

Tomasz Dziezic
Magdalena Markiewicz
Szkoła Główna Turystyki i Rekreacji – Warszawa

ANOMALIES AND TRENDS IN THE SEASONAL VARIATIONS IN DEMAND AT POLISH HOTELS – SELECTED SEGMENTS IN 2000-2015

Summary

The article addresses quantitative, qualitative and structural changes at Polish hotels in 2000-2015. The general situation in the Polish hotel market is described by a number of supply- and demand-side indicators reflecting the scope and very significant dynamics of changes observed in the period under examination.

In this context, the Authors analyse in detail demand from the segments of domestic and foreign tourists by month (season) in the first six years of the period covered. The results show that between 2000 and 2005 each year witnessed a fall in domestic demand in the high summer season, whereas seasonal variations in demand were very similar. Therefore, the Authors conclude that it was a constant characteristic of the Polish hotel market in the years in question and that domestic demand was mostly driven by business travel. It was assessed as a sign of immaturity (weakness) of the market in the period covered.

An in-depth analysis of trends observed in the following years (until 2015) presented in subsequent parts of the article (with a special focus on 2015) demonstrates that growth in the market (on the demand and supply sides), in addition to qualitative and structural changes (proportions between high and low category establishments as well as demand for them), was accompanied by distinct functional and structural changes connected with the purposes of trips and stays at hotels and the related movements in financial flows.

Finally, the Authors make references to various macroeconomic and macro-social parameters, indicating a general increase in the wealth of the Polish population which – in their opinion – also contributed to changed tourist behaviour patterns with regard to accommodation choices. As a consequence, the years 2013-2015 saw fading seasonal anomalies and greater maturity of the Polish hotel market.

Key words: categories of establishments, hotel guests, hotel supply, hotel demand, seasonal variations in demand.

JEL codes: D12, O12, O18, O47, Z30, Z31, Z32

Introduction

For more than the past dozen years, the Polish hotel market has undergone major transformations. Those have been not only changes in the number of establishments but also qualitative changes and, which seems more important, structural changes¹. Due to a buoyant rise in the number of hotels, Poland's hotel resources rank among the most modern and non-decapitalised facilities in Europe – 60% of establishments are no more than 15 years old and offer standards satisfying the present-day market and safety requirements². Qualitative changes are reflected in an increasing shift from outdated proportions between categories, inherited by the Polish hotel industry from the period of the state-owned and centrally planned economy. They also comprise a widening range of services in conference, health and leisure tourism. The first two spheres are currently considered to be a canon indispensable to an economically viable hotel. Structural changes concern movements in proportions between specific categories of facilities in terms of supply (the number of hotels, rooms and beds) and on the demand side (the number of guests and overnight stays) as well as the differentiation of the demand with regard to variables such as: the country of permanent residence (Poland – abroad), seasonality and the types of stay (business – leisure).

As regards the subjects covered, the analysis presented in this article is limited to establishments classified by GUS (the Polish Central Statistical Office) as “hotels”. The limitation results from the importance of this type of facilities in the accommodation market, their share (and an increasing share) in services related to overall tourist traffic, revenue, share in the labour market, investment and fixed assets. As noted by A. Konieczna-Domańska: “The leading position of hotels arises from the functions which can be performed by hotels in serving tourists, in satisfying accommodation needs thanks to: extensive service activities ... universal locations ... a wide range of hotel standards” (Konieczna-Domańska 2007, p. 51; translator's version).

The assessment of the status and qualitative changes was based on the operating approach that the quality of services offered by hotels was closely related to the category of establishments and resulted from it. The Authors followed a general guideline by A. Panasiuk: “...that: the issue of quality in tourism ... should be analysed in two aspects, i.e. the quality of a service ... service quality ...” (Panasiuk 2007, p. 144; translator's version). Both aspects, at least in terms of official standard and probability, are reflected in the number of stars (categories) granted (and successively verified) to individual establishments.

¹ The article excludes the spatial aspect of hotel development and relevant changes. Bearing in mind its importance and links with the market, it was assessed that it was a set of issues involving an in-depth and separate study.

² The fact seems to be insufficiently emphasised in promotional communications, particularly abroad.

In the context of the presented data concerning the quantitative and qualitative parameters of the hotel market, the Authors analyse variables of seasonality and the breakdown into domestic and foreign guests and, based on the results, interpret possible structural changes regarding the nature of stay and the related sources of revenue for the hotel industry. In addition, the Authors seek to answer the following questions: do changes observed in the period covered suggest structural transformations? Is it possible to recognise certain trends? If yes, what are they? Can the varying seasonality of demand in the segments of domestic and foreign tourists (as well as of business and leisure traffic) contribute to more efficient use of resources? What are the main causative factors of the changes and trends observed?

On the basis of input data, the Authors put forward the hypothesis that, despite 10 years of transition, at the beginning of the period under analysis the Polish hotel market remained a small one, characterised by an outdated qualitative structure and very dependent on the segment of domestic business travel and foreign traffic (combined). Due to changes observed after 2000, in 2015 it seems to be much more mature, with a rising share of domestic leisure traffic. There are reasons to suppose that the needs of those visitors increasingly determine the range of accompanying services (in addition to the accommodation service)³.

The analysis conducted was solely based on data published by GUS. On account of the duration of the time series under examination, the availability, continuity, uniformity of collection rules and coherence of data from the source concerned, the above characteristics were regarded as both necessary and sufficient conditions for adopting that database as the basis for investigation.

Changes in the Polish hotel market – selected indicators

The general assumptions presented in the introduction suggest that the situation with regard to tourist accommodation services (including those provided by hotels) may be adequately exemplified by analysing them in the context of the structure of and values contained in the tourism satellite account. The first results of the TSA were published in 2003 on the basis of data from 2000. It was found that in the overall composition of the tourism consumption of tourism characteristic products the share of overnight stays was 30%, the highest figure among the products covered by the study (*Rachunek satelitarny turystyki...* 2003, p. 34)⁴. In the case of the tourism consumption of non-resident visitors – inbound tourism consumption (according to the UNWTO

³ The confirmation of this presumption requires separate analyses and investigations, beyond the scope of this article.

⁴ Tourism characteristic products – an analytical category used in the TSA. In 2000, apart from accommodation services, the product groups characterised by the highest shares in tourism consumption

terminology, *Glossary of Tourism Terms*, 2014, pp. 8 and 12), hotels, motels and boarding houses accounted for 15.2% of its value, slightly below expenditure on food- and beverage-serving services (16.8%) and on food products (15.9%) but more than spending on fuel and transport services – a total of 14.1%. It is worth adding that, according to estimates presented by the authors of the study, out of the revenue from the provision of accommodation services to non-residents in the amount of PLN 3.3 billion hotels, motels and boarding houses earned 88.3% (PLN 2.9 billion) (*Rachunek satelitarny turystyki...* 2003, p. 35). As regards Polish residents, the share of hotels⁵ in total consumption was 8%, whereas other tourist accommodation establishments represented 10%. In terms of value, the revenue of hotels was PLN 1.4 billion and other facilities received PLN 1.7 billion. It means that both categories of travellers spent a total of PLN 4.3 billion on hotels (as well as on motels and boarding houses). Furthermore, the authors of the TSA estimated the internal structure of the consumption of hotel services broken down by type of trip taken by residents: an amount of PLN 1.0 billion was expended on business travel (71.4% of the total value of consumption in the item of hotels) and ca. PLN 400 million on other short- and long-term domestic trips and on domestic parts of outbound trips (*Rachunek satelitarny turystyki...* 2003, pp. 40-41). The above proportions reflect the dominant role of business travel in creating demand for hotel services among Polish residents in the year in question.

According to the most recent TSA estimates, with data for 2012, the share of accommodation services in tourism consumption remained relatively high. As put by the authors of the study, “The most important item in the group of tourism characteristic products purchased by visitors (residents and non-residents combined) was spending on accommodation services (rendered by both hotels and other accommodation establishments...” (*Rachunek satelitarny turystyki...* 2015, p. 16; translator’s version). It represented 33.2%; for comparison, in 2012 the respective shares of food- and beverage-serving services and of all transport services were 23.1% and 20.4% (*ibidem*). At the same time, it accounted for 17% of total tourism consumption, with the estimated consumption of accommodation services by non-residents (11% of tourism consumption) at ca. PLN 3.6 billion and that of residents and other consumption components at PLN 5.2 billion (of which: residents’ consumption and other consumption components were PLN 3.4 billion and PLN 1.8 billion respectively⁶).

included food- and beverage-serving services (22%) as well as surface and air transport services (16%); source: as above.

⁵ With regard to the TSA data, the figures for hotels also comprise motels and boarding houses.

⁶ The Authors’ calculations based on data contained in the aforementioned study (*Rachunek satelitarny turystyki...* 2015, pp. 16-17). In 2012, the overall tourism consumption in Poland was estimated at PLN 55,482 million, of which “other components” represented approx. PLN 7.2 billion.

Comparing the total value of tourism consumption within the territory of Poland in 2000 when it was PLN 36.7 billion (*Rachunek satelitarny turystyki...* 2003, p. 32) with expenditure on hotel services of PLN 4.3 billion plus PLN 2.1 billion on other types of accommodation – a total of PLN 6.4 billion (*Rachunek satelitarny turystyki...* 2003, p. 33) – with the figures computed for 2012 when the total value of consumption was assessed at PLN 55.5 billion and the value of sold accommodation services at PLN 8.8 billion (*Rachunek Satelitarny Turystyki dla Polski 2012, 2015*, table 1, p. 37), it must be noted that in the period in question the total value of tourism consumption went up by 51.2%, whereas the value of sold accommodation services rose by 37.5%. Therefore, with the still high share of hotel services (and – more broadly – of accommodation services) in the general structure of tourism consumption, there was only a minor increase in value for non-residents (from PLN 3.4 billion to PLN 3.6 billion) but a much greater rise for residents and other components – from PLN 3.1 billion to PLN 5.2 billion (i.e. by 68%).

Apart from changes in the value parameters of tourism consumption, it must be remembered that the range of services offered by hotels evolved as well. Initially, the basic services provided by establishments located near the main traffic routes and in major cities were the accommodation service and the storage of luggage carried. Present-day guests are definitely more demanding, whereas their needs and expectations change very quickly. Managers of accommodation establishments must face and adapt to those changes if they wish to maintain and improve their competitive positions. The provision of hotel services – in accordance with the rules of hotel marketing – consists in the creation of a product appropriately combining tangible components (the establishment, equipment, advertising materials) and intangible ones (ambience, safety and security, giving information). The correct recognition of tourists' changing needs and increasing awareness of their "purchasing power" lead hotel managers to be oriented towards innovation (and improving competitiveness), thus towards launching by modern hotels a number of solutions convenient enough to attract more guests and significantly increase this market segment.

In the context of the general configuration of hotel (accommodation) services in the composition of services and goods purchased by tourists (whose presentation was attempted in the TSA results), the Authors selected a number of supply- and demand-side indicators illustrating aspects of the situation and developments in the hotel market which seem to be of key importance. In the case of supply, those include the number of hotels, hotel beds and rooms (only as quantitative indicators), references to a broader definition of hotel facilities (which allows to capture certain structural changes), the values of Integrated Territorial Hotel Indices (*Hotelowe Indeksy Terytorialne* – HIT), reflecting both quantitative and qualitative aspects, when the input parameter is the number

of hotels (HIT O⁷) or the number of beds (HIT M) in specific categories and a wider perspective of the European demographic index (D Index⁸). The values of selected indicators and their changes presented in Table 1 unambiguously demonstrate very dynamic growth in hotel supply. In addition, it must be emphasised that the values of the composite indices HIT O and HIT M increased to a (relatively) greater degree than purely quantitative indicators (which results from changes in the qualitative structure of establishments). As a confirmation of the above-mentioned changes, the “average HIT M” index exceeded the value of 3.00 points. Due to those developments, the value of the demographic index also went up by more than 150%. However, it involved no upward movement of Poland in the ranking of the European countries covered by the index in question as in 2000 and 2015 Poland ranked 37th and 38th respectively. It does not mean that the hotel network in Europe developed even more intensively; rather, the relevant gap between Poland and the vast majority of countries was so enormous that narrowing it did not yet result in changes in the ranking.

Table 1. Selected hotel supply indicators for Poland in 2000 and 2015

Supply-side indicator	Value		Change (in %)
	2000	2015	
Number of accommodation establishments*	7,818	7,337	-6.15
Number of hotel facilities**	1,449	3,723	156.9
Number of hotels	924	2,316	150.6
Number of rooms at hotels, thousand	50.4	117.45	133.0
Number of beds at hotels, thousand	95.1	235.6	147.7
HIT O	2,019	6,480.6	221.0
HIT M	242.5	733.8	202.6
average HIT O	2.19	2.80	27.9
average HIT M	2.55	3.14	23.1
D index for Europe	31	78	151.6
Rank in Europe in terms of value of the D index	37	38	-

*According to and on the basis of the GUS classification of accommodation establishments by type – collective accommodation establishments.

**In Poland, hotel facilities (according to GUS practice) comprise: hotels, motels, boarding houses and other hotel facilities.

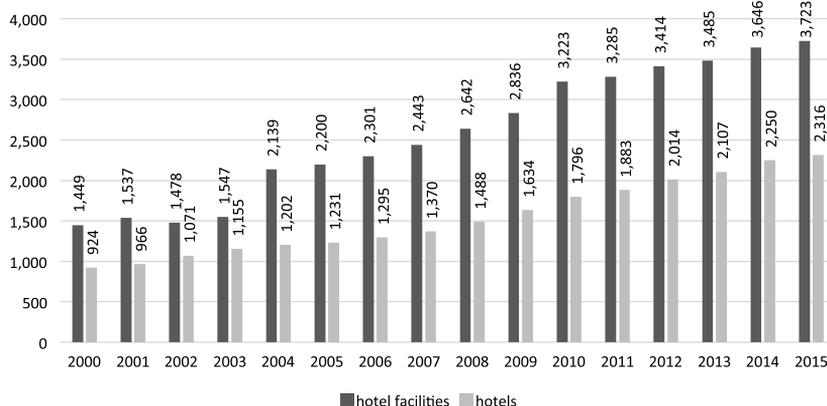
Source: the Authors’ own study based on the following: for the number of establishments, rooms and beds – *Turystyka GUS 2000* (2001) and *Turystyka GUS 2015* (2016); for the values of the HIT O and HIT M indices – own calculations (on the basis of the concept of the Integrated Territorial Hotel Index, Dziedzic 2004, pp. 25-32); for the D Index and the rank in Europe – own calculations on the basis of the UNWTO and Eurostat data.

⁷ The concept of the Integrated Territorial Hotel Index was presented in the form of a publication in *Problemy Turystyki* in 2004. As a follow-up to the concept, the HIT M, average HIT O and average HIT M indices were developed.

⁸ The measure is the number of beds in hotels and similar establishments per 10,000 inhabitants. It is frequently applied in the literature and hotel practice (cf. e.g. Merski, Witkowski 2004, pp. 10-12; Tulibacki, 2009, pp. 51-52).

The comparison of data on the changing number of hotels and all hotel facilities (i.e. also motels, boarding houses and other hotel facilities) unambiguously shows significant dynamics of both indicators (values for each year in the period 2000-2015 in Figure 1). In the years in question, the number of hotels went up by 1,392, i.e. by 150.6%. In the case of the number of all hotel facilities, the growth rate was 156.9% (i.e. 2,274 establishments). Interestingly, however, a rising number of hotels was not accompanied by an increase in the share of hotels in the group of hotel facilities, on the contrary – there was a slight decline: whereas in 2000 it was 64%, in 2015 it fell to 62%. As the scale of change in the number of boarding houses and motels was much lower it means a very buoyant growth in the resources of the so-called other hotel facilities⁹. On the other hand, the share of hotels in the whole group of collective accommodation facilities jumped from 11.8% in 2000 to 31.6% in 2015, i.e. by almost 20 pps. It must be assessed as a symptom of structural change in the supply of tourist accommodation establishments.

Figure 1. Number of hotels and hotel facilities combined in Poland, in 2000-2015



Source: own study based on: *Turystyka GUS* (Yearbooks from 2000 to 2015).

The demand-side indicators under analysis primarily include the number of guests, with a separate presentation of domestic and foreign tourists, and the number of overnight stays at hotels, hotel room capacity utilisation and 2 (composite) indices simultaneously taking account of the number of guests or overnight stays, the hotel category in which the service was supplied and hotel room capacity utilisation by category (on the basis of the assumptions and concept presented in: Dziedzic 2013, pp. 5-26). The values specified in Table 2 indicate that the numbers of guests and overnight stays rose more rapidly

⁹ The market segment in which establishments do not satisfy all the standard requirements or do not provide the range of services required from hotels remains outside mainstream analyses, constituting a field to be studied in the nearest future.

than that of hotels (and also those of rooms and beds in the establishments concerned), which resulted in a considerable increase in the room capacity utilisation rate. However, the dynamics of both composite indices must be particularly stressed as they demonstrate that rising demand primarily concerned establishments of higher categories.

Table 2. Selected indicators of hotel demand in Poland in 2000 and 2015

Demand-side indicator	Value		Change (in %)
	2000	2015	
Number of guests, thousand	6,386.9	17,487.1	173.8
of which: foreign tourists, thousand	2,400.3	4,707.65	96.1
Number of overnight stays, thousand	11,921.6	32,674.8	174.1
HIT Hkd'	7,422.7	28,396.1	282.6
HIT Hnd''	13,600.1	54,464.5	300.5
room capacity utilisation rate, %	40.6	48.3	7.7 pps (i.e. 19.0%)

Notes:

* The hotel demand index HIT Hkd – the value of the hotel demand index with the use of the parameter of the number of guests (cf. the study according to the indicated source).

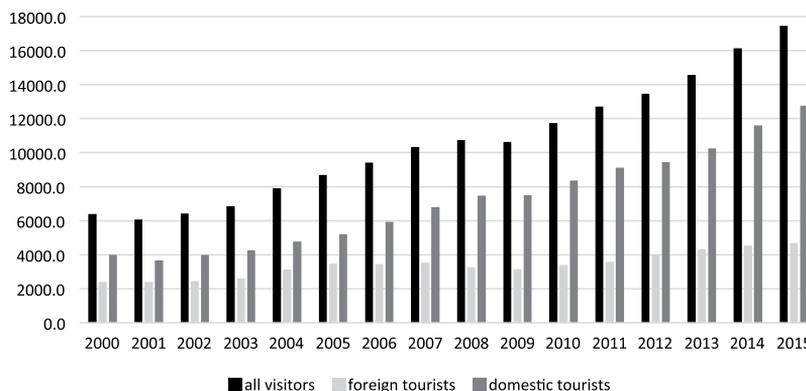
** The hotel demand index HIT Hnd – the value of the hotel demand index with the use of the parameter of the number of guests (cf. the study according to the indicated source).

Source: own study based on: *Turystyka GUS 2000* (2001) and *Turystyka GUS 2015* (2016). For the values of the HIT Hkd and HIT Hnd indices, own calculations based on source data contained in *Turystyka GUS* (Yearbooks from 2000 to 2015) and the assumptions and concept presented in: Dziedzic T. (2013, pp. 5-26).

Considering annual data from the whole period 2000-2015 with the group of foreign tourists separated, we may observe an upward trend on the one hand, although the dynamics for domestic tourists were much greater. On the other hand, in the case of foreign tourists, several periods (2000-2002 and 2007-2009) witnessed the susceptibility of this segment to global and/or pan-European developments (effects of the attack on the WTC, the global financial crisis, the eruption of the Icelandic volcano or events diminishing the attractiveness of tourism destinations, e.g. floods in Poland).

During the years under examination, the group of foreign tourists showed more frequent decreases and increases in their market share but over the period concerned the number of guests augmented by almost 100% (the values for specific years are presented in Figure 2).

Figure 2. Hotel guests in Poland (thousand) broken down into domestic and foreign tourists in 2000-2015



Source: as in Figure 1.

As assessed by A. Pastusiak and D. Szostak, the most important determinants of the development of the Polish hotel industry include the following: Poland's political and economic situation, the geographical and climatic location, the attractiveness of Poland and its regions, security as well as communication and transport, the wealth of the population and its tourism awareness, the development of domestic and international tourist traffic as well as business needs in terms of demand for hotel services (Pastusiak, Szostak 2009, pp. 118-128). The above-mentioned values concerning supply and demand in the Polish hotel market seem to fully confirm the aptness of this opinion, whereas economic growth having a direct effect on improving the living standards, the development of broader infrastructure (also of tourism infrastructure), supported by processes of European political and economic integration are directly reflected in the market in hotel services (a wider reference to those aspects is presented by the Authors in the final part of the article).

Seasonal anomalies of demand in 2000-2005 as a characteristic of a poorly developed market

In 2000-2005, interest in using hotel services rose along with growth in the number of establishments, as clearly indicated by the data presented in part 1 (Figures 1 and 2). The number of hotel guests in the period concerned – with the exception of the year 2001 (which saw a minor decline) – went up annually (in comparison with the previous year). The analysis of seasonal variations in demand was based on the examination of the share of domestic guests in the whole group of hotel guests in specific months for every year in the period

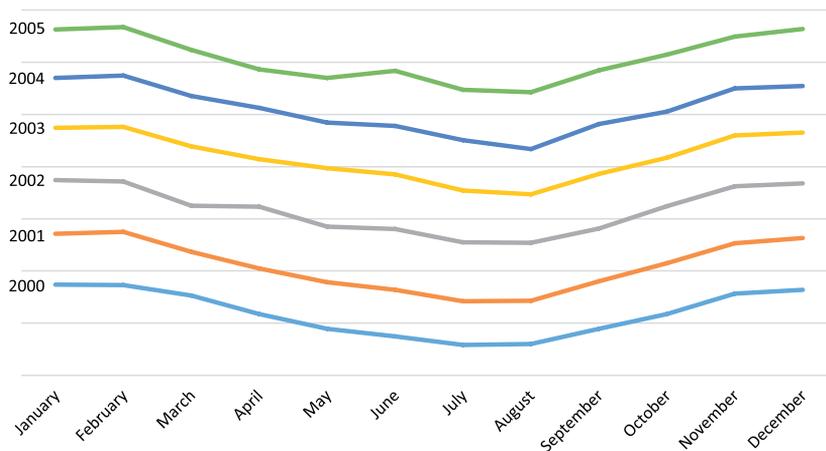
2000-2005. The above-mentioned structure in terms of percentage is presented in Table 3 and graphically in Figure 3.

Table 3. Share of domestic guests in the whole group of guests (in %) at Polish hotels by month in 2000-2005

Month	Year					
	2000	2001	2002	2003	2004	2005
January	74.9	74.2	74.9	74.9	73.9	72.5
February	74.6	75.0	74.4	75.3	74.8	73.4
March	70.6	67.4	65.0	67.9	67.0	64.7
April	63.5	61.0	64.6	62.8	62.5	57.3
May	57.9	55.7	57.0	59.4	56.9	54.0
June	55.0	52.8	56.2	57.0	55.7	56.7
July	51.6	48.4	51.1	50.9	50.1	49.5
August	52.1	48.6	50.8	49.3	46.7	48.5
September	57.9	56.1	56.2	57.2	56.2	57.0
October	63.6	63.0	64.8	63.3	61.0	62.9
November	71.3	70.6	72.4	71.9	69.9	69.8
December	72.7	72.7	73.6	73.1	70.9	72.7

Source: own study based on: *Turystyka GUS* (Yearbooks from 2000 to 2005).

Figure 3. Share of domestic guests in the whole group of guests (in %) at Polish hotels by month in 2000-2005



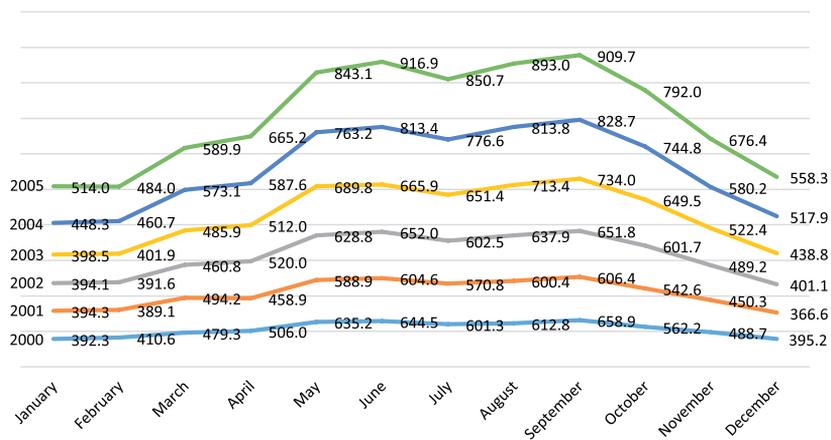
Note: The curves illustrating percentages are presented in Figure 3 in chronological order from 2000 (the lowest) to 2005 (the highest).

Source: own study based on: *Turystyka GUS* (Yearbooks from 2000 to 2005).

According to the analysed and presented data, in specific months of each year the share of domestic tourists showed a very similar seasonal pattern. In 2000 and 2002, hotels attracted relatively (in relation to all guests) the greatest interest from domestic tourists in January, whereas in the other years –

in February. Similarly, a marked domination of the segment of domestic guests materialised at the end of every year. In all the years covered, December was another month (ranked third) in which the share of domestic tourists was the highest. At the same time, in the period in question (2000-2005) relatively the least interest in hotels from domestic guests characterised the summer holiday months, i.e. June to August. In the Authors' opinion, it stemmed from two overlapping phenomena: a substantial rise in the number of foreign visitors to Poland in the summer period and a fall in the number of domestic guests in July and August. The decrease in absolute terms was abrupt enough not to compensate for increases in the segment of foreign tourists and the highest values of demand characterised months outside the summer holiday period, typically recognised in Europe as a high season for hotels. The data presented in Table 3 and Figure 3 suggest that in 2000-2001 the steepest fall was noted in July and in 2002-2005 – in August. The decrease must be attributed to the fact that in the period concerned (2000-2005) the vast majority of domestic hotel guests were business travellers, whereas such activities are markedly reduced in the summer holiday season. Figure 4 presents data on the total number of guests, characterised by a similar distribution pattern in successive years in the period covered, whereas an in-depth analysis of data for selected months and their variations throughout the period 2000-2015 is contained in part 3 of this article.

Figure 4. Number of guests at Polish hotels by month (thousand) in 2000-2005



Note: The curves showing the numbers of guests are presented in Figure 4 in chronological order from 2000 (the lowest) to 2005 (the highest).

Source: as in Figure 3.

The distributions presented in Figure 3 indicate a rather significant similarity of the shares of domestic tourists in the corresponding months of specific years. The differences between the minimum and maximum values for most months

did not exceed 4 pps, whereas the deviations from the 6-year average were around 2 pps. Greater turbulence concerns the months of March, April and May but even with the results obtained in 2005 it did not destroy the overall picture of the whole seasonal behaviour pattern of hotel guests in the years in question¹⁰. The maximum and minimum values, their range and average values for specific months in the period 2000-2005 are presented in Table 4.

Table 4. Minimum and maximum shares of domestic tourists in the total number of guests (by month, in %) at Polish hotels in 2000-2005 and differences in percentage points

Month	Minimum value (in %)	Year	Maximum value (in %)	Year	Difference between the maximum and minimum values (column 4 – column 2) (in pps)	Average value for 2000-2005 (in %)
1	2	3	4	5	6	7
January	72.5	2005	74.9	2000 2002 2003	2.4	74.2
February	73.4	2005	75.3	2003	1.9	74.6
March	64.7	2005	70.6	2000	5.9	67.1
April	57.3	2005	64.6	2002	7.3	61.9
May	54.0	2005	59.4	2003	5.4	56.8
June	52.8	2001	57.0	2003	4.2	55.6
July	48.4	2001	51.6	2000	3.2	50.3
August	46.7	2004	52.1	2000	5.4	49.3
September	56.1	2001	57.9	2000	1.8	56.8
October	61.0	2004	64.8	2002	3.8	63.1
November	69.8	2005	72.4	2002	2.6	71.0
December	70.9	2004	73.6	2002	2.7	72.6

Source: as in Table 3.

In most cases, the data computed and presented in Table 4 indicate similar seasonal behaviour of guests at Polish hotels, despite a substantial increase in demand. In the Authors' opinion, it is justified to find the period in question (2000-2005) homogeneous in terms of seasonal structure, both with regard to the total number of guests and in the breakdown into the segments of domestic and foreign tourists.

¹⁰ For a fuller explanation of greater differences, it is worth referring to the special characteristics of the calendar in specific years, taking account of the changing dates of Easter and patterns of the so-called long May and August weekends.

Trends and changes in 2000-2015

Changes in the selected supply- and demand-side indicators presented in the first part of the article unambiguously prove dynamic transformations of the Polish hotel market in the period covered. It also concerns changes in the qualitative structure by category of offering and using hotel services. It is reflected in the share of establishments and beds at hotels of the highest categories (5- and 4-star hotels) in relation to the lowest ones (2- and 1-star hotels) in overall supply and the total number of guests and overnight stays in both groups on the demand side. The composition also showed very significant changes. There was a more than threefold increase in the share of hotels of the highest categories, whereas that of 1- and 2-star hotels dropped by half. The structure of beds offered changed in similar proportions. In spite of 10 years (1989-1999) of functioning in market economy conditions, in the initial period covered by the analysis the qualitative structure diametrically differed from the situation in other European countries. It mainly resulted from the doctrinal assumptions of the authoritarian system and the centrally planned economy until 1989. It was then assumed that hotels were supposed to be accommodation facilities of marginal importance (as the main purpose of accommodation establishments was to ensure leisure to the so-called working people). As a rule, hotels of the highest categories were solely intended to render services to foreign tourists. The first period of transition (until 1999), despite an increase in the number of hotels (particularly in relative terms it was considerable growth, at a rate of 85%¹¹), saw no evident change in the quality (category) structure of services offered. The process did not seem to begin until 2000. Detailed data are contained in Table 5, whereas structural changes are shown in Figure 5 (the graphic presentation allows to illustrate more distinctly the scale of change).

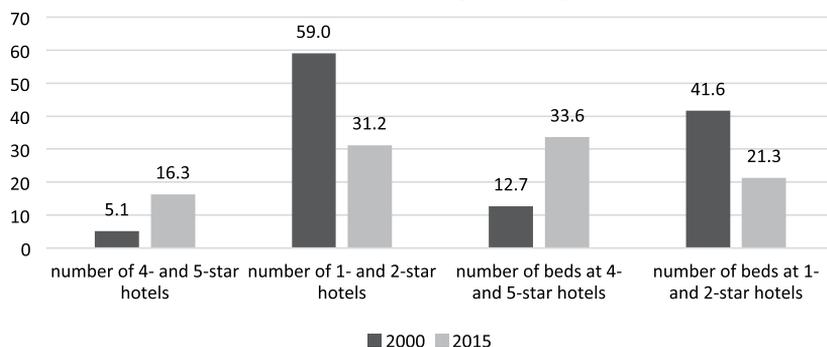
Table 5. Selected indicators of hotel supply in Poland in the highest and the lowest categories; comparison between 2000 and 2015

Supply-side indicator	Value		Share (in %)		Change (in pps) 2000-2015
	2000	2015	2000	2015	
number of 4- and 5-star hotels	47	378	5.1	16.3	11.2
number of 1- and 2-star hotels	545	723	59.0	31.2	-27.8
number of beds at 4- and 5-star hotels, thousand	12.1	79.1	12.7	33.6	20.9
number of beds at 1- and 2-star hotels, thousand	39.6	50.3	41.6	21.3	-20.3

Source: own study based on: *Turystyka GUS 2000* and *Turystyka GUS 2015*.

¹¹ On the basis of *Turystyka polska 1993* (1994, p. 17, table 11), based on GUS data. According to this source, in 1990 Poland had 499 hotels with 30,700 beds, of which merely 2 establishments were 5-star hotels.

Figure 5. Shares (%) of selected segments of hotel supply (the number of facilities) in 2000 and 2015 broken down into the lowest and the highest categories



Source: own study based on: *Turystyka GUS 2000* and *Turystyka GUS 2015*.

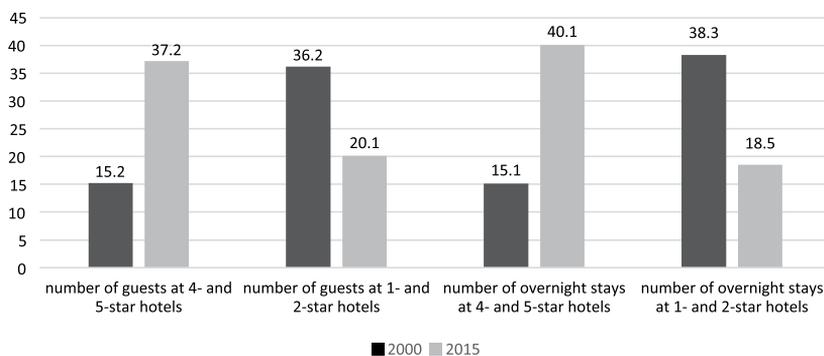
The data in Figure 5 explicitly show that in the period 2000-2015 the qualitative structure of the Polish hotel industry underwent far-reaching changes and that the supply side of the market concerned transformed fundamentally. Although in 2015 the share of low-category facilities remained relatively high (almost one-third of all hotels), the proportion of the number of beds at hotels of the highest categories was more than 12 pps higher than that of beds at 1- and 2-star hotels. One may say that even though the qualitative composition continued to differ from those observed in more developed hotel markets, the gap had narrowed significantly.

Considering the supply changes, natural questions arise whether such a serious structural change deteriorated the imbalance typical of the hotel market and whether the multiplied offer of services in the highest categories met tourists' expectations. The analysis of the selected demand-side indicators allows to state that changes on the demand side followed investors' decisions and changes in hotel facilities. The share of guests at hotels of the highest categories, in terms of both the number of guests and overnight stays, increased from approx. 15% in 2000 to 37-40% in 2015. At the same time, the value of the respective indicators for 1- and 2-star hotels dropped from 36-38% to 19-20%. It means the reversal of structural proportions and shows that tourists in their consumer choices adapted to the range of services offered by hotels and that investment decisions proved to be correct. It can be regarded as a sign of gradually increasing market maturity of the Polish hotel industry. Therefore, in the period covered, there were no phenomena confirming the concerns raised by certain market analysts and tourist traffic researchers that a major extension of "high-star" hotel facilities was the wrong development direction for the Polish hotel industry, whereas visitors to Poland primarily needed cheap and modest establishments adapted to their limited budgets. Data concerning structural changes in demand are presented in detail in Table 6 and graphically in Figure 6.

Table 6. Selected indicators of hotel demand in Poland in the highest and the lowest categories; comparison between 2000 and 2015

Demand-side indicator	Value (thousand)		Share (in %)		Change (in pps) 2000-2015
	2000	2015	2000	2015	
number of guests at 4- and 5-star hotels	970.7	6,504.15	15.2	37.2	22.0
number of guests at 1- and 2-star hotels	2,313.3	3,510.95	36.2	20.1	-16.1
number of overnight stays at 4- and 5-star hotels	1,804.1	13,105.65	15.1	40.1	25.0
number of overnight stays at 1- and 2-star hotels	4,571.9	6,037.7	38.3	18.5	-19.8

Source: as in Table 5.

Figure 6. Shares (%) of selected segments of hotel demand in 2000 and 2015 broken down into the lowest and the highest categories of facilities

Source: as in Figure 5.

The above data indicate that the demand side of the market also underwent processes deeply changing the qualitative composition of the tourism consumption of hotel services and in 2015 facilities of the highest categories were able to attract more than 6.5 million tourists.

Business tourism was considered to be a driver of demand for services offered by hotels of the highest categories in the early 2000s. Business travel, conferences, training or integration events and similar forms of corporate activities involving the use of hotels were indicated as the main sources generating interest in using the growing resources of hotel facilities, particularly of higher categories. The analysis performed and presented by the Authors by month (season) in the breakdown into domestic and foreign guests corroborated (on the basis of variations in monthly data) that domestic business tourism, i.e. stays at hotels paid for by employers, represented a very significant market segment. Without its share and related revenue for the industry, the financial standing of hotels would have been worse, just as conditions for making further hotel investments.

Foreign tourists must be deemed to be a segment of equal importance, not only to the hotel market but to the whole tourism industry and to the economy as well. The number of hotel guests from abroad not only went up (as presented in part 1), there was also a shift in the share of hotels in the structure of using various types of overnight stays. Whereas in 2000, out of 17,400,000 (*Turystyka Polska 2000 2001*, p. 11, Table 3) foreign visitors to Poland, 2,400,000 people stayed at hotels (*Turystyka GUS 2000 2001*, p. 13, Table I/4), accounting for 13.8%¹², in 2015 there were 4,708,000 hotel guests from abroad (*Turystyka GUS 2015 2016*, p. 192, Table II/2) and the total number of foreign tourists was estimated at 16,722,000 (*Charakterystyka przyjazdów cudzoziemców do Polski w 2015 roku 2016*, p. 1, Table 1), which means that 28.2% of them used hotel services (an increase in the shares by 14.4 pps). In the same period, the proportion of foreign nationals among all hotel guests declined from 37.6% in 2000 to 26.9% in 2015, i.e. by 10.7 pps (as presented in part 1). The above changes demonstrate that the use of hotels by foreign visitors to Poland was an increasingly frequent form of tourism consumption, which may suggest that services offered by Polish hotels to a greater extent satisfied the needs of guests from abroad. On the other hand, the demand relatively diminished in importance to the industry and domestic tourists became the main driver of growth in sales of hotel services, with their purchasing power and changes in tourism behaviour patterns.

Business tourism (using hotels) and inbound tourism have different cycles of demand by season. It was demonstrated in part 2, in the analysis of seasonal demand in the first years of the period in question (2000-2005). In order to answer the questions whether the market considerably evolved in this regard, whether the presented seasonal structure – characteristic of the early 2000s – remained a permanent attribute of the Polish market, the Authors followed changes in each of the successive years of the period 2000-2015, separating the segments of domestic and foreign guests and establishing the proportions between them in specific months.

On the basis of general knowledge on seasonal variations in hotel demand in Poland and on the two main segments of (domestic and foreign) guests, the Authors adopted the thesis that between June and July the number of domestic guests decreased and that of foreign visitors increased. It was also hypothetically assumed that between August and September the opposite phenomenon was observed. As demonstrated in part 2, it was corroborated by data for the first years of the period covered. Data from all the 16 times of measurement (2000-2015) essentially confirm this characteristic of market behaviour, with the

¹² The value of this indicator must be considered very low relative to what could be observed in other European markets. The reasons included not only very limited hotel resources but also a characteristic structure by direction (the composition of markets of origin) and purposes of trips. Relatively low-income tourists from Eastern Europe dominated in number, accompanied by a significant share of persons visiting family or friends and staying outside organised accommodation facilities.

exception of the last three years (2013-2015). Simultaneously, they allow to establish that between June and July as well as between August and September variations in demand from domestic guests were relatively (in per cent) and gradually ever less significant. In the Authors' opinion, it means that although demand created by broader domestic business tourism remained vital to that for hotel services as a key market component the summer holiday period revealed leisure as the purpose of trips taken by domestic hotel guests (which gained in importance over time). If this conclusion is assumed to be correct, it also means that there was a positive shift in the composition of sources of financing (travel expenses and receipts for hotels): from business to household budgets. The numbers of visitors staying in June and July as well as in August and September and variations in demand from foreign and domestic guests in the period 2000-2015 are presented in Tables 7 and 8.

Table 7. Number of visitors in June and July in 2000-2015 and changes between the months under analysis in specific years for domestic and foreign guests staying at Polish hotels

Year	Foreign visitors, thousand		Change for foreign guests		Domestic visitors, thousand		Change for domestic guests	
	June	July	thousand	%	June	July	thousand	%
2000	289.8	290.8	1.0	0.3	354.7	310.5	-44.2	-12.5
2001	285.5	294.5	9.0	3.2	319.1	276.3	-42.8	-13.4
2002	285.7	294.9	9.2	3.2	366.3	307.6	-58.7	-16.0
2003	286.4	320.0	33.6	11.7	379.5	331.4	-48.1	-12.7
2004	360.5	387.8	27.3	7.6	452.9	388.8	-64.1	-14.2
2005	397.3	429.4	32.1	8.1	519.6	421.3	-98.3	-18.9
2006	356.0	397.2	41.2	11.6	567.3	458.9	-108.4	-19.1
2007	371.2	394.8	23.6	6.4	634.4	531.3	-103.1	-16.3
2008	338.9	359.3	20.4	6.0	697.8	589.1	-108.7	-15.6
2009	322.3	365.4	43.1	13.4	676.2	621.3	-54.9	-8.1
2010	355.6	390.1	34.5	9.7	765.8	687.6	-78.2	-10.2
2011	377.1	412.5	35.4	9.4	865.3	757.7	-107.6	-12.4
2012*	403.7	465.2	61.5	15.2	743.4	817.6	74.2	10.0
2013	430.3	485.8	55.5	12.9	979.4	900.4	-79.0	-8.1
2014	456.4	495.9	39.5	8.7	1,088.4	997.4	-91.0	-8.4
2015	469.9	547.4	77.5	16.5	1,210.7	1,137.4	-73.3	-6.1

Source: own study based on: *Turystyka GUS* (Yearbooks from 2000 to 2015).

Table 8. Number of visitors in August and September in 2000-2015 and changes between the months under analysis in specific years for domestic and foreign guests staying at Polish hotels

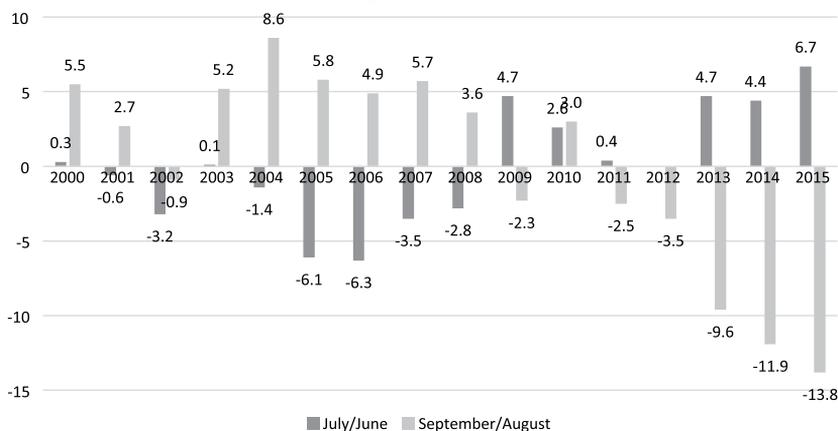
Year	Foreign visitors, thousand		Change for foreign guests		Domestic visitors, thousand		Change for domestic guests	
	August	September	thousand	%	August	September	thousand	%
2000	293.5	277.2	-16.3	-5.6	319.3	381.7	62.4	19.5
2001	308.9	266.2	-42.7	-13.8	291.5	340.2	48.7	16.7
2002	313.9	285.3	-28.6	-9.1	324.0	366.5	42.5	13.1
2003	361.6	314.5	-47.1	-13.0	351.8	419.5	67.7	19.2
2004	433.5	362.6	-70.9	-16.4	380.3	466.1	85.8	22.6
2005	460.2	391.4	-68.8	-15.0	432.8	518.3	85.5	19.8
2006	443.6	390.0	-53.6	-12.1	494.2	587.5	93.3	18.9
2007	408.9	387.7	-21.2	-5.2	548.4	656.5	108.1	19.7
2008	367.8	352.0	-15.8	-4.3	613.0	720.9	107.9	17.6
2009	383.2	344.3	-38.9	-10.2	664.7	742.8	78.1	11.7
2010	419.5	374.3	-45.2	-10.8	724.4	847.3	122.9	17.0
2011	434.6	399.9	-34.7	-8.0	817.4	911.2	93.8	11.5
2012	477.5	429.3	-48.2	-10.1	848.1	937.3	89.2	10.5
2013	520.5	451.5	-69.0	-13.3	947.6	989.3	41.7	4.4
2014	539.7	466.5	-73.2	-13.6	1,103.9	1,127.3	23.4	2.1
2015	553.9	476.7	-77.2	-13.9	1,223.5	1,225.5	2.0	0.2

Source: as in Table 7.

For a more precise illustration of relative variations (in per cent) in demand from domestic guests between June and July and between August and September, the arithmetic mean for both time series was calculated. In the first case (June-July), the annual average decrease was 12.8% (2012 was excluded from the comparison¹³, i.e. 15 measurements were taken into consideration). At the same time, the annual average increase in September relative to August was 14.0%. Both distributions for the period covered are presented in Figure 7.

¹³ In June and July 2012, Poland hosted the UEFA European Championship (in football). In the period concerned, the patterns of trips and stays at hotels were radically different and atypical in relation to other years of the period under examination (for the corresponding months). In 2012, domestic guests were approx. 120,000 fewer than a year before and almost 240,000 fewer than a year later. It indicates that a major share of domestic customers who usually stayed at hotels refrained from doing so at that time. It can be assumed that a significant role in this process was played by organisers of domestic business trips.

Figure 7. Deviation (in pps) from the average percentage value of change in the number of domestic guests in July relative to June and in September relative to August, in specific years of the period 2000-2015 (excluding July relative to June for 2012)



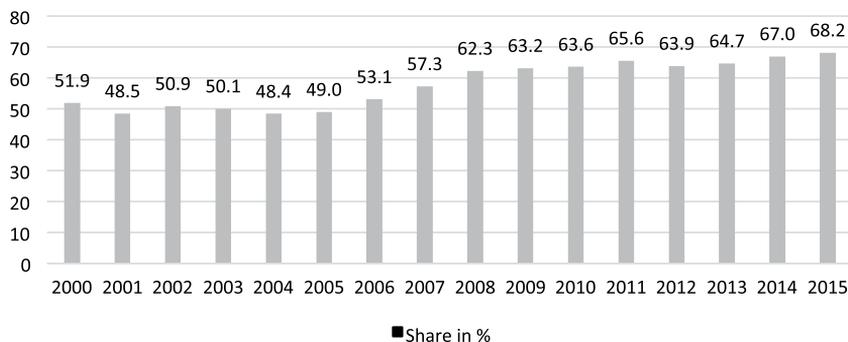
Source: as in Figure 1.

The values computed by the Authors and presented in Figure 7 rather distinctly indicate that the fall in demand from domestic guests between July and June narrowed in relative terms and from 2009 it remained below the multiannual average (the positive values in Figure 7 in the comparison of July to June results). At the same time, from 2011 the increase in demand noted in September against the previous month was definitely below the multiannual average (the positive values in Figure 7 in the comparison of September to August results). It suggests an emerging trend of diminishing relative influence of the segment of domestic business guests on total demand, despite continuing absolute decreases in the number of domestic guests in July and increases in September in all the years of the period in question. Considering a significant rise in the whole volume of domestic guests, it indicates a growing segment of holiday and leisure tourism where ever more visitors use hotel services. The data collected show that there was a market reversal in 2009-2011 which was, in a sense, a period of key importance to the structure of demand from domestic guests in 2000-2015. The analysis of data gathered in Tables 7 and 8 leads to the conclusion that, considering monthly aggregates, the summer holiday season for domestic demand is July and August as between the above-mentioned period and the neighbouring months (June, September) there are changes opposite to those observed in the preceding and following periods.

As shown in Tables 7 and 8, variations in demand from domestic guests were not only decreasingly important in relative terms (see: Figure 7) but we could also note clearly changing proportions between the segments of domestic and foreign tourists in the summer holiday period (July-August) and the degree of regress in the total number of hotel guests stemming from weakened domestic

business travel activities in the months concerned. On the basis of the data in Tables 7 and 8, the figures were aggregated for both summer holiday months and compared for domestic and foreign traffic in percentage terms. As regards the result obtained in the whole period 2000-2015, it must be recognised that the proportions changed rather considerably; there was a distinct upward trend of the share of domestic tourists (thus of the market power of that segment) in the summer holiday period. In the Authors' opinion, it is a situation reflecting gradually rising maturity of the Polish hotel market and fading anomalies observed in prior development stages, as in the case of supply-side structural changes (that the initial paragraphs of this part of the study attempted to demonstrate). The percentage of domestic guests in July and August in the total number of guests is presented in Figure 8.

Figure 8. Percentage of domestic guests in the total number of guests at Polish hotels in the months of July and August, in 2000-2015



Source: as in Figure 1.

In the period covered, the rise in the share of domestic guests in the total number of visitors by more than 16 pps must be considered to be an important change in the demand structure. It is also evident when we divide it into 3 sub-periods: 2000-2005, 2006-2010 and 2011-2015; the average values of the share in the first, second and third periods were 49.8%, 59.9% and 65.8% respectively. It means that the composition of demand (in the breakdown into domestic and foreign guests) changed much between the early 2000s when in the summer holiday period of certain years hotels had more foreign tourists and the last years of the period covered when two-thirds of summer holiday hotel guests were domestic customers. It is worth adding that the 5-percentage point increase in the shares of domestic tourists in 2007-2008 resulted from the financial and economic crisis which also affected foreign demand for services provided by Polish hotels¹⁴. However, it was compensated, with a minor surplus, by growing

¹⁴ Although in nominal terms the economic and financial crisis is dated from 2008-2009 its symptoms in the tourism market could be felt as early as 2007, whereas in 2009 the Polish market showed a certain

domestic demand. Simultaneously, the decline by 1.7 pps in the share of domestic tourists stemmed from the overall downturn in tourism and economic activity in Poland after mid-2012 and in early 2013. It was also reflected in shrinking charter traffic (cf. T. Dziedzic, 2014, p. 69, table 21).

In spite of the presented signs of change, throughout the period 2000-2011 the market continued to experience greater demand in the peak non-summer holiday periods (June and September) in relation to the summer holiday months. However, increased demand from foreign tourists and domestic leisure traffic did not compensate for declines due to weaker business travel, whereas July-August (to 2011) marked the demand “doldrums”. The values and differences in the total number of guests in the periods July-August in relation to the periods June and September are presented in Table 9 in absolute terms and in Figure 9 in relative terms.

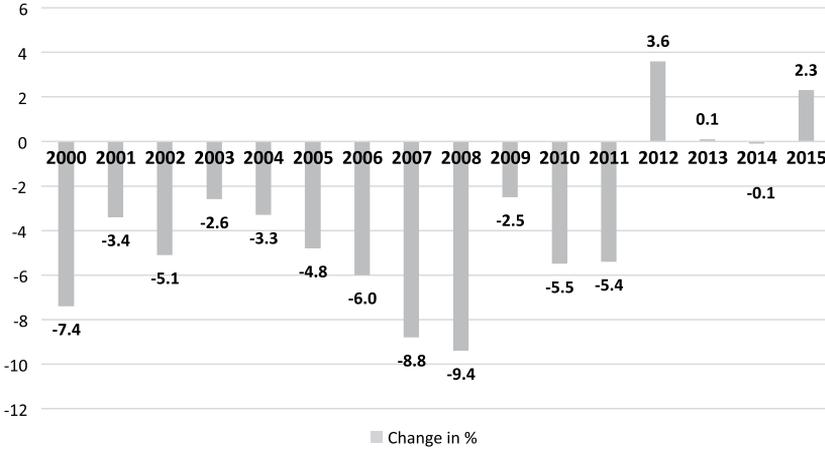
Table 9. Total number of guests at Polish hotels in 2000-2015 in selected months (in June and September as well as in July and August)

Year	Visitors, thousand		Difference thousand
	June and September	July and August	
2000	1,303.4	1,214.1	-89.3
2001	1,211.0	1,171.2	-39.8
2002	1,303.8	1,240.4	-63.4
2003	1,399.9	1,364.8	-35.1
2004	1,642.1	1,590.4	-51.7
2005	1,826.6	1,743.7	-82.9
2006	1,900.8	1,793.9	-106.9
2007	2,049.8	1,883.4	-166.4
2008	2,109.6	1,929.2	-180.4
2009	2,085.6	2,034.6	-51.0
2010	2,343.0	2,221.6	-121.4
2011	2,553.5	2,422.2	-131.3
2012	2,513.7	2,608.4	94.7
2013	2,850.5	2,854.3	3.8
2014	3,138.6	3,136.9	-1.7
2015	3,382.8	3,462.2	79.4

Source: as in Table 7.

recovery of interest from foreign guests. It was consistent with forecasts of some analysts that, faced with the crisis, many tourists (e.g. from Germany) would choose closer and cheaper holiday destinations, e.g. in Poland.

Figure 9. Percentage difference between the total number of guests in June and September and July-August; June and September were adopted as the reference points



Source: as in Figure 1.

Note: the result for 2012 was affected by the 2012 UEFA European Championship and should be treated as a unique and separate case.

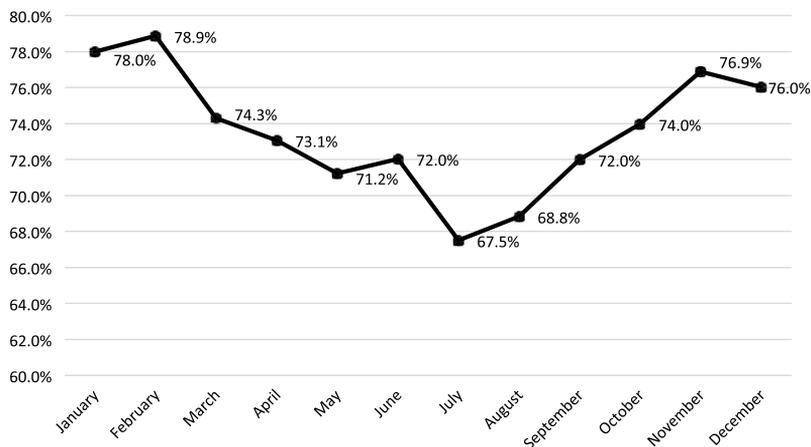
Changes in the total number of guests do not show such a clear trend as that observed for the domestic segment (see: Figures 7 and 8) as they are a product of processes concerning both diverse inbound tourism markets and Poland’s domestic demand, thus two very different groups of customers. In general, however, in 2013–2015 the seasonal decrease in demand was compensated for, there was even a surplus showing greater demand in the summer holiday period (and fading summer holiday “doldrums”).

Seasonal structure of demand in 2015

In 2015, hotel services were used by 17,487,100 persons, with domestic tourists accounting for 73.1%. With regard to that year, as for 2000–2005, the Authors analysed monthly variations in demand for hotel services. Considering the shares of domestic and foreign guests in the total number of visitors, there was still basically no interest from foreign nationals in staying at Polish hotels in the months January–April and October–December. In the case of shares of domestic guests, 2015 continued to witness a difference of over 11 pps between February as the month characterised by the highest share (78.9%) and July – the month with the lowest share (67.5%) but it was much narrower than in 2000 (23.0 pps), whereas the proportion of Polish tourists in July was significantly greater (by 15.9 pps – 2015 to 2000), which indicates considerable structural changes in demand. The above-mentioned changes, showing reduced seasonal

imbalance in the hotel industry, must be assessed as favourable. The percentages of domestic tourists in the total number of guests staying at Polish hotels in specific months of 2015 are presented in Figure 10.

Figure 10. Percentage of domestic guests in the total number of guests staying at Polish hotels by month in 2015



Source: own study based on: *Turystyka GUS 2015*.

When comparing the monthly values indicated for 2015 in Figure 10 to the average values for the years 2000–2005, major changes can be observed in the seasonal structure of demand, reflecting its increased maturity and adaptation to typical developments in the European market where hotels attract the greatest interest during the summer holiday period. Differences in the share of domestic tourists in specific months between 2015 and the average value for the period 2000–2005 (see: Table 4) are presented in Table 10.

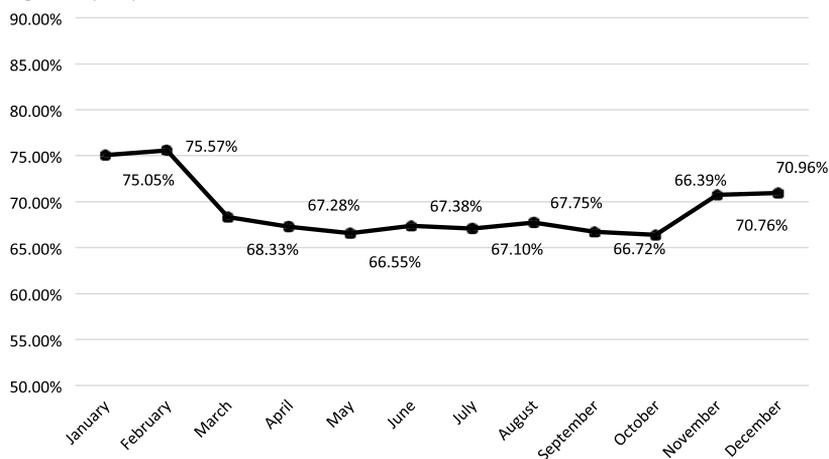
For a fuller illustration of the developments under analysis, the Authors also took account of the parameter of the number of overnight stays. The monthly distribution in 2015 shows basically no differences from the distribution of the shares for the number of guests. It averts the suspicion that although domestic tourists stay at hotels in the period July–August much more often but their stays are shorter and the volume of sales is not as favourable as the number of guests would suggest. In the light of the analysis, the concern appears to be groundless (cf. Figure 11).

Table 10. Share of domestic tourists by month in the total number of guests in 2015 and the average value of the indicator for the period 2000-2005 in %; difference in pps

Month	Share in % in 2015	Average value in % for the years 2000-2005	Difference in pps (column 2 - column 3)
1	2	3	4
January	78.0	74.2	3.8
February	78.9	74.6	4.3
March	74.3	67.1	7.2
April	73.1	61.9	11.2
May	71.2	56.8	14.4
June	72.0	55.6	16.4
July	67.5	50.3	17.2
August	68.8	49.3	19.5
September	72.0	56.8	15.2
October	74.0	63.1	10.9
November	76.9	71.0	5.9
December	76.0	72.6	3.4

Source: own study based on: *Turystyka GUS* (Yearbooks from 2000 to 2005 and 2015).

Figure 11. Share (in %) of overnight stays of domestic tourists in the total number of overnight stays by month in 2015



Source: own study based on: *Turystyka GUS 2015*.

In 2015, the shares of overnight stays of domestic tourists indicate essential consistency with the distribution of shares of the number of guests in the same months of the year concerned. It suggests that not only the parameter of the number of domestic guests in the period from May to September (with a special focus on July and August) but also that of the number of overnight stays was distinctly greater in 2015 than in 2000-2005. The phenomenon is also reflected

in the structure of revenue, thus in the financial performance of the Polish hotel industry.

An attempt to explain and assess the phenomenon

With regard to domestic demand whose scale and growth rate were much greater than in the case of that from foreign tourists, it seems that the reasons must be sought primarily in the overall rise in the wealth and incomes of the Polish population and enterprises¹⁵. It meant increased consumption possibilities and more favourable conditions for initiating and disseminating tourism behaviour more oriented towards the use of hotel facilities. The analysis of a number of economic indicators clearly shows that the period in question saw major changes. It concerned, *inter alia*, growth in GDP and GDP *per capita* (up by 161.0% and 162.3%), domestic demand (by 165.9%), the average monthly wages in the corporate sector (by 102.7%), private consumption (by 160.8%), average disposable household income (by 139.0%) and total corporate revenue from business activities (by 164.7%). The indicators of changes in the economic situation of the Polish population and economy selected by the Authors in the period covered are presented in Table 11.

It can be added that the share of expenditure on hotels and restaurants as estimated by GUS (within private consumption) increased from 3% in 1999 to 3.3% in 2014, i.e. from PLN 11.7 billion to PLN 33.6 billion¹⁶. The changes observed in the period covered were accompanied by a minimal fall in the number of Poland's inhabitants (by 0.5%)¹⁷, therefore it is possible to exclude this aspect from the assessment of changes and to consider that the indicators concern the same population, in terms of size, at the beginning and at the end of the period under examination.

Domestic demand for hotel services, measured by the number of guests, went up by more than 220% (as presented in part 1). The dynamics significantly exceeded the relative growth rates of the selected socio-economic indicators specified in Table 11. Presumably, rising hotel supply resulted in various marketing activities, also in reduced prices (or in a fall in prices in relation to increasing personal and business incomes and changes in prices of other products and services)¹⁸, which resulted in greater economic availability of hotel

¹⁵ The Authors refer here to growth in sales and turnover, increased corporate budgets rather than to entity, industry or sectoral profitability.

¹⁶ Source: GUS as indicated in the list for Table 11 for the item of "private consumption".

¹⁷ In 2000 and 2015, Poland's population was 38,644,000 and 38,455,000 persons respectively. As in: *Mały rocznik statystyczny GUS 2001*, p. 110, table 2(64) and *Mały rocznik statystyczny GUS 2016*, p. 100, table 3(65).

¹⁸ The issues of price changes in the Polish hotel market in the past several years and of the income and price elasticity of demand for hotel products (including conference products) represent separate fields of study. The Authors refer to no specific results as it would go beyond the subject of this article.

services offered. Promotional (including advertising) measures concerning new facilities, premises, services and packages offered at special prices were increasingly present in marketing activities of hotels in the last years of the period covered. In addition to the increased wealth of individual consumers and businesses, they were also conducive to the perception of hotel services as more available and belonging to the consumption standard for a widening group of customers. Those factors combined made a leisure stay at a hotel acceptable financially and mentally or even desirable in terms of reputation (models in reference groups) to a much larger group of Polish tourists¹⁹.

Table 11. Selected socio-economic indicators for Poland in 2000 and 2015 and changes in the period in question

Indicator	2000	2015	change		p. and table for	
			in volume	in %	2001	2016
Salaries, wages and other earnings from paid employment (in PLN billion*)	276.2	545.7	269.5	97.6	158/ 1(99)	141/ 1(95)
Gross operating surplus of employers and self-employed persons (except agriculture) (in PLN billion*)	130	280.2	150.2	115.5	as above	as above
Operating surplus – self-employed farmers (in PLN billion*)	14.2	34.2	20	140.8	as above	as above
Gross average monthly wage in the corporate sector (in PLN)	1,924	3,900	1,976	102.7	163/ 2(100)	146/ 3(97)
Private consumption (in PLN billion*)	390.5	1,018.6	628.1	160.8	175/ 10(108)	159/ 13(107)
Average household income per person, available, (in PLN*)	560	1,340	780	139.3	180/ 12(110)	164/ 15(109)
Average household income per person, disposable, (in PLN*)	541	1,293	752	139.0	as above	as above
Average household expenditure per person (in PLN*)	550	1,079	529	96.2	182/ 13(111)	165/ 16(110)
Total revenue of enterprises (in PLN billion)	952.5	2,520.9	1,568.4	164.7	373/ 1(239)	339/ 1(239)
Revenue of enterprises less finance income (in PLN billion)	887.8	2,485.9	1,598.1	180.0	as above	as above
GDP, (in PLN billion)	685.6	1,789.7	1,104.1	161.0	439/ 4(271)	395-6/ 4(276)
of which: gross value added (in PLN billion)	601.5	1,587.9	986.4	164.0	as above	as above
GDP per capita (in PLN)	17,742	46,540	28,798	162.3	as above	as above
Total domestic demand (current prices), (in PLN billion) (* for 1999)	654.2	1,739.7	1,085.5	165.9	444/ 6(273)	400/ 6(278)
of which: consumption (in PLN billion) (* for 1999)	491.95	1,372.8	880.85	179.1	as above	as above

Note: data in the items marked with an asterisk (*) concern 1999 and 2014.

Source: *Mały rocznik statystyczny GUS 2001* (2001) and *Mały rocznik statystyczny GUS 2016* (2016); detailed references (p. and table no.) to specific items are indicated in Table 11.

¹⁹ There are certain analogies here with the evolution of the availability of passenger air transport services (not only due to operations of low-cost airlines).

In the case of foreign tourists staying at hotels, characterised by a much less significant scale and dynamics of change (a 96.1% increase in the number of guests in the period 2000-2015; see: part 1), it must be pointed out that the growth rate for the summer holiday period (July-August) was 88%, that for June – 62%, for September – 72% (see: Tables 7 and 8) and for the whole period June-September – 78%. It means that, outside the high season (from January to May and from October to December of each year²⁰), demand augmented much more dynamically and in 2015 there were 112.8%²¹ guests from abroad more than in 2000. A more buoyant rise in the off-season period (by almost 35 pps) shows that marketing activities of hotels, regional authorities and the Polish Tourist Organisation (POT) targeted at foreign tourists and aimed at better bed capacity utilisation outside the high season brought measurable results and improved hotel performance indicators. It must be emphasised here the above-mentioned activities had changed staying at a hotel during a visit to Poland from a very rarely used service to one purchased by almost 30% of foreign tourists in Poland (as mentioned before). It can be considered to be a result of changes in the image of Polish hotel services and their availability among foreign tourists, without establishing here to what degree it was determined by changes in marketing activities (e.g. more flexible pricing), quantitative and qualitative changes in supply, organisational and technological changes in reservation and sales systems, changes in access to products (via the Internet and mobile Internet), changes in Poland's image, changes in directions of demand flows, changes in competitive markets, etc. Due to all those factors combined, hotel services in Poland significantly gained in importance to this group of tourists.

Conclusions

In the light of comparable data from the Tourism Satellite Account prepared for Poland, it is possible to establish that the share of expenditure on hotel services in the total value of tourism consumption within the territory of Poland remains relatively high, therefore the hotel industry continues to be economically important in the group of tourism characteristic products.

The data gathered and presented in the article indicate that in the years 2000-2015 the Polish hotel market underwent very distinct transformations, quantitative, qualitative and structural in nature and relatively deep.

On the supply side, it concerned a substantial rise in the overall volume in terms of the number of facilities and beds (rooms) – but more importantly – major changes in the qualitative structure. If we take into consideration the

²⁰ It does not concern mountain areas where seasonal variations are different for obvious reasons.

²¹ Calculations based on data contained in Tables 7 and 8 compared with data from part 1, with regard to the total number of guests from abroad.

growth in the room capacity utilisation rate, it must be assessed that the changes concerned corresponded to increasing and also evolving needs of tourists. Furthermore, the dynamics of all the main indicators of demand for hotel services were also very strong in the period 2000-2015.

However, we can speak of seasonal characteristics of that demand, reflected in seasonal anomalies in the form of shrinking domestic demand in the period of the greatest tourist traffic i.e. in the summer holiday months. Such a situation was very evident in the first years of the period covered (2000-2005) and prevailed – although steadily faded – until 2011. In the Authors' opinion, the reasons included the relative strength of business trips/stays and weak leisure tourism involving overnight stays at hotels. It reflects a weakness and immaturity of the Polish market in hotel services in the years in question.

Over time, demand created by broader domestic business tourism remained vital to that for hotel services as a key market component but the summer holiday period revealed leisure as the purpose of trips taken by domestic hotel guests (which gradually gained in importance). As a consequence, it must be assumed that there was a positive shift in the composition of sources of industry financing (travel expenses and receipts for hotels): from business to household budgets.

Therefore, we can speak of an emerging trend of diminishing relative influence of the segment of domestic business guests on total demand, despite continuing absolute decreases in the number of domestic guests in July and increases in September in all the years of the period in question. Considering a significant rise in the whole volume of domestic guests, it indicates a growing segment of holiday and leisure tourism where ever more visitors used hotel services. Throughout the period 2000-2015, there was a clear upward trend of the share of domestic tourists (thus of the market power of that segment) in the summer holiday period (July and August). The Authors regard it as a situation reflecting gradually increasing maturity of the Polish hotel market and fading anomalies observed in prior development stages.

A substantial rise in the shares of the domestic segment of hotel guests in July and August shows diminishing seasonal imbalance in the industry (a decline in the percentage of non-utilised rooms) and must be evaluated as a positive phenomenon. It can be assumed that, apart from factors resulting from increased wealth of the population and household income, an important role was played by promotional measures concerning new establishments/premises, services and packages offered at special prices, increasingly present in marketing activities of hotels in the last years of the period covered. They favoured perceiving hotel services as more available and belonging to the consumption standard for a widening group of customers. Owing to the interplay of those factors, a leisure stay at a hotel became acceptable financially and mentally, and frequently advisable in terms of reputation (as a desirable model) to an ever-larger group of Polish tourists.

When considering seasonal anomalies of demand, it must be also noted that there was more robust growth in demand from foreign tourists in the period outside the high season. It suggests that marketing activities of hotels, regional authorities and the Polish Tourist Organisation (POT) targeted at foreign markets (aimed to promote visiting Poland outside the high season) brought measurable results, improving the operating performance indicators of hotels. A significant increase in the percentage of foreign tourists who stayed at hotels in Poland is related to a change in the image of Polish hotel services and their availability to foreign nationals; hotel services in Poland significantly gained in importance to this group of tourists.

In the light of the data gathered, the analysis thereof and the conclusions presented by the Authors in the Introduction, the hypothesis – that at the beginning of the period covered the Polish hotel market remained a small one, characterised by an outdated qualitative structure and very dependent on the segment of domestic business travel and foreign traffic (combined), whereas the changes observed in the period 2000-2015 made it much more mature in 2015, with an increasing significance of domestic leisure traffic – was corroborated.

Bibliography

- Charakterystyka przyjazdów cudzoziemców do Polski w 2015 roku* (2016), MSiT study, <http://ms.gov.pl>. [access: 20.10.2016].
- Dziedzic T. (2004) *Metody tworzenia syntetycznego wskaźnika segmentowej podaży turystycznej. Hotelowy Indeks Terytorialny*, „Problemy Turystyki”, No. 1-2, Vol. XXVII.
- Dziedzic T. (2013), *Ilościowo-jakościowa ocena popytu na rynku hotelowym: propozycja nowego wskaźnika*, „Problemy Turystyki i Rekreacji”, No. 1.
- Dziedzic T. (2014), *Rynek lotniczy 2014*, SGTiR, Warszawa.
- Konieczna-Domańska A. (2007), *Gospodarka turystyczna, zagadnienia wybrane*, Kanon, Warszawa.
- Mały rocznik statystyczny GUS 2001* (2001), GUS, Warszawa.
- Mały rocznik statystyczny GUS 2016* (2016), GUS, Warszawa.
- Panasiuk A. (2007), *Ekonomia turystyki*, Wydawnictwo Naukowe PWN, Warszawa.
- Pastusiak A., Szostak D. (2009), *Hotelarstwo – usługi – eksploatacja – zarządzanie*, Wydawnictwo Naukowe PWN, Warszawa.
- Rachunek satelitarny turystyki dla Polski 2000* (2003), Ed. E. Dziedzic, Instytut Turystyki, Warszawa.
- Rachunek satelitarny turystyki dla Polski 2012* (2015), Ed. E. Dziedzic, Instytut Turystyki, Warszawa.
- Turystyka GUS, statistical yearbooks for the years 2000-2015* (2001-2016), GUS, Warszawa.

Turystyka Polska 1993 (1994), UKFiT, Warszawa.

Turystyka Polska 2000 (2001), POT, Warszawa.

UNWTO Glossary of Tourism Terms (2014), <http://unwto.org> [access: 02.2014].

Anomalie i trendy w sezonowych wahaniami popytu w polskich hotelach – wybrane segmenty z lat 2000–2015

Streszczenie

W artykule omówiono ilościowe i jakościowe zmiany strukturalne w polskich hotelach w latach 2000–2015. Ogólną sytuację na polskim rynku hotelarskim opisać można licznymi wskaźnikami popytu i podaży odzwierciedlającymi zakres i bardzo znaczącą dynamikę zmian zaobserwowaną w badanym okresie.

W tym kontekście autorzy szczegółowo analizują popyt w segmentach turystów krajowych i zagranicznych w podziale na miesiące (sezony) w pierwszych sześciu latach okresu badań. Wyniki pokazują, że w latach 2000–2005 każdego roku odnotowano spadek krajowego popytu w sezonie letnim, podczas gdy sezonowe wahania popytu pozostały bardzo zbliżone. Autorzy doszli do wniosku, że była to stała charakterystyka polskiego rynku hotelarskiego w badanym okresie i że krajowy popyt napędzany był głównie podróżami służbowymi. Uznano to za znak niedojrzałości (słabości) rynku w badanym okresie.

Szczegółowa analiza trendów zaobserwowanych w późniejszych latach (do 2015 roku) przedstawionych w dalszej części artykułu (koncentrującym się szczególnie na roku 2015) ukazuje, że rozwojowi na rynku (ze strony popytu i podaży) oraz zmianom jakościowym i strukturalnym (proporcjom między placówkami wysokiej i niskiej kategorii, jak i popytowi na nie) towarzyszyły wyraźne funkcjonalne i strukturalne zmiany połączone z celami podróży i pobytu w hotelach oraz powiązane z nimi przepływy środków finansowych.

Na końcu autorzy odnoszą się do różnych makroekonomicznych i makrospołecznych parametrów, wskazując na ogólne wzbogacenie się Polaków, co – ich zdaniem – również przyczyniło się do zmian wzorców zachowań turystów w kontekście wyboru zakwaterowania. Konsekwencją tego były zanikające w latach 2013–2015 anomalie sezonowe i większa dojrzałość polskiego rynku hotelarskiego.

Słowa kluczowe: kategorie placówek, goście hotelowi, podaż hotelowa, popyt hotelowy, sezonowe wahania popytu.

Kody JEL: D12, O12, O18, O47, Z30, Z31, Z32

Artykuł nadesłany do redakcji w lipcu 2017 roku.

© All rights reserved

Afiliacja:

dr Tomasz Dziejdzic

mgr Magdalena Markiewicz

Szkoła Główna Turystyki i Rekreacji

Wydział Turystyki i Rekreacji

ul. Stokłosa 3

02-787 Warszawa

e-mail: t.dziejdzic@intur.com.pl

e-mail: m.markiewicz@vistula.edu.pl