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Evolution and Factors Determining Tourist Accommodation in Lower Silesia

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EVOLUTION OF TOURIST ACCOMMODATION IN LOWER SILESIA

Abstract

This paper presents the results of research on quantitative and structural changes concerning accommodation base in Lower Silesia in years 2000–2012. A dynamic development of hotel facilities and a strong decline in other kinds of accommodation facilities have been discovered. When searching for factors determining such changes it appeared that the activity of both state and local administration does not promote small investors in the accommodation services industry.

Keywords: tourist accommodation establishment, factors conditioning changes in accommodation facilities, Lower Silesia

Introduction

Accommodation services, next to transport, constitute the most basic, widespread, almost endogenous for tourism, form of catering to tourist traffic. Accommodation services are a key factor for tourists, who vary considerably in motivation, aspirations and financial resources. Therefore tourist-receiving areas (towns, communes, regions, countries) on their way to benefit from tourism try to create suitable conditions for the development of accommodation, which is always an important element of any tourist product.

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Lower Silesia is one of the Polish regions offering substantial tourist attractions and a well-developed tourist infrastructure. Its accommodation base undergoes constant qualitative and quantitative transformations.

The purpose of this article is to determine the volume and structure of these transformations. At the same time, it attempts to identify more important factors determining the changes.

The analysis of the volume and structure of tourist accommodation base in Lower Silesia has been based on statistical data derived from publications of the Central Statistical Office in Wrocław concerning accommodation facilities in the Lower Silesian Voivodship. The time span which the analysis covers is a consequence of the latest administrative division of Poland, which occurred in 1999. Therefore, for the purpose of comparison of data over time, the analysis encompasses the changes between 2000 and 2012 in 5-year intervals, years 2005 and 2010 are enumerated in statistic tables separately. In order to analyze factors which condition the changes both countrywide and regional documents were used, as well as other tourist-related sources.

1. The characteristics of changes in tourist accommodation base in Lower Silesia in years 2000–2012

In the analyzed period of twelve years there occurred significant qualitative and quantitative changes in tourist accommodation base in Lower Silesia (Table 1).

Table 1

Tourist accommodation facilities in the Lower Silesian Voivodship (“dolnośląskie voivodship”) in years 2000–2012

Accommodation facilities	2000	2005	2010	2012	2012/2010 %
TOTAL	812	712	726	946	116.5
Hotels	112	146	200	218	194.6
Motels	4	7	6	6	150.0
Boarding houses	85	47	58	59	69.4
Other hotel facilities	.	45	99	94	.
Excursion hostels	23	8	5	6	26.1
Shelters	60	44	44	41	68.3

Accommodation facilities	2000	2005	2010	2012	2012/2010 %
Holiday centers	169	133	104	92	54.4
Holiday youth centers	15	12	9	.	.
Training-recreational centers	57	52	43	35	61.4
Creative arts centers	7	6	4	4	57.1
Complexes of tourist cottages	44	19	22	13	29.5
Camping sites	10	14	10	13	130.0
Tent camp sites	14	7	4	6	42.9
Weekend and holiday accommodation establishments	19	10	.	.	.
Health establishments	16	11	12	.	.
Rooms for rent	.	.	.	157	.
Agrotourism lodgings	.	.	.	62	.
Others unqualified	177	151	106	140	79.1

Source: self-study on the basis of: *Tourism in dolnośląskie voivodship in the year 2004–2007*, Statistical Office in Wrocław, Wrocław 2008, p. 17; *Tourism in dolnośląskie voivodship in the year 2008–2011*, Statistical Office in Wrocław, Wrocław 2012, p. 30; *Statistical Yearbook of Dolnośląskie Voivodship 2013*, Statistical Office in Wrocław, Wrocław 2008, p. 243.

The total number of accommodation facilities grew slightly, but there occurred large structural differences. The number of hotels nearly doubled, two new motels and three camping sites appeared. For the remaining types of establishments there happened a strong regression in volume. The most visible decline concerns excursion hostels, complexes of tourist cottages and tent camp sites. The number of holiday centers, creative arts centers, training-recreational centers, boarding houses and shelters (which include shelters, youth hostels and school youth hostels) diminished too, which indicates that the direction tourist accommodation establishments in the region are moving in is towards demanding, but affluent tourists. Business tourism is a good example of such a segment of the tourist market.

The observed changes in the volume and structure of accommodation facilities make it necessary to check the impact they have on the changes in the volume and structure of bed places (Table 2).

Table 2

Beds in tourist accommodation facilities in the Lower Silesian Voivodship
 (“dolnośląskie voivodship”) in years 2000–2012

Accommodation facilities – bed places	2000	2005	2010	2012	2012/2000 %
TOTAL	53518	45631	49067	59072	110.4
Hotels	10977	13594	18419	22330	203.4
Motels	187	419	244	242	129.4
Boarding houses	3005	1885	2481	2390	79.5
Other hotel facilities	.	2017	5065	5154	.
Excursion hostels	1294	651	582	622	48.1
Shelters	3105	2373	2292	813	26.2
Holiday centers	12360	12360	6792	6719	54.4
Holiday youth centers	1373	1071	810	.	.
Training-recreational centers	3862	3452	3138	2661	68.9
Creative arts centers	216	175	115	112	51.9
Complexes of tourist cottages	2268	1033	917	611	26.9
Camping sites	811	1608	1153	1699	209.5
Tent camp sites	1390	1024	804	457	32.9
Weekend and holiday accommodation establishments	1219	583	.	.	.
Hostels	.	.	494	717	.
Health establishments	3549	1395	1539	.	.
Rooms for rent	.	.	.	3316	.
Agrotourism lodgings	.	.	.	1036	.
Others unqualified	7902	5623	2224	8700	110.1

Source: self-study on the basis of: *Tourism in dolnośląskie voivodship in the year 2004–2007*, Statistical Office in Wrocław, Wrocław 2008, p. 17; *Tourism in dolnośląskie voivodship in the year 2008–2011*, Statistical Office in Wrocław, Wrocław 2012, p. 31; *Statistical Yearbook of Dolnośląskie Voivodship 2013*, Statistical Office in Wrocław, Wrocław 2008, p. 243–244.

As it could be expected, changes in the volume and structure of establishments are accompanied by similar changes in volume and structure of bed places. There are, however, some differences. For example a higher percentage increase of beds than establishments concerns hotels (by 8.8%) and camping sites (by 79.5%), whereas the growth of the number of motels (by 50%) is accompanied

by a smaller (by 29.4%) increase in the number of beds. Therefore, in the case of hotels, in the period of time the research covers mainly large establishments were opened and small ones were closed, but in the case of motels an opposite phenomenon took place.

It is also interesting to compare the quantitative and structural changes of establishments and bed places to the number of guests staying (Table 3).

Table 3

Guests staying (in thousands) in tourist accommodation facilities in the Lower Silesian Voivodship (“dolnośląskie voivodship”) in years 2000–2012

Accommodation facilities – Guests to accommodation establishments	2000	2005	2010	2012	2012/2000 %
TOTAL	1515.3	1740.0	1895.5	2186.2	144.3
Hotels	652.3	891.2	1056.8	1301.1	199.5
Motels	22.8	39.7	20.6	19.3	84.6
Boarding houses	43.0	41.7	54.7	51.5	119.8
Other hotel facilities	.	92.9	204.6	195.6	.
Excursion hostels	34.5	27.1	35.8	44.2	128.1
Shelters	107.3	80.1	66.6	22.9	21.3
Holiday centers	229.4	195.5	142.5	145.0	63.2
Holiday youth centers	16.8	21.7	13.7	.	.
Training-recreational centers	97.0	117.2	102.8	94.6	97.5
Creative arts centers	4.8	4.1	2.4	1.7	35.4
Complexes of tourist cottages	25.5	10.5	7.7	6.3	24.7
Camping sites	9.7	16.2	12.2	20.3	209.3
Tent camp sites	4.4	1.6	0.3	1.8	40.9
Weekend and holiday accommodation establishments	15.9	6.7	.	.	.
Hostels	.	.	28.0	43.9	.
Health establishments	59.5	26.1	26.9	.	.
Rooms for rent	.	.	.	55.8	.
Agrotourism lodgings	.	.	.	9.5	.
Others unqualified	192.4	167.7	119.9	172.7	89.8

Source: self-study on the basis of: *Tourism in dolnośląskie voivodship in the year 2004–2007*, Statistical Office in Wrocław, Wrocław 2008, p. 18; *Tourism in dolnośląskie voivodship in the year 2008–2011*, Statistical Office in Wrocław, Wrocław 2012, p. 32; *Statistical Yearbook of Dolnośląskie Voivodship 2013*, Statistical Office in Wrocław, Wrocław 2008, p.244.

It appears that in the period covered, the increase of the total number of guests in tourist accommodation establishments of Lower Silesia was significantly higher than the growth of the total number of establishments and bed places offered. There are, however, important differences when the comparison is done by establishment types. A similar increase of establishments number, bed places and guests concerns hotels and camping sites. On the other hand, the development in the category of motels was not followed by the growth of the number of their guests. An opposite phenomenon is visible in the case of boarding houses and excursion hostels. The fall in the number of accommodation offered is accompanied by the growth of the number of guests. In other kinds of accommodation facilities there is a consistent regression in the number of establishments, bed places and guests.

The group of guests is not internally homogenous. These are people who spend one night in an establishment and those who stay a few days and more. The number of overnight stays in Lower Silesian establishments in years 2000–2012 is provided in Table 4.

Table 4

Overnight stays (in thousands) in tourist accommodation establishments in the Lower Silesian Voivodship (“dolnośląskie voivodship”) in years 2000–2012

Accommodation facilities – Overnight stays	2000	2005	2010	2012	2012/2000 %
TOTAL	5479.9	5479.9	4814.3	5718.1	104.3
Hotels	1306.9	1826.6	2050.6	2525.5	193.2
Motels	28.4	58.3	23.5	22.3	78.5
Boarding houses	201.2	151.4	183.1	176.5	87.7
Other hotel facilities	.	.	536.8	524.9	.
Excursion hostels	107.1	71.8	66.9	78.7	73.5
Shelters	242.9	179.6	154.9	128.4	52.9
Holiday centers	1193.5	799.6	636.5	654.1	54.8
Holiday youth centers	98.8	105.0	62.7	.	.
Training-recreational centers	376.1	391.8	341.4	300.1	79.8
Creative arts centers	15.3	12.5	8.4	5.4	35.3
Complexes of tourist cottages	119.4	48.3	25.4	21.4	17.9
Camping sites	22.8	38.7	26.1	40.1	175.9
Tent camp sites	11.5	4.3	1.0	5.6	48.7

Accommodation facilities – Overnight stays	2000	2005	2010	2012	2012/2000 %
Weekend and holiday accommodation establishments	64.3	33.5	.	.	.
Hostels	.	.	55.3	86.0	.
Health establishments	1136.4	231.5	267.8	.	.
Rooms for rent	.	.	.	163.5	.
Agrotourism lodgings	.	.	.	33.2	.
Others unqualified	555.3	1334.4	373.9	952.4	171.5

Source: self-study on the basis of: *Tourism in dolnośląskie voivodship in the year 2004–2007*, Statistical Office in Wrocław, Wrocław 2008, p. 18; *Tourism in dolnośląskie voivodship in the year 2008–2011*, Statistical Office in Wrocław, Wrocław 2012, p. 33; *Statistical Yearbook of Dolnośląskie Voivodship 2013*, Statistical Office in Wrocław, Wrocław 2008, p. 244.

The largest number of overnight stays in the period covered occurred in hotels, where the highest dynamics was observable. A smaller, but still significant growth in the number of stays concerns also tent camp sites and unclassified facilities. In the remaining categories there occurred a distinct, or even sharp regress.

The culmination of this analysis is determining the degree of use of bed places in tourist accommodation establishments (Table 5).

Table 5

The degree of use of bed places in tourist accommodation establishments in the Lower Silesian Voivodship (“dolnośląskie voivodship”) in years 2000–2012 (in %)

Accommodation facilities – Degree of use of bed places	2000	2005	2010	2012
TOTAL	28.1	32.9	26.9	26.5
Hotels	32.6	36.8	30.5	31.0
Motels	41.6	38.1	26.4	25.3
Boarding houses	18.3	22.0	20.2	20.2
Other hotel facilities	.	.	29.0	27.9
Excursion hostels	22.7	30.2	31.5	34.7
Shelters	21.4	20.7	18.5	43.3
Holiday centers	26.5	17.7	25.7	26.7
Holiday youth centers
Training-recreational centers	26.7	31.1	29.8	30.9

Accommodation facilities – Degree of use of bed places	2000	2005	2010	2012
Creative arts centers	19.4	19.6	20.0	13.2
Complexes of tourist cottages
Camping sites
Tent camp sites
Weekend and holiday accommodation establishments
Hostels
Health establishments	87.7	45.5	47.7	.
Rooms for rent	.	.	.	13.5
Agrotourism lodgings	.	.	.	8.8
Others unqualified

Source: self-study on the basis of: *Tourism in dolnośląskie voivodship in the year 2004–2007*, Statistical Office in Wrocław, Wrocław 2008, p. 18; *Tourism in dolnośląskie voivodship in the year 2008–2011*, Statistical Office in Wrocław, Wrocław 2012, p. 33; *Statistical Yearbook of Dolnośląskie Voivodship 2013*, Statistical Office in Wrocław, Wrocław 2008, p.244.

Information included in the table above shows that in year 2012, the last of those analyzed, the highest degree of bed places use occurred in shelters and excursion hostels, and the lowest one agrotourism lodgings, creative arts centers and rooms for rent. In other facilities – hotels, motels and boarding houses the degree of use was between 20% and 31%. Analyzing this phenomenon dynamically it is possible to see a fluctuation of a few percent in the stage years studied in most types of establishments. However, the clearly progressive fall in the use of beds in boarding houses and its surprisingly large growth in shelters in years 2000–2012 must be noticed.

To sum up the conclusions made in this part of the study it must be said that these were hotels that developed most dynamically in Lower Silesia, especially the high category ones. This is confirmed in Table 6.

In the same period of time there appeared a strong quantitative regress of establishments catering to less affluent tourists, such as excursion hostels, complexes of tourist cottages, tent camp sites, holiday centers, creative arts centers, training-recreational centers, boarding houses and shelters, which include youth hostels and school youth hostels. The fall in their number resulted in the decrease of bed places and guests using them.

Table 6

Hotel facilities in Lower Silesia (“dolnośląskie voivodship”) in years 2004–2011
by category

Hotel facilities - categories	2004	2005	2008	2010	2011	2011/2004 %
*****	-	-	2	4	5	250.0*
****	11	11	14	18	18	163.6
***	55	58	81	95	102	185.5
**	39	40	46	46	41	105.1
*	26	27	27	30	29	111.5
In the process of being categorized	17	10	8	7	7	41.2

* 2011/2008

Source: self-study on the basis of: *Tourism in dolnośląskie voivodship in the year 2004–2007*, Statistical Office in Wrocław, Wrocław 2008, p. 59; *Tourism in dolnośląskie voivodship in the year 2008–2011*, Statistical Office in Wrocław, Wrocław 2012, p. 107.

Finally it must be emphasized that making an attempt to analyze quantitative and structural changes over the period of a dozen years encountered a serious information barrier resulting from numerous changes in the system of qualifying establishments in the Statistical Office’s publications, which makes some data incomparable for the period covered by this study. It made the author resign from analyzing some interesting phenomena.

2. Factors conditioning changes in the accommodation establishments base.

Assuming that conditioning factors are circumstances influencing a given phenomenon, in this case the evolution of tourist accommodation base in Lower Silesia, all the factors were divided into two groups:

- factors influencing the demand for accommodation services and, indirectly, the functioning and development of accommodation establishments base (demand factors),
- factors influencing the supply of accommodation services (supply factors).

From the viewpoint of the evolution of accommodation base in Lower Silesia demand factors may be divided into those that spring from the ambient and those which come from the internal environment of the region.

Demand factors resulting from the **ambient** are mainly the policy of the country with relation to tourism aimed directly or indirectly at the development of tourist flow in Lower Silesia.

An example element of such policy is the government document “Directions of Tourism Development till year 2015” accepted by the Council of Ministers on 26 September 2008. This document formulates four priority areas, one of which was aimed at affecting tourist demand. This pro-demand priority was called “marketing support”. It encompasses two operational objectives:

III.1. Improvement of tourist information system,

III.2. Boosting the effectiveness of marketing activities in tourism.

The sense of the first operational objective is to pursue the dynamic development of existing systems of tourist information and modern IT services adapted to the ever-changing needs of the market. This meant, among other things, including the system into the international one in the face of UEFA’s granting to Poland and Ukraine rights to organize the finals of the European Football Championships EURO 2012. In order to realize this goal two tasks were formulated:

- 1) the development and extension of an integrated system of tourist information,
- 2) incorporating modern technologies into the development of the system of tourist information and reservation.

The second operational goal shows, that the development of marketing should be characterized by the integration of actions in the vertical and horizontal layout and be especially based on the Polish Tourist Organization, as well as the Regional and Local Tourist Organizations. Three objectives are to help reach this aim:

- 1) supporting the creation of competing tourist products,
- 2) building of an integrated system of tourist marketing,
- 3) the development of effective instruments of tourist marketing.

There are reasons to positively evaluate the realization of the demand priority. According to research carried out by the Institute of Tourism and Active Group in 2012, the number of arrivals of international tourists to Poland was estimated to be 14.8 million, that is 11 percent more than in 2011. Only to par-

ticipate in “EURO 2012” 677 thousand tourists from 123 countries came to our country. The Department of Sport and Tourism estimates that the income from tourism related to the tournament amounted to 1.12 billion zloty.¹ Undoubtedly, such a large increase in the number of international tourists arriving in Poland had some impact on the growth of stays in Lower Silesian hotels in year 2012, if only for the fact that Wrocław was one of the host cities of the tournament.

Demand factors springing from **the internal environment of the region** include mostly the policy towards tourism carried out by the authorities of the region. A good example is “Update to the Tourism Development Program for the Lower Silesian Voivodship” created by the Polish Agency for Tourism Development in 2009. Five priorities were defined in it:²

Priority 1. The development of products,

Priority 2. Marketing support,

Priority 3. The improvement of quality infrastructure in the region,

Priority 4. Human capital,

Priority 5. Institutional support in tourist subregions.

Within priority 2. “Marketing support” four operational objectives were formulated, three of which have a pro-demand character:

- Objective 2.1. Implementing a comprehensive system of marketing research and tourist traffic monitoring in the region,
- Objective 2.2. Building the system of e-tourism in Lower Silesia,
- Objective 2.3. Running a campaign promoting the tourist offer of the region.

Priority 3. “Building the system of e-tourism in Lower Silesia” encompasses four operational objectives, one of which, Objective 3.4. “the improvement of modern systems of orientation” has a pro-demand character.

Priority 4. “Human capital” is also composed of four operational objectives, one of which, Objective 4.3. “Preparing the inhabitants of the province to receive tourists” has also got features of a pro-demand objective.

¹ www.propertynews.pl (accessed 6.03.2014).

² *Aktualizacja Programu Rozwoju Turystyki dla Województwa Dolnośląskiego*, Polska Agencja Rozwoju Turystyki, Warszawa 2009 “Update to the Tourism Development Program for the Lower Silesian Voivodship”, Polish Agency for Tourism Development, 2009, <http://www.dip.dolnyslask.pl/683/49382/program-rozwoju-turystyki-dla-wojewodztwa-dolnoslaskiego.html> (accessed 6.03.2014).

In order to realise the objectives mentioned above, a number of actions have been defined that should make Lower Silesia interesting to potential domestic and international tourists, have them visit the region and, in consequence, use accommodation services.

Results of a research on tourist traffic, carried out in 2012 by BIOSTAT³ via direct and telephone surveys on large groups of respondents, show the effects of the pro-demand activity of the authorities of the Lower Silesian Voivodship. 18.4% potential tourists from Greater Poland, Silesian, Opole, Lubusz and Lower Silesian Voivodships who took part in the survey, did not visit Lower Silesia in years 2010–2012. Respondents who did visit the region (about 50% of total) spent time there once or twice. They stayed mostly in hotles, motels and boarding houses. Foreign tourists constituted about 10% of guests in Lower Silesian accommodation facilities. The survey did not include high school or college students. Results of research, based in some part on the data from Central Statistical Office, allow to conclude that the volume and structure of tourist traffic in Lower Silesia is moderately satisfactory.

Moving to the evaluation of **supply factors** in accommodation services it has been assumed that they have their sources mostly in the internal environment of the region. Therefore, going back again to the regional document “Update to the Tourism Development Program for the Lower Silesian Voivodship”, it must be stated that operational objectives of pro-supply character are mentioned in:

Priority 3. “the improvement of quality infrastructure in the region”,

Operational objective 3.2. “Revitalization, revalorization of areas endangered by material and social degradation to serve recreational, cultural goals and activate development”,

Activity 3.2.2. “Implementing solutions which enrich the urban infrastructure of tourist information and its supplementary base on the basis of revitalization and revalorization of industrial facilities processes, among others hostels – boarding houses with an inexpensive accommodation product.

³ *Badanie ruchu turystycznego na Dolnym Śląsku w ujęciu powiatowym i subregionalnym wg Aktualizacji Programu Rozwoju Turystyki dla Województwa Dolnośląskiego*. Raport końcowy, BIOSTAT, Rybnik – Wrocław 2012 www.turystyka.dolnyślask.pl/i (Research on tourist traffic in Lower Silesia by powiats and subregions acc.to “Update to the Tourism Development Program for the Lower Silesian Voivodship” Polish Agency for Tourism Development, 2009) (accessed 6.03.2014).

Priority 5. “The institutional support in tourist subregions”.

Operational objective 5.1. “Organizational strengthening in tourist subregions”,

Activity 5.1.2. “Stimulating the development of the non-government sector and the tourist industry, which includes, among others, creating a system of investment incentives”,

Operational objective 5.2. “ Supporting the creation of co-operation platforms within the PPP (public-private partnership) formula,

Activity 5.2.2. “Stimulating the development of tourist investment and realisation of projects in the PPP formula”, including, among others:

- consulting for tourist sector businesses,
- creating legal procedures making PPP possible.

“Update to the Tourism Development Program for the Lower Silesian Voivodship” formulates five projects, which together include 19 operational objectives and 96 key activities within them. Therefore it must be said that the authorities of the province treat the development of tourist accommodation base as a marginal issue and leave it almost entirely to investors and already existing establishments.

Conclusion

This analysis of the evolution of accommodation base in Lower Silesia in years 2000–2012 shows that even if the total number of accommodation facilities grew slightly, there appeared important structural changes. The number of hotels, especially those of high classification, almost doubled, and yet there occurred a strong decline in the number of the remaining types of facilities, mostly those used by less affluent tourists and young people. As a derivative of these transformations, changes in the number of bed places occurred – a steep increase in hotels and a dip in cheap accommodation establishments. As a consequence, the volume of tourists staying in specific types of facilities changed respectively – it nearly doubled in hotels and fell considerably in other types of establishments. The interesting thing is that the aforementioned transformation did not inspire revolutionary changes in the degree of bed places use. It remains similar in all kinds of facilities, which may prove that these were not changes in demand that brought about the changes, but rather a lack of relevant steps taken in the micro-

and macro-environment. Indeed, the analysis of program documents concerning the development of tourism in Poland and Lower Silesia carried out by the author of this paper, however simplified, leaves no place for doubt that tourist accommodation base is treated marginally. Steps taken by the government and local administration so far are hardly creative with relation to potential and existing accommodation establishments. They refer mostly to quality aimed policy,⁴ which includes classifying, categorizing, listing and controlling accommodation facilities.⁵ Regional and local authorities are mostly interested, for ambition reasons, in creating conditions for large-scale hotel investment. Small investors, who plan to build new facilities, modernize or adapt old, ruined ones to provide less representative accommodation services, are usually left alone. The results of the research carried out in this study prove it distinctly. It may be therefore stated, that in the scope of accommodation products there is a tendency to depart from the educational and pedagogic function of tourism in order to achieve the highest profitability and fulfill ambitions.

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⁴ *Jakość usług turystycznych*, A. Panasiuk (ed.), Wydawnictwo Naukowe Uniwersytetu Szczecińskiego, Szczecin 2007, p. 89–96.

⁵ Ustawa z dnia 29 sierpnia 1997 roku o usługach turystycznych, Dz. U. 2004, nr 223, poz. 2268 z późn. zm., www.propertynews.pl.

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www.propertynews.pl (Tourist Services Act dd. 29 August 1997, Journal of Laws 2004, No. 223, as amended)

EWOLUCJA TURYSTYCZNEJ BAZY NOCLEGOWEJ NA DOLNYM ŚLĄSKU I JEJ UWARUNKOWANIA

Streszczenie

W opracowaniu zaprezentowano wyniki badania przemian ilościowych i strukturalnych bazy noclegowej na Dolnym Śląsku w latach 2000–2012. Stwierdzono dynamiczny rozwój bazy hotelowej i silny regres pozostałych rodzajów bazy noclegowej. Poszukując uwarunkowań tych przemian stwierdzono, że zarówno działalność administracji rządowej, jak i samorządowej nie ma charakteru kreatywnego w stosunku do drobnych inwestorów w branży usług noclegowych.

Słowa kluczowe: turystyczna baza noclegowa, uwarunkowania przemian bazy noclegowej, Dolny Śląsk