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THE CHANGES IN THE FUNCTIONING OF THE ACCOMMODATION OFFER IN WROCLAW IN THE TRANSFORMATION PERIOD

1. Introduction

The period of political, social and economic changes embraces both changes in the material substance of accommodation and legal changes connected with the functioning of hotel objects. At this time there appears the most important document regulating the market of tourist services in Poland – the first act in the post-war Poland, issued on 29 August, 1997. This is the first document of this rank which, in a complex way, describes the way of functioning of different enterprises on the tourist service market.

According to the first article, the above-quoted Act establishes the conditions of offering, by both local and international businessmen, tourist services on the territory of Poland and abroad, if the contract with the client is signed on the Polish territory [*Journal of Laws* 1997, No. 133, item 884].

Different chapters regulate the legal situation of tour-operators, intermediaries and tourist agents, tourist guides, establishes the conditions of the legal protection of clients and, finally, regulates the market of accommodation services.

Article 36 of the Act specifies the terminology formerly employed by GUS (Central Statistical Office) with reference to the accommodation offer and proposes the following types of accommodation objects:

1. Hotel – an object with at least 10 rooms, where most of the places are in single and double rooms, offering a wide range of services for the staying clients,
2. Motel – a hotel at a road, offering car service with a parking at the disposal of the motorized guests,
3. Guest house – an object with at least 7 rooms, providing clients with full board,

4. Camping site – an attended object, providing accommodation in tents, caravans, facilities for preparing meals, parking the cars and other services needed by clients. Such an object can also, additionally, provide accommodation in tourist houses or similar objects,

5. Tour house – an object with a number of beds no lower than 30, adapted to self-service and catering for the minimum of tourists' needs,

6. Youth hostel – an object for individual or collective young people's tourism, adapted to self-service,

7. Shelter – an object localized outside the town, mainly on tourist routes, providing the minimum of tourist service,

8. Camp site – unattended object for tents (*Journal of Laws* – hereafter *JL* – 2004, No. 223, item 2268).

Article 37 of the Act establishes the categories, in which the objects are classified:

1. For hotel, motel and boarding house – five categories marked with stars,

2. For camping – four categories marked with stars,

3. For tour house and youth hostel – three categories marked with Roman numbers (*JL* 2004, No. 223, item 2268).

The quoted Act was repeatedly amended (*JL* 1997, No. 133, item 884; *JL* 1998, No. 158, item 1043; *JL* 1998, No. 113, item 714; *JL* 1999, No. 40, item 401; *JL* 2000, No. 43, item 486 and No. 122, item 1314; *JL* 2004, No. 62, item 576); nevertheless, the definitions remained unchanged, with the exception of camping site and its categorization.

The categorization of the objects providing accommodation was specified four times. One of the most important acts which deals with the subject is the ordinance of the Minister of Economy of 13 July, 2001 (*JL* 2002, No. 66, item 665 and No. 142, item 1190) and the ordinance of the Minister of Economy and Labor of 19 August, 2004 (*JL* 2004, No. 188, item 1945).

The documents quoted above and their further amendments play an important role in the legal process of accommodation development in Poland, which – in some way – influences the character of the accommodation and its changes in Wrocław in the examined period.

2. Accommodation in Wrocław during the research period

Between 1975–1990 – the period before the economic and political changes the dynamics of changes in the number of accommodation objects was rather slow. Within 15 years, the number increased from 16 to 23 objects. Within the frame of this number, the number of hotels remains practically unchanged. At the beginning and at the end of this period the number is the same – 9 hotels. The exception here was the year 1978, when statistics show 14 hotels. During

the 1980s the number of 8 objects predominated. This situation is presented in Table 1.

Table 1. Accommodation units in Wrocław in the years 1975–1990

Year	Total	Hotels	Places	Seasonal places
1975	16	9	4179	1743
1976	16	9	4502	1669
1977	16	9	5159	1683
1978	19	14	5272	2786
1979	16	9	5079	2069
1980	19	9	5888	2266
1981	23	8	6090	1914
1982	20	8	5292	1851
1983	19	8	5052	1856
1984	19	8	5160	1841
1985	19	8	5259	1855
1986	19	8	5160	1839
1987	20	8	5376	1890
1988	20	8	5463	1908
1989	20	8	5069	1916
1990	23	9	4397	2017

Source: GUS statistics

The period of transformations, starting in the decade of the 1990s brought about a considerable change in the number of accommodation units in Wrocław.

Table 2. Number of accommodation units in Wrocław in selected years

Objects/year	1985	1990	1991	1995	1996	1997	1998	1999	2000	2001	2002	2003
Total	23	23	32	47	44	49	49	52	49	61	63	62
Hotels	8	9	9	16	19	22	24	25	27	32	36	37
Motels	1	1	1	1	1	1	1	1	1	1	1	1
Tour houses	4	5	5	5	5	4	4	3	1	1	1	1
Youth hostels	2	2	2	2	2	2	2	2	3	3	3	3
Camping sites	2	2	2	3	3	2	2	2	2	2	2	2
Guest rooms	4	3	3	1	1	1	–	–	–	–	–	–
Others	2	1	9	19	13	17	16	19	17	18	18	18

Source: GUS statistics for Wrocław, selected years

The total number of the accommodation units in the given period has almost tripled – from 23 in 1985 and 1990 to 62 in the year 2003 (Table 2). Additionally, periods of a sudden increase in the numbers of units can be distinguished: in the first five years of the 1990s and at the beginning of the 21st century.

The most important dynamics of the growth within the frame of all types of units occurred with reference to the hotels, whose number, almost unchanged between 1975–1989, rose by nearly five times in the years 1990–2003 – from 8 to 37. The biggest increase occurred in the period 1998–2003, when 13 new hotels appeared in the city.

In the case of motels – during the whole research period the situation did not change. In Wrocław, there is just one motel – Motel Orbis. It shows the scale of demand for this type of accommodation offer in the city.

The number of tour houses in Wrocław also changed: from merely a few units – 5 of the type in 1990 to 3 at the end of last decade of the 21st century.

Youth hostels throughout the period showed the constant number – two units. The situation changed in the year 2002, when another unit, Tumski Hotel, was opened. That brought about a change in the number of places of this type in Wrocław from 157 to 191 beds. The location of the new hostel is also worth mentioning – relatively close to the city center – contrary to the tradition of localizing such accommodation units in the suburbs.

The offer of camping is, for Wrocław, of rather lesser importance, the number of facilities, with the exception of the years 1995–1996, all the time being – two. The worst situation, it appears, is found with relation to camp sites since, practically, such an offer does not occur, with the exception of the year 1991 – when one camp site functioned with 200 places opened seasonally during the summer.

Another, important accommodation offer in the city, the second according to the number of units, following the hotels, are the so-called “other units”, unclassified in any of the previously-mentioned types. Their number has increased nine times, but in the absolute number it is just from 2 to 18 units. The most important period for this type of accommodation were the years 1990–1995, when the number rose from 1 up to 19! The next years were characterized by increases or decreases till the year 2003, with the number establishing at 18 units.

A detailed analysis of the period 1995–2003 (Table 3), with reference to the hotels, shows the biggest growth in this type of accommodation offered in Wrocław in the categories of two and four stars, a four-time increase in the number (from 2 to 9) occurring for the lower category and from 2 to 8 for four-star hotels. The year 2005 brought about another change within the frame of the higher category – two of the units changed their category from 4 to 5 stars, and, in this way Wrocław getting the hotel offer with highest possible category. The changes are also observed in the category of one-star hotels, whose number doubled, and three-star hotels – their number increased by about 50%.

Table 3. Hotels in Wrocław – the number with the division into categories

Year/category	Total number	****	***	**	*
1995	16	2	10	2	2
1996	19	2	13	3	1
1997	22	3	14	4	1
1998	24	3	14	3	4
1999	25	3	13	2	7
2000	27	5	14	5	3
2002	36	7	15	9	5
2003	37	8	15	9	5

Source: GUS statistics

It is only the group categorized with four stars that shows a constant increase. The other categories show, in the given period, increases and decreases in their number, which is especially evident in the case of one-star hotels: from just one unit in the years 1996 and 1997 to seven units in year 1999 and again – a drop to three units a year later and another growth to five units in the year 2001.

With reference to the number of beds in the hotels (Table 4) – in the last part of the research period, an important increase was witnessed from the total number of around 3,000 to more than 5,000 beds. The biggest dynamics of the presented growth is recorded in the case of the four- and one-star hotels. In the case of the former, the constant growth by about 300% is observed and in the case of the latter – the capacity, at the beginning of the period, increased from 33 to 531 beds, followed by a decrease to about 300 places at the end of the examined period. The almost constant number of beds is characteristic of three-star hotels and two-star hotels doubled the number of beds. In both cases, in 1999, a decrease in the number of beds was observed due to the legal changes being introduced in the categorization and also due to the reconstruction of some units.

Table 4. Number of beds in hotels according to categories

Selected years/category	Number of beds	****	***	**	*
1997	3121	710	1685	693	33
1999	2911	704	1199	477	531
2000	3574	1271	1420	527	356
2002	5091	2003	1618	1169	301
2003	5385	2311	1620	1162	292

Source: GUS statistics

It is worth mentioning that more than 40% of the total number of beds in Wrocław's hotels are those in four- and five-star hotels, while the offer of one-star hotels is of lesser importance.

3. The hotel offer in Wrocław

The offer of hotels in Wrocław depends on the category requirements of each unit and also on the tourist function of the city ascribed to each strategy of the town development. Wrocław, as an important touring center of an international level, aspires to the title of a European conference and congress center and also a venue of business activity. These two ways of tourist offer of the city development – leading in the research period – have influenced the development of the accommodation units offer of the city, presenting the current shape.

According to the Annex to the Instruction issued by the Minister of Economy (Annex No. 1 to the Instruction of Minister of Economy and Labor of 19 August, 2000. *JL* No. 188, item 1945) – the hotels of the category of four or five stars should provide, among others: a multifunctional group of halls suitable for the character of the object: *i.e.* ready to cater for such needs as organizing conferences, enjoying club activities, or participating in training courses. These categories should also put at client's disposal an offer of biological renovation – at least two of the following: a swimming pool, sauna, solarium, massage center and other recreational service.

The four- and five-star hotels (Table 5) in Wrocław have at their disposal a total of 45 conference halls and 6 meeting-rooms. What is more, for the needs of congresses and conferences, almost each hotel puts at their clients' disposal a professional business center with a complex of services like: copying, typing, faxing, correspondence editing and translating center. Such centers also offer a computer service with the Internet access.

An important item of each business-directed offer are elements of relax and recreation: fitness centers, sunas, Jacuzzi or massage service. A standard offer in these categories are rooms with facilities for invalid persons and separate zones for smokers and non-smoking guests.

Apart from regular accommodation, the hotels propose a special offer – a kind of package with accommodation as the most important, but not the only asset.

As an example, let us mention the offer of "Holiday Inn", called: "Sunny Wrocław with culture". The package includes:

- a stay for two persons in the comfort superior room,
- breakfast for two persons – a buffet type,
- relaxing time in the sauna,

Table 5. An offer of four- and five-star units in Wrocław

Hotel	Rooms	Confer- ence halls	Supplementary offer
"Holiday Inn"	146	7	Business center, fitness center
Art Hotel	77	4	Room for working, concert hall
Dwór Polski	25	1	4 restaurants
"HP Park Plaza"	177	4	<ul style="list-style-type: none"> - underground attended parking place with 75 places - individual safe at the reception - laundry - free access to newspapers - reservation of city tours, cultural events, plane tickets, etc. - taxi service - rent a car, auto assistance - casino - Casinos Poland
Qubus Hotel Maria Magdalena	83	2	<ul style="list-style-type: none"> - business center - 170 titles of newspaper from all over the world - hotel safe - ironing and laundry service - attended parking - banquet organization
Guesthouse Jana Pawła II	60	4	<ul style="list-style-type: none"> - parking - underground parkplace - hairdresser - sauna - chapel
Radisson SAS Hotel	162	2 halls, 6 rooms	<ul style="list-style-type: none"> - fitness center - business center
Sofitel Wrocław	205	10	<ul style="list-style-type: none"> - jacuzzi - sauna - hydromassage - fitness room - solarium - business center - underground parking
"Wrocław" hotel Orbis	292	9	<ul style="list-style-type: none"> - business center - tourist information - laundry - ironing - shoes cleaning service - swimming pool - recreation center - attended parking - safe at the reception
"Best Western Hotel Prima"	79	2	Fitness Club, parking

Source: own elaboration

- a bottle of wine,
- two tickets for a selected cultural event in the city.

Three-star hotels in Wrocław offer an infrastructure tailored to meet the needs of conferences, congresses and business tourism development. Fourteen of the units in this category (Table 6) offer a total of 40 conference halls, 3 meeting halls and one training course room. A smaller number of objects provides a possibility of relaxing and recreation in fitness centers, saunas or at swimming pools. Such an offer refers to five of the 15 hotels. Rarely is information about zones for smokers and non-smokers included ("Europejski" Hotel) or that about rooms and apartments suitable for invalid clients ("Wodnik" Hotel).

Table 6. Offers of three-star hotels in Wrocław

Hotel	Rooms	Conference halls	Supplementary offer
Hotel "Bielany"	33	2	Attended and unattended parking
Bugatti Hotel	20	1	Parking for cars and coaches
Hotel Campanile	110	4	Parking
Hotel "Europejski"	65	1	TV room, luggage lockers, laundry, a stand with souvenirs, 24 h exchange office, parking lot
Hotel "Gem"	58	6	Swimming pool, tennis hall, tennis-courts, football pitch, sauna, solarium, massage center, jacuzzi, attended parking for cars and coaches, bike rental
"Mercure Panorama"	150	12	Tourist information, laundry, ironing, shoe cleaning machines, deposit lockers at the reception
Hotel Orbita	25	1	Fitness studio (sauna, solarium), during the winter season – ice rink, in the summer season – swimming pools
Hotel "Patio"	50	2	–
Hotel "Polonia"	145	2	Parking
Hotel Tumski	57	2	–
Hotel "Wodnik"	–	1 and a training course room	Billiards, sauna, free parking, hotel bus for 6 persons, rent a canoe
Hotel Zaulek	12	1	–
Novotel Orbis	145	3 and a meeting room	Tourist information, laundry, ironing, shoe cleaning facility, swimming pool, parking lot: attended and unattended, a garden
Hotel Olimpia	20	2	Attended parking lot

Source: own elaboration

The offer of two-star hotels (Table 7) in Wrocław is designed for congress and business tourism to a lower degree than in the case of higher standard hotels. It is understandable that a different type of tourist, one who is more interested in a cultural and touring offer of the city focuses the attention on such a category of accommodation. This is the reason for the relatively low number of congress facilities in this type of units. Two star-hotels offer a total of 9 conference halls, one meeting-room in four of the nine objects of this category in Wrocław.

Out of the total number of hotels in Wrocław, 28 offer such facilities as conference halls.

Table 7. An offer of two-star hotels in Wrocław

Hotel	Rooms	Conference halls	Supplementary offer
Europeum	17	2	–
Burza	–	–	A garden, attended parking – 24 h with 100 places and for 10 coaches, auto assistance
Saigon	57	–	–
Wieniawa	268 beds	1 hall and a meeting room	Beautician's and hairdresser's salon
WKS Śląsk	97	3	Parking, exchange office
Motel Orbis	76	–	Tourist information, shoe cleaning facility, attended parking, safe at the reception

Source: own elaboration

4. The structure of location of the accommodation units in Wrocław – present state

Table 8 presents a specification of accommodation units in Wrocław and their location and the distance from the tourist, historical and administrative center of the city – the town hall.

The above review of the addresses of the accommodation units points to two of Wrocław streets, with the highest concentration of such units. At Kiełbaśnicza Street, located at the distance of less than some hundred meters from the city center, there are four objects situated within the distance of about 400 meters. These are: Art Hotel, Dwór Polski, "Best Western Prima" and "Patio" (2x****, 2x***). The other street is Józefa Piłsudskiego Street, which has three hotels placed within the distance of less than 500 meters. These are: "Polonia", "Europejski" and "Holiday Inn" hotels (1x****, 2x***), and the touring house "Piaśt".

Table 8. Location of the accommodation units in Wrocław

Accommodation Unit	Address	District	Distance from the center in km
Hotel "Holiday Inn" ****	ul. Marsz. J. Piłsudskiego 49/57	Stare Miasto	1
Hotel Radisson Sas *****	ul. Purkyniego 10	Śródmieście	0.8
Art Hotel ****	ul. Kiełbaśnicza 20	Stare Miasto	0.2
Dwór Polski ****	ul. Kiełbaśnicza 2	Stare Miasto	0.04
"HP Park Plaza" ****	ul. Drobnera 11-13	Śródmieście	1
Qubus hotel Wrocław ****	ul. Św. Marii Magdaleny 2	Stare Miasto	0.2
Pensjonat Jana Pawła II ****	ul. św. Idziego 2	Śródmieście	1.1
Sofitel Wrocław *****	ul. Św. Mikołaja 67	Stare Miasto	0.2
"Wrocław" Hotel Orbis ****	ul. Powstańców Śląskich 7	Krzyki	1.8
"Best Western Hotel Prima" ***	ul. Kiełbaśnicza 16-19	Stare Miasto	0.45
Hotel "Bielany" ***	ul. Klecińska 3	Krzyki	8
Bugatti Hotel ***	ul. Kosmonautów 328	Fabryczna	11.5
Hotel Campanile ***	ul. Władysława Jagiełły 7	Śródmieście	0.9
Hotel "Europejski" ***	ul. Piłsudskiego 88	Stare Miasto	1
Hotel "GEM" ***	ul. Baudouina de Courtenay 16	Śródmieście	3.2
Hotel "Mercure Panorama" ***	pl. Dominikański 1	Stare Miasto	0.5
Hotel "Orbita" ***	ul. Wejherowska 2	Fabryczna	3.6
Hotel "Patio" ***	ul. Kiełbaśnicza 24-25	Stare Miasto	0.45
Hotel "Polonia" ***	ul. Piłsudskiego 66	Stare Miasto	1
Hotel Tumski ***	Wyspa Słodowa 10	Śródmieście	0.9
Hotel "Wodnik" ***	ul. Na Grobli 28	Krzyki	2.2
Hotel "Zaułek" ***	ul. Garbary 11	Stare Miasto	0.5
"Novotel" Hotel Orbis ***	ul. Wyścigowa 35	Krzyki	4.8
"Olimpia" ***	al. Paderewskiego 35	Śródmieście	4.6
Europeum **	ul. Kazimierza Wielkiego 27a	Stare Miasto	0.5
Hotel "Burza" **	ul. Wilcza 33	Krzyki	4
Hotel "Sajgon" **	ul. Wita Stwosza 22/23	Stare Miasto	0.4
Hotel "Wieniawa" **	ul. Gajowicka 130	Krzyki	2.8
Hotel WKS Śląsk **	ul. Oporowska 62	Krzyki	2.7
Motel Hotel Orbis **	ul. Lotnicza 151	Fabryczna	6.7
Hotel Bacero *	ul. Oltaszyńska 107	Krzyki	6
Hotel "Irys" *	ul. Irysowa 1	Psie Pole	5.2
Hotel "Jasek" *	ul. Sułowska 39	Psie Pole	7.4
Agro Hotel	ul. Zwycięska 12	Krzyki	6
Hotel "Podkowa" *	ul. Wojszycka 8	Krzyki	4.7

Table 8. contd.

Accommodation Unit	Address	District	Distance from the center in km
Hotel Ośrodka Szkolenia Państwowej Inspekcji Pracy	ul. M. Kopernika 5	Śródmieście	3.6
Hotel Ośrodka Szkoleniowego "CS Szkolenie i Doradztwo"	ul. Boczna 12	Krzyki	2
Hotel "Piramida"	ul. Mulicka 11	Psie Pole	7.2
Hotel "Podróżnik"	ul. Sucha 1-11	Krzyki	1.5
Hotel "Relax"	ul. Bystrzycka 22	Fabryczna	3.7
Hotel "Savoy"	pl. Kościuszki 19	Stare Miasto	0.8
Hotel "Tenis"	ul. Krępicka 33	Fabryczna	12.7
Hotel "U Sermierzy"	ul. Krasińskiego 30b	Krzyki	1
Hotel Wakacyjny "Dizzy Daisy"	ul. M. Reja 54/56	Śródmieście	1.8
"Straszny Dwór"	pl. Grunwaldzki 61	Śródmieście	2.1
"Nad Fosą"	ul. Podwale 27	Stare Miasto	1
Apartament Wrocław	ul. Kozia 3 (Maślice)	Fabryczna	10
Apartament - Mini Hotel	ul. Zelenaya 15	Psie Pole	3.6
Apartamenty	ul. Oltaszyńska 24	Krzyki	5
Bursa Nauczycielska	ul. Kotlarska 42	Stare Miasto	0.3
Dom Gościnny "Brochów"	ul. Koreańska 1	Krzyki	7.3
Dom Wypoczynkowy "Piast"	ul. Piłsudskiego 98	Stare Miasto	1
Dom Nauczyciela	ul. Nauczycielska 2	Śródmieście	1.8
Dom Lekarza. Pokoje Gościnne	ul. K. Wielkiego 45	Stare Miasto	0.5
Międzynarodowe Schronisko Młodzieżowe PTSM	Wyspa Słodowa 10	Śródmieście	0.9
Szkolne Schronisko Młodzieżowe	ul. Kołłątaja 20	Stare Miasto	1
Szkolne Schronisko Młodzieżowe	ul. Kielczowska 43	Psie Pole	7.6
Camping AWS-AZS	al. I. Paderewskiego 35	Śródmieście	4.6
Camping "Ślęza"	ul. Na Grobli 16-18	Krzyki	2.2

Source: own elaboration

Another conclusion concerns the concentration of accommodation units within a distance of less than 500 meters from the city center. There are 11 hotels and two different accommodation units which are located accordingly. These are as follows:

- Sofitel Wrocław *****,
- Hotel "Holiday Inn" ****,
- Art Hotel ****,

- Dwór Polski ****,
- Qubus hotel Wrocław ****,
- "Best Western Hotel Prima" ***,
- Hotel "Mercure Panorama" **,
- Hotel "Patio"****,
- Hotel "Zaulek" ***,
- Europeum**,
- Hotel "Saigon" **

and:

- "Bursa Nauczycielska" house,
- "Doctor's house".

Five of the hotels belong to the highest category in Wrocław – five- and four-star, which makes 42% of the total number of the units of this category. The next four hotels (33% of the total number of this category in the city) are the units of three-star category and two of two-star category. In total, 34.4% of all the hotels in Wrocław are situated within the distance of 500 meters as the maximum from the Town Hall, which, in most tourist guides, is considered the city center.

Within the distance of 1 km from the center there are 26 accommodation objects, which makes 42% of the total number of such objects. In this group, there are almost all five- and four-star hotels, with the exception of hotel "Wrocław", situated 2 km from the center, eight three-star hotels, which makes 53% of the total number of the units in this category, three of the nine two-star hotels (33%), none of the one-star hotels and eight accommodation units classified in the types like: tourist house, youth hostel and other accommodation objects.

Two of the three youth hostels with their localization at a relatively short distance from the center are also worth mentioning. This type of accommodation units, catering for the low budget tourist, are usually situated in the suburbs of the city due to the lower maintenance costs. But in the case of Wrocław, two of these units are within the distance of 900 and 1000 meters from the center.

Location at the given distance from the center reflects the category of the object. The average distance from the city center for five- and four-star hotels is 700 meters. In the case of three-star hotels the distance amounts to almost 3 km, two-star hotels – 2.5 km, and the average distance from the city center in the case of one-star hotels is almost 6 km. The significant rise in the average distance for three-star hotels is due to the distant location of two of the 15 objects: 8 and 11.5 km from the center. Excluding these two objects, the average medium does not exceed 2 km. The average distance for all the hotels is about 3 km.

The present situation differs considerably from that in the period before the research. It is worth mentioning that there followed a significant change

in the number of hotels – from 8 to 37. Their location also was different. In the center there was no hotel and the closest – “Panorama” – was within the distance of 200 meters from the Town Hall, “Monopol” – (closed at present) – 400 meters. The other four hotels were located within the distance of 1 km and two others – 5 km.

The state of the accommodation units in Wrocław is relatively good. The city has at its disposal hotels offering all-year-round services, well equipped, especially those of higher standard, which gives a fair possibility of developing tourism – one of the most important elements of any city development. That is why development of congress, conference and business accommodation offer is stressed. Such an approach should bring about more effective development of Wrocław as an important congress center in this part of Europe.

At the same time, the accommodation offer in the economic class, designed for lower budget clients, is still insufficient and should be improved so that a bigger number of tourists could visit Wrocław, the city becoming thus an important tourist center in Europe.

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