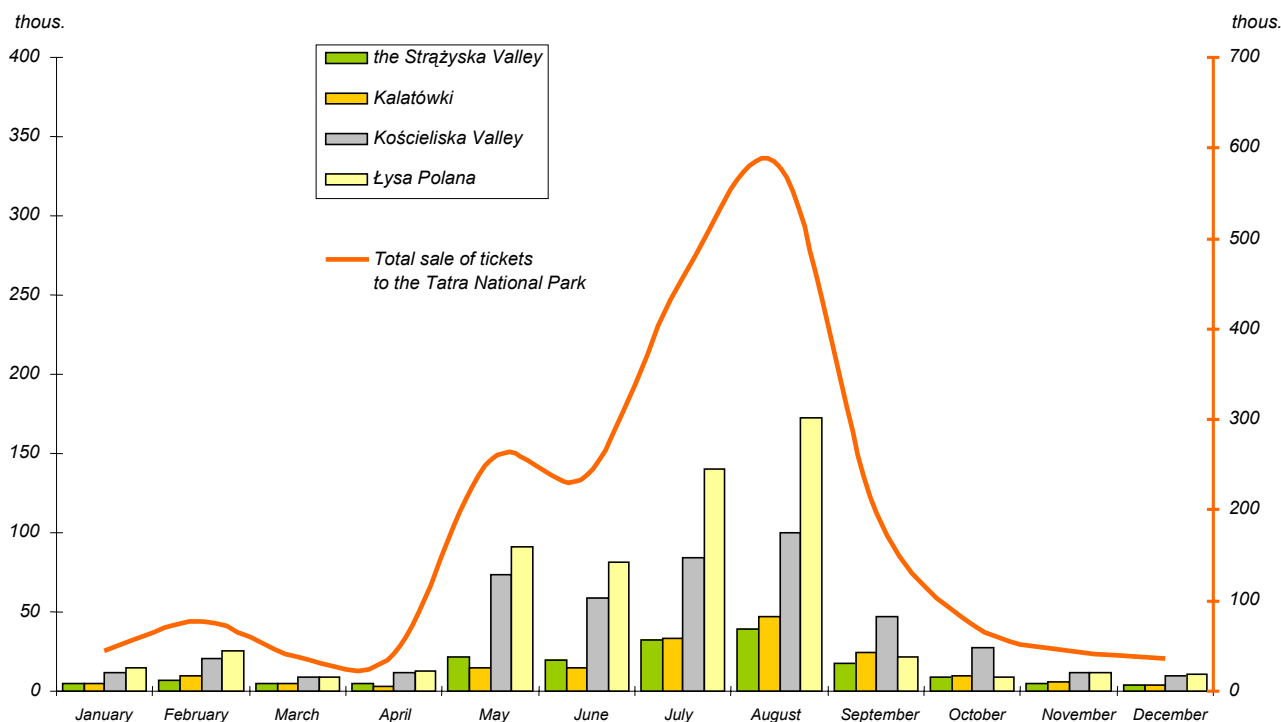
species of birds and 6 species of fish. From the group of reptiles there are 3 species and from the group of amphibians the occurrence of 7 species is proved.

Numerous sources and streams with the total length exceeding 300 kilometres make the landscape of the Park more attractive. On the threshold of the Valley of Five Polish Lakes there is Siklawa — the highest Polish waterfall (about 70 m of height). By the way to the Morskie Oko Lake, on the Roztoka Stream in the Roztoka Valley, one can see the most popular Tatra waterfall called Wodogrzmoty Mickiewicza. The biggest waterfall of the Polish part of Western Tatras is Siklawica in the Strażyska Valley.

At the Park there are about 100 lakes and ponds called staw (pond). They cover altogether an area of about 148 ha. The largest of them is the Morskie Oko Lake with an area of almost 35 ha and depth of 51 m. Wielki Staw Polski has just a little lower area — over 34 ha — but it is the deepest lake at the Park (depth of 79 m) and the second one regarding the depth in Poland.

The Tatra National Park is one of the most visited tourist area in Poland. The entrance to the Park is charged — tickets are sold at 14 points of entrance to the Park. In 2008 jointly 2078.7 thousand of tickets were sold.

SALE OF ENTRANCE TICKETS TO THE TATRA NATIONAL PARK AT SELECTED PLACES BY MONTHS IN 2008



Note. There were presented places of entrance to the Park, where the most tickets were sold.

The entry of motor vehicles to the Park is forbidden. A tourist attraction is a possibility of horse-drawn cart ride in summer and sleigh ride in winter through valleys: Chochołowska, Kościeliska, Bystra, Rybiego Potoku (the Rybi Stream).

At the entrance points to the Park parking lots were created for passenger cars and buses. They are situated at following places: the Kościeliska Valley (Kiry), the Valley of Little Meadow, the Strażyska Valley, Jaszczurówka, the Filipki Valley, Wierch Poroniec, Palenica Białczańska.

In the Park at the disposal of tourists there is a thick network of tourist trails with different degrees of difficulty, from very easy to very difficult and equipped with safety appliances such as chains, clamps and little ladders. A total length of 68 available hiking trails is about 275 kilometres. The most famous and at the

same time the most dangerous Tatra trail is “Orla Perć”. This trail leads through a long ridge across peaks and crags from the Zawrat Pass by Kozi Wierch, Granaty to the Krzyżne Pass.

At the Park tourist cycling is permitted, but only on available marked 6 bicycle trails:

- the “Droga pod Reglami” trail from “Murowanica” in the Bystra Valley to the Siwa Clearing in the Chochołowska Valley,
- at the Chochołowska Valley from the Siwa Polana clearing to the shelter on the Chochołowska Polana clearing,
- Kuźnice – the shelter on the Kalatówki Polana clearing,
- the Sucha Woda Valley – the shelter “Murowaniec” on the Hala Gąsienicowa mountain pasture,
- Małe Ciche – Zazadnia – Wierch Poroniec – Zgorzelisko – Tarasówka,
- Małe Ciche – Lichajówki – Murzasichle.

On the Park’s area there are conditions to surface and cave mountaineering. One can go in for the surface mountaineering to marked for this purpose areas of the Morskie Oko Lake, the Valley of Five Polish Lakes together with the Buczynowa Little Valley, the Hala Gąsienicowa mountain pasture, in the mouth of the Lejowa valley as well as in the Jaroniec couloir. There are 37 caves available for cave mountaineering. Marked tourist trails lead to 6 caves available for tourists. These caves are situated in the Kościeliska Valley: Mroźna (illuminated), Smocza Jama in the Kraków Ravine, Mylna, Raptawicka, Obłazkowa and a cave Dziura (Hole) in the Valley to Hole.

At the Park there is a cable railway completed in 1936, running all year from Kuźnice to Kasprowy Wierch. Currently, it is a modern cabin railway with panoramic panes providing a splendid view on the Tatra Mountains. In winter especially for skiers there are also two chair-lifts in a valley of Goryczkowa and Gąsienicowa.

TABLE X. CABLE RAILWAYS IN THE TATRA NATIONAL PARK

Specification	Name of the railway		
	“Kasprowy Wierch”	“Goryczkowa”	“Gąsienicowa”
Kind of the railway	cabin	chair	chair
Time of ride in min.	12	15	8
Length in m	4292	1624	1180
Elevation above the sea level in m:			
of lower station	1027	1355	1601
of upper station	1959	1958	1953
Difference of elevations in m	936	602	352
Average inclination in %	22	37	30

S o u r c e: website of the Polish Cable Railways www.pkl.pl.

There are marked trails for downhill skiers in the Sucha Stawiańska Valley (a pothole of Gąsienicowa) and in the Goryczkowa Valley as well as on the northern slope of Nosal. There were created also little ski fields on the Hala Gąsienicowa mountain pasture near “Betelemka”, on the Chochołowska Polana clearing, at Kalatówki and in the Suchy Couloir. A ski route leads from the Goryczkowa Valley to Kuźnice. In Kościelisko Kiry and in the area of the Middle Rafter there are marked trails for cross-country skiing.

In recent years more and more tourists traverse the Tatra trails on skis. Ski alpinism becomes popular as combination of traditional cross-country and downhill skis. In the Polish Tatra Mountains one can ski on marked tourist trails except for sections closed in the period from 1 December to 31 May. Moreover, there are marked ski trails in the area of Goryczkowa and Kondratowa Valleys as well as from the Hala Gąsienicowa mountain pasture and Nosal to Kuźnice and also in the Chochołowska Valley. At good snow conditions and lack of danger of avalanches one can also go in for alpine skiing.

On the Park’s area there are 8 tourist shelters, possessing jointly 648 bed places.

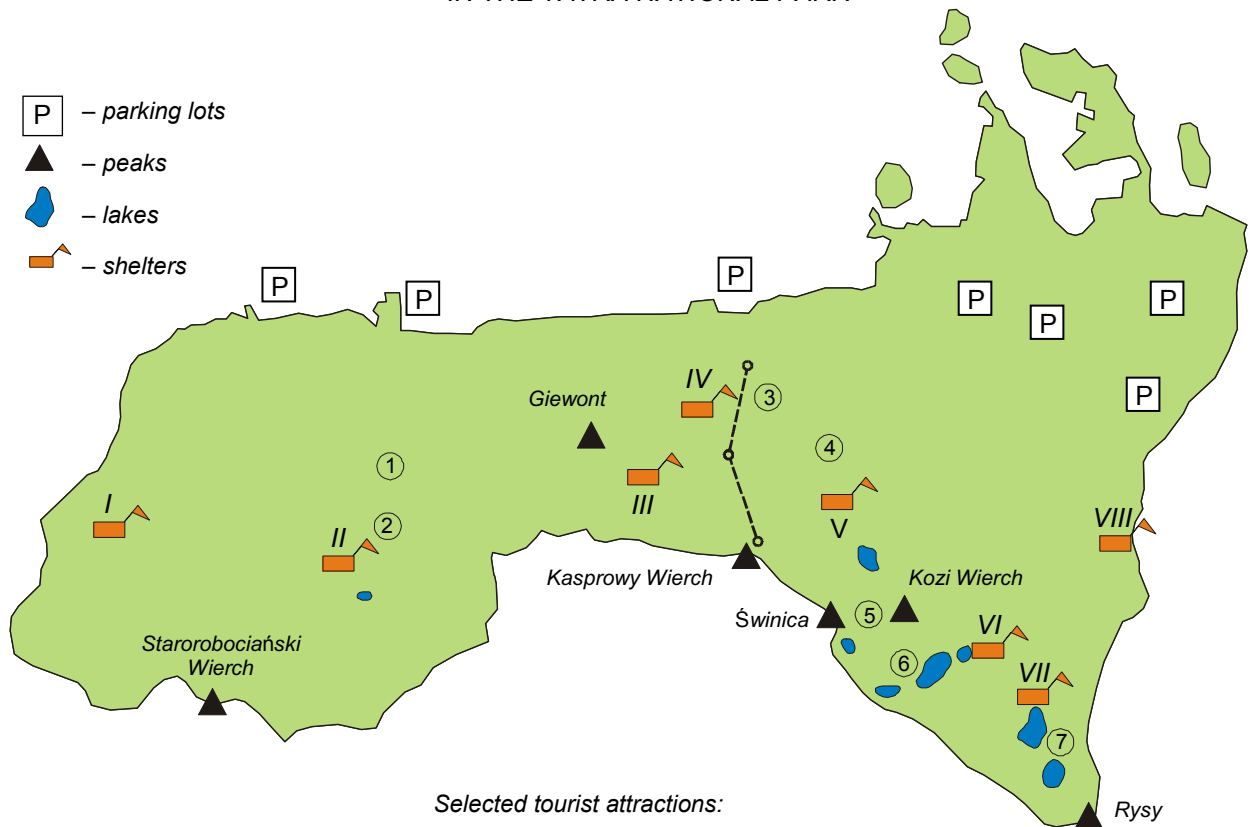
TABLE XI. SHELTERS IN THE TATRA NATIONAL PARK

Facilities (a sign on a scheme)	Bed places	Elevation above the sea level in m
Shelter on the Chochołowska Polana clearing (I)	133	1146
Shelter "Ornak" in the Kościeliska Valley (II)	80	1100
Shelter on the Hala Kondratowa mountain pasture (III)	20	1335
Shelter – hotel on Kalatówki (IV)	84	1198
Shelter "Murowaniec" on the Hala Gąsienicowa mountain pasture (V)	108	1505
Shelter in the Valley of Five Polish Lakes (VI)	71	1671
The St. Staszic Shelter by the Morskie Oko Lake (VII)	75 ^a	1405
Shelter in the Roztoka Valley (VIII)	77	1031

^a Of which 43 bed places in so-called Old Shelter.

S o u r c e: website <http://www.schronisko.ezakopane.pl/>

SCHEME OF DEPLOYMENT OF SELECTED TOURIST ATTRACTIONS
IN THE TATRA NATIONAL PARK



Selected tourist attractions:

- 1 – the Mroźna Cave
- 2 – the "Kraków" Ravine
- 3 – the cable railway on Kasprowy Wierch
- 4 – the Hala Gąsienicowa mountain pasture
- 5 – "Orla Perc"'
- 6 – the Valley of Five Polish Lakes
- 7 – the Morskie Oko Lake

N o t e. Roman numerals (I–VIII) stand for location of shelters, which are listed in table XI.