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АНАЛІЗ ЗАКЛАДІВ РОЗМІЩЕННЯ У ВИБРАНИХ МІСТАХ ПОЛЬЩІ В КОНТЕКСТІ ЄВРО-2012

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Рівень розвитку туризму в окремих регіонах і країнах значною мірою залежить від стану готельного господарства. В закладах розміщення надається значний спектр послуг які задовольняють потреби туристів під час їх перебування за межами постійного місця проживання. Індустрія гостинності – прибуткова галузь, яка має значний потенціал для росту. Розвиток внутрішнього та міжнародного туризму значною мірою пов'язаний з рівнем матеріально-технічної бази туристичних підприємств, розгалуженістю та різноманітністю їх мережі, якістю та обсягом послуг, пропонованих готельним господарством.

Отримання права на проведення ЄВРО-2012 надало значного поштовху для розвитку готельного господарства в країні. Сьогодні спостерігається динамічне збільшення приблизно на 5% кількості ліжко-місць у закладах розміщення в межах Польщі. Починаючи з 2005 року щорічно будується понад 50 готелів, проводиться ґрунтовна реконструкція існуючих об'єктів. Очікується надходження інвестицій протягом 2008-2012 рр. в готельну індустрію на суму понад 4 млрд польських злотих.

Згідно аналітичних даних, в містах-організаторах ЄВРО-2012, спостерігається нестача понад 40 тисяч ліжко-місць. Внаслідок проведених досліджень встановлено, що оптимальна вартість ліжко-місця має становити 20-30 Євро за добу. Для розселення туристів можливо використовувати також невеликі приватні заклади розміщення.

При формуванні загальної бази розміщення потрібно враховувати, що головними регуляторами ринку є рівень попиту і пропозиції. Ці показники визначають кількість послуг, відповідність стандартам, а також місце розміщення об'єктів.

Ключові слова: Євро-2012, готелі, розміщення, міста-оргнізатори, аналіз.

According to Eurostat data Poland ranks the worst country in Europe with respect to the number of hotel beds and beds offered in similar accommodation facilities. A big divergence in the development of accommodation facilities between Western Europe and Central and Eastern Europe results, among others, from differences in climate and dependence of the national economy on tourism. In the countries of the previous EU, tourism sector generates about 11% of GDP employing over 12% of the total number of the professionally active. In Poland, tourism is estimated to generate about 6% of GDP, employing about 7% of all the professionally active in Poland. Therefore, it may be stated that Polish economy is not dependant on tourism, Poland does not have a Mediterranean climate and the supply of as many beds as in Italy or Spain, for instance, is not in demand. However, the quantitative and qualitative analysis of the accommodation facilities market shows that Poland is one of the leaders in the region. We can observe a dynamic increase of about 5% in the number of hotel beds and beds in other types of accommodation facilities in Poland. Since 2005 about 50 new hotels are built annually, and investments in the hotel industry in the period from 2008 to 2012 are expected to exceed 4 billion PLN.[3]. A significant increase in the number of top class hotels over the last few years is of great importance. As we can see thus, although the accommodation facilities network in Poland may be not as extensive as in some popular touristic countries, still it is not stagnant, it is in the development stage and is clearly expanding. Thus, we can formulate a thesis that Euro 2012, due to marketing of the country abroad as well as due to the construction of new roads, which in turn, shall make the particular facilities more available, is to bring indirect benefits to accommodation facilities.

Analyzing the number of beds in accommodation facilities in host cities of EURO 2012 an estimate of demand level with respect to beds in accommodation facilities shall be attempted. The shortage of 40 thousand beds, mentioned by the analysts and the proposal of the construction of over 500 new hotels seem overexaggerated figures. The data showing big differences in the saturation of beds in accommodation facilities across the country does not account for the facilities operating in the so-called grey market. Such differences to a great extent reflect the economic situation of the region concerned and its touristic attractiveness.

According to the data published by the Main Statistical Office on the hotel infrastructure in Poland, at the end of 2007 there were about 1,370.00 accommodation facilities in Poland, including 108 undergoing categorization. Only in 2007 75 new hotels were built in Poland. According to the Institute of Tourism, in 2007 almost 10 mln tourists used the accommodation services in Poland. Estimates for 2012 assume a 50% increase. At the same time the rate of vacancies in hospitality facilities (hotels, motels, guest houses and similar) reached 60%. Thus, we can come up with a hypothesis that if by 2012 the number of the said hospitality facilities did not increase, there still would be a vacancy for a guest seeking accommodation, as a result, the number of the facilities would remain the same, but profitability of the said facilities would increase a lot.

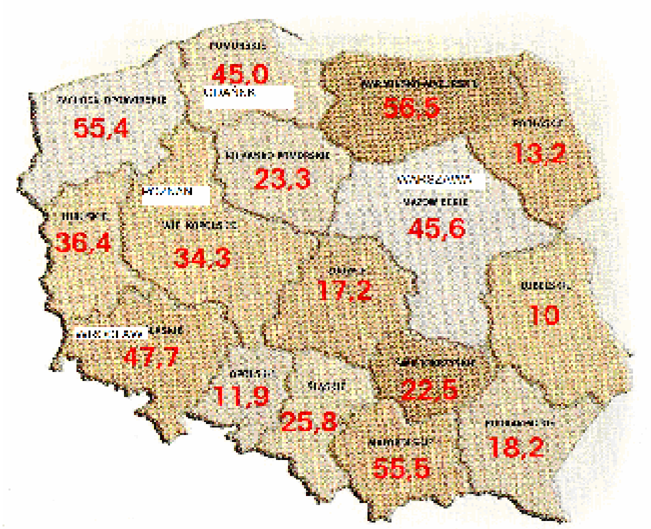

Figure 1 Saturation of beds in accommodation facilities* in Poland in 2007.
(per province)

* number of beds in accommodation facilities in hotels categorized per 10 thousand of inhabitants

Source: Report on hotel industry in Poland, Hotelarz 2008, p.38

[3]Estimate figures prepared by experts of the industry-specific magazine „Hotelarz”

There is, however, one drawback to this hypothesis. The challenge for the hotel market is not the estimated number of guests to accommodate but their high density in time and space. The total number of beds in all of the collective accommodation facilities which have been categorized was 580 thousand in 2007. It must, however, be remembered that the Europe Cup is to take place at the turn of spring into summer, which means beds offered in seasonal accommodation facilities shall also be available. Moreover, the categorized hotel accommodation offer shall be supplemented with the private accommodation offer (about 150 thousand) and accommodation services of entities operating in the so-called grey market (about 150 thousand), that is in total we arrive at the figure of about 875 thousand beds in accommodation facilities. The predicted demand and supply of the accommodation services in host cities of the Euro Cup are shown in table 1.

The estimated demand for accommodation based on the number of spectators at particular stadiums shall be further supplemented with the number of foreign and domestic visitors, visiting the cities for reasons other than football matches. According to the data of the Institute of Tourism, Warsaw, Gdansk, Poznan and Wroclaw were visited together by almost 4.5 mln visitors in 2007. It might, however, be assumed, that part of the tourists not interested in this mass event, will put off the date of their visit. It's worth stressing, here, that the supply of accommodation services is clearly underestimated. The officially presented numbers of beds shall be supplemented with the facilities operating in the so-called grey market.

Table 1

Demand and supply of the accommodation services in host cities of EURO 2012.

CITY	STADIUM number of spectators	Number of beds in categorized accommodation facilities:		
		hotels	total	projects
WARSAW mazowieckie province	55,000.00	18,000.00 23,000.00	30,000.00 58,000.00	+2,200.00
GDAŃSK (Tri-City) pomorskie province	44,000.00	3,000.00 10,000.00	10,000.00 85,000.00	+2,500.00
POZNAŃ wielkopolskie province	50,000.00	6,000.00 11,000.00	8,500.00 36,000.00	+1,700.00
WROCŁAW dolnośląskie province	42,200.00	6,000.00 13,000.00	22,000.00 47,000.00	+7,000.00

Source: Main Statistical Office: „Vacancy rates in accommodation facilities in 2007", Institute of Tourism, regional organization offices for EURO in host cities.

According to the information of the Tourism Office of the Economic Policy Dept., at the Municipal Office in Gdansk, the city has enough hotel amenities to meet the demand of EURO 2012. Gdansk has over 10 thousand beds in accommodation facilities, still, thanks to its convenient location, the visitors arriving to EURO 2012 can use the services of the accommodation facilities situated in the whole area of the Tri-City. Low category of certain types of accommodation could pose a problem, to tackle it, the city authorities plan to bring over to the city luxury ships to increase the number of beds in the standards corresponding to the standards of 4 star or 5 star hotels. Poznan also faces the shortage of luxury hotel facilities. UEFA expects the city to build 5 star hotels offering about 2 thousand hotel beds and 4 star hotels accommodating about 1,300.00 guests. The UN Climate Change Conference which is to take place in Poznan in December this year shall be a test for the hotel industry. 9-10 thousand guests are planning to attend the conference.

Wroclaw is dynamically preparing for Euro 2012. The city intends to expand its range of accommodation facilities with 15 new hotels rating from 1 to 5 star. The hotels shall increase the number of hotel beds in the city by about 7 thousand and the number of hotels beds located within a 2 hour drive radius from the city by additional 5 thousand. The city authorities are planning to shorten the academic year in 2012 and make the beds occupied by students in the students' houses and private flats available to the arriving guests. Further, temporary camping sites are planned to be set up on recreation areas. This shall allow Wroclaw to reach about 60 thousand beds in the city and nearby areas. Of all cities in Poland, Warsaw can boast the highest number of luxury accommodation facilities. Yet, rough analysis of the football fans' preferences shows they are willing to spend the average of 20-30 Euros per night, which means they will not be interested in accommodation offered by hotels rating higher than tourist class hotels. It is the expansion of the cheap accommodation offer which poses the greatest problem for Warsaw with respect to Euro 2012. For that reason, it was decided that the number of beds in the accommodation facilities in Warsaw shall be supplemented with beds available in students' houses and hostels as well as in the accommodation facilities located in Lodz or Lublin.

Therefore, the fear that Poland may be excluded from the organization of the Europe Cup because of the shortage of beds in the accommodation facilities seems groundless. UEFA sets no requirements with respect to the saturation of the accommodation services. It is, however, important that possibly the highest number of beds was available within 75 km from the stadium. If adequate care was given to the development of roads and fast transport links in the regions hosting the sporting events, certainly more accommodation facilities could benefit from the demand of the football fans for such tourist services. Host cities are obliged to offer beds in minimum three 5 star hotels and minimum five 4 star hotels.

Table 2

Selected hotels in host cities of the Europe Cup

CITY	EXISTING HOTELS	PLANNED HOTELS
WARSAW	5* - 10 4* - 7	5* - 3 4* - 1
GDAŃSK	5* - 2 (+ 2 in Sopot) 4* - 3 (+ 1 in Gdynia)	5* - 2 (+1 in Sopot) 4* - 2
POZNAŃ	5* - 1 4* - 5	5* - 3 4* - 5
WROCŁAW	5* - 2 4* - 7	5* - 2 4* - 1

Source: Industry-specific magazine „Hotelarz”, issue 2 (541) February 2008, p. 12-13.

As the data in table 2 shows only Warsaw meets the requirements set by UEFA. Yet, some of the planned hotels in other cities are already under construction. To attract prospective investors, local authorities exempt them from the real estate tax and compile the register of land designated for the development of tourism and sports. Moreover, they also give assistance to strategic investors assigning a special project advisor to them.

A great chance for 4 and 5 star hotels is to become the accommodation centre housing the football teams. After first verification carried out by the Polish Football Association, the Association recommended 110 facilities to UEFA. Yet, because of the recommendations of the organizers of the Europe Cup, all the facilities filed by large host cities and the cities where the hotels may be used for UEFA Family were crossed out from the list. Such recommendations were the result of the current shortage of the top class hotel rooms in host cities.

Being a host to national football teams during the Europe Cup means not only high income during the sporting events but also a chance for becoming a „tourist attraction" and attracting tourists over the next years.

Eventually, 44 „candidates" were recommended to UEFA for the accommodation centers. Taking into account the progress of works on the selected centers and the estimated completion dates (2010) the risk of failure is assumed low in this field. Yet, at the moment, all of the centers require either the preparation of the investment projects (football pitches, hotels), modernization works or the quality improvement of sports facilities or hotels.

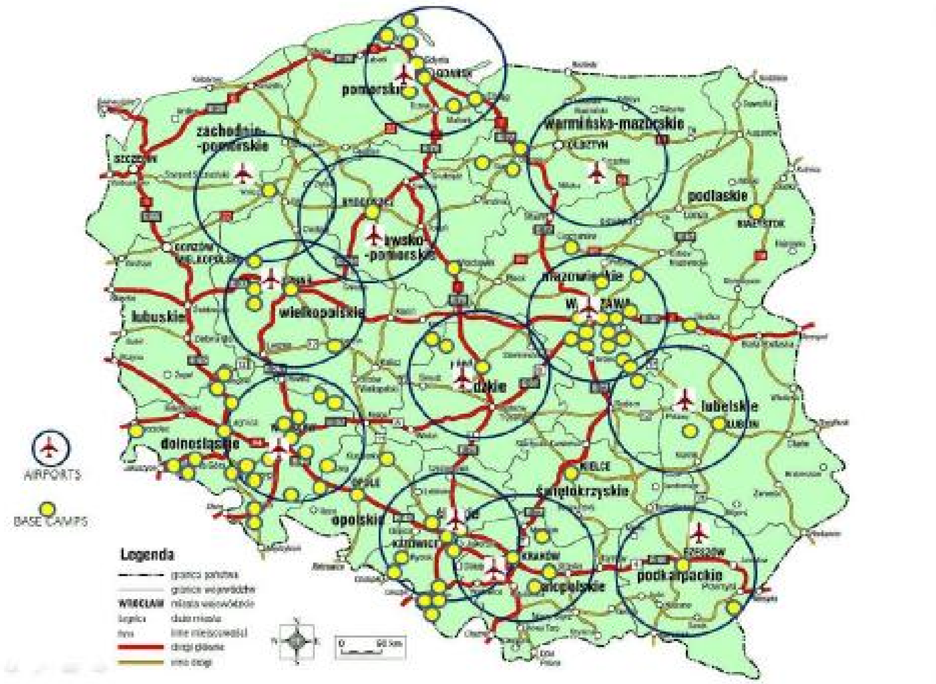

Figure 2 Map of the accommodation centers recommended to UEFA

Source: Report prepared by the team for the second verification of accommodation centres for the teams participating in the final Europe Cup UEFA EURO 2012 p. 6 published on: www.pzpn.pl

Due to the general interest of investors in accommodation facilities, provinces located in the east of Poland fear the transition of investors to host cities or nearby areas. The biggest investment outlays in the infrastructure shall be made in the regions hosting the sporting events of the Cup. Provinces in the east can only prepare well for drawing profits from providing services to transit movement and wait patiently for Ukraine to join the EU, then the tourism and business in the region shall become more lively.

It is, however, hardly credible, that the investor who decides to construct a new hotel facility shall only account for the organization of the Europe Cup in the region, as in Poland the return on investment period may be as long as 10 years. It must be remembered that decisive factors for the location of an investment project are to a great extent: wealth of the community and touristic attractiveness of the region. According to some of the analysts, in host cities of the

Europe Cup there is a shortage of over 40 thousand beds in accommodation facilities. Yet, accounting for declared by the football fans as acceptable cost of accommodation, the amount of 20-30 Euros per night, it may be assumed that all the beds may be provided using the accommodation offered on the so-called grey market and temporary, cheap accommodation which may be provided in e.g. sleeping train compartments, segments of concrete pipes (used in Ottensheim in Austria). We must not forget that these are the supply and demand forces that are the best market regulators and they are decisive with respect to how many facilities, of what standards and where need to be constructed.

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1. Main Statistical Office: Vacancy rates in accommodation facilities in 2007
2. Institute of Tourism (statistical data published on www.intur.com.pl)
3. Report on hotel industry in Poland, Hotelarz 2008
4. Industry-specific magazine „Hotelarz”, issue 2 (541) February 2008

THE ACCOMMODATION ANALYSIS IN THE SELECTED CITIES IN POLAND WITHIN THE CONTEXT OF EURO 2012

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We can observe a dynamic increase of about 5% in the number of hotel beds and beds in other types of accommodation facilities in Poland. Since 2005 about 50 new hotels are built annually, and investments in the hotel industry in the period from 2008 to 2012 are expected to exceed 4 billion PLN.

According to some of the analysts, in host cities of the Europe Cup there is a shortage of over 40 thousand beds in accommodation facilities. Yet, accounting for declared by the football fans as acceptable cost of accommodation, the amount of 20-30 Euros per night, it may be assumed that all the beds may be provided using the accommodation offered on the so-called grey market and temporary, cheap accommodation which may be provided in e.g. sleeping train compartments, segments of concrete pipes (used in Ottensheim in Austria). We must not forget that these are the supply and demand forces that are the best market regulators and they are decisive with respect to how many facilities, of what standards and where need to be constructed.

Key words: EURO 2012, hotels, accommodations, host cities, analysis

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