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COMPETITIVENESS OF POLISH CITIES IN THE INTERNATIONAL MEETINGS MARKET

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ABSTRACT
The international meetings industry has become very challenging from the destination managerial point of view. There has been an increasing number of cities bidding for international meetings and events. To be successful, they should meet strict criteria set by associations and other institutions acting as meeting hosts in bidding processes. Therefore, the aim of the paper is to assess the potential of Polish cities for competing in the international meetings market. A desk research was conducted to analyse critical resources divided into four dimensions: meetings industry, economic, tourist, and green. On the basis of this research, the overall index of competitiveness and the classification of cities was identified. Moreover, cluster analysis was used to recognise which cities have a similar potential in developing the meetings industry. The results show that the most competitive Polish cities are Warsaw and Cracow.

KEYWORDS
Cities, cities' competitiveness, international meetings industry, convention bureau, Poland.

Introduction

Urban destinations have become significant and active players on the international meetings market. This is an indirect result of how this market is structured and how it performs. On behalf of cities treated as organisational entities and market players–and being in close partnership with local governments–convention bureaux, destination management companies, and professional congress organisers compete with other cities bidding for meetings and events that fit those cities' economic profiles and images.

Every bidding process is executed under a wide set of criteria that must be fulfilled by destinations treated as potential meeting hosts. Moreover, the period between cities sending the expression of interest in hosting an event and the time of the actual event is usually 2-4 years. That is why cities should develop various resources not only from the meeting infrastructure side but also those that characterise their social, economic, and development potentials as well as tourist attractiveness. Although these criteria differ in terms of details depending on the type, scope of impact, and industrial characteristics of a given meeting, a set of them can be distinguished on the basis of in-depth literature and bidding documents' review.

When the destination site selection criteria and the strategic aspects of bid process are studied, it can be concluded that they refer indirectly to the cities' competitive advantage determinants in the long, sustainable term [Porter, 1990]. The more international meetings and events the city wins (and even bids for), the more competitive and sustainable it becomes.

The aim of the paper is to assess the competitive potential of Polish cities in the international meetings market. To have this achieved, the index of cities' meetings industry competitiveness will be established based on the most frequent selection site criteria mentioned in the literature of the subject and being in line with cities' competitiveness determinants.

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The index will be verified on Poland's ten biggest cities. Moreover, the assessed cities will be classified using cluster analysis to find which cities have similar meetings industry potential.

The paper is organised as follows. The first chapter explores the meetings industry, bidding criteria and regional competitiveness issues. The second discusses the methodological aspects of the research. The results section lists Polish cities specified the study. Lastly, the findings are discussed with Porter's competitiveness analysis.

Literature review

Meetings industry

According to UNWTO classification [UNWTO, 2010], besides personal trips, professional and business ones are one of the two main purposes of tourist travels However, they also form the core of the meetings industry [Celuch, 2015], also called the business tourism industry or the MICE industry [Davidson & Cope, 2003]. The names are taken from its crucial activities, i.e. taking part in meetings, incentives, conferences, and exhibitions. Another acronym describing this industry is MCCI, which is composed of associations conventions and congresses, corporate meetings, incentives and exhibitions [UNWTO & ETC, 2015]. The term "meeting" can not only be related to one of the main kinds of events [Council Convention Industry, 2011; Davidson & Cope, 2003], but it can also represent all business events mentioned above [Celuch, 2015]. Because of the diversity of meetings and the variety of entities which organise them, the meetings industry is comprised of multiple companies and institutions [Davidson, 2001; Rogers, 2013]. They all create a local business tourism product and enable a city to win rights to host different kinds of meetings and to bring about positive effects ensuing from those events.

A company or an association planning to organise a meeting needs a set of goods and services, rather than one particular product from a single producer. Therefore, previous studies about the meetings industry analyse the critical criteria considered in the decision-making process when choosing a location to host a meeting [Baloglu & Love, 2005; Chacko & Fenich, 2000; DiPietro, Breiter, Rompf, & Godlewska, 2008; Fenich, 2001; Nelson & Rys, 2000; Oppermann & Chon, 1997; Oppermann, 1996; Upchurch, Jeong, Clements, & Jung, 1999]. All the authors study cities' ability to provide all necessary goods and services and to help achieve the main host's (or the meeting owner's) goals. Thus, it can be stated that the researchers indirectly cover the meetings industry competitiveness of cities as analysed factors constitute the local resources which build a city's competitive advantage in the national and international meetings market.

The systematic literature review of the Scopus database ('destination site selection', 'site selection', bidding for meetings', 'bid process' were used as keywords) and other selected papers and documents from 1977 to 2015 has shown that the most frequent (but not necessarily the most important) decision factors include accessibility and tourist appeal (23 indications, see Table 1). It is worth mentioning that there is a distinction between destination accessibility and distance (3 indications) as the ease of travelling plays a vital role in choosing a host city whereas the travelling distance is barely significant in bids for international meetings. Another factor that is often referenced in this context (21 indications) is accommodation potential, i.e. the number of available hotel rooms for delegates, a hotel's standard, etc.

Surprisingly, meetings facilities are listed as the fifth most often mentioned factor (19 indications), just after cost level (20) which covers overall expenses of organising an event

and prices of particular products and services. Other criteria mentioned or analysed in the literature are climate (16 indications), restaurants/catering facilities (15), destination image (14) and safety (12). It is very important to stress that these tourist competitiveness-related criteria outweigh business-related determinants such as local support (10), economic conditions (8), and business making opportunities (4). However, the last two factors have been mentioned more frequently in recent years.

Towards cities' competitiveness on the meetings market

According to M. Porter [1990], a sector analysis of competitiveness is crucial as competitive advantages of nations are based on strengths in particular industries. International success in one of the industries depends on the competitive environment for local companies which is determined by six groups of broad factors incorporated into the diamond model [Porter, 1990]: (1) factor conditions, (2) demand conditions, (3) related and supporting industries, (4) firm strategy, structure and rivalry, (5) government, (6) chance. The first group refers to the most important factors of production being available in a particular industry. The second one describes the local demand, and its size, structure, etc. Next, competitiveness of related and supplier industries can guarantee the success in international markets. The fourth category includes all formal conditions determining the activity of local companies and the domestic rivalry. Government activities at local, regional, national and supranational level can influence each of the four previously mentioned determinants of competitiveness. The last factor, namely chance events, are random occurrences that are outside of firms' control and create discontinuities [Porter, 1990].

Even though many researchers have investigated city competitiveness [e.g. Bailey, Docherty, & Turok, 2002; Bruneckiene, Cincikaite, & Kilijoniene, 2012; Dou, Li, Gan, Wang, & Yang, 2000; Kresl & Singh, 1999; Rondinelli, Johnson Jr., & Kasarda, 1998; Rozenblat, 2010] or tourism destination competitiveness [Crouch, 2011; Dwyer, Forsyth, & Rao, 2000; Dwyer & Kim, 2003; Enright & Newton, 2004; Kozak, Baloğlu, & Bahar, 2009; Kozak, 1999; Ritchie & Crouch, 2003, to name just a few], there is still little analysis of meetings industry competitiveness, especially from the regional standpoint. M. Kozak & S. Baloglu [2011] state that there is a need for models of sector competitiveness strictly dedicated to the tourism industry because of "a fundamental difference between the nature of the tourism product and the more traditional goods and services" [p. 27]. It can be claimed that the meetings industry also needs the competitiveness model approach on the regional/city level.

The results of the literature review (Table 1) can be incorporated into Porter's diamond of his competitiveness approach. A fusion of site selection criteria and competitive advantage analysis reveals the structure of cities' meetings industry competitiveness. Therefore, research on competitiveness of this industry needs a multi-faceted investigation. Such a complex approach has used in previous studies [Baloglu & Love, 2005; Chacko & Fenich, 2000; Oppermann, 1996], yet they mainly describe case study research focused on the way in which conference attendees perceive a city's attributes. That is why they do not quite refer to city competitiveness in relation to the meetings industry and in comparison to other destinations. The index of city's meetings industry competitiveness is proposed based on the two approaches presented in the section. The index analyses a city's potential to compete for the international meetings.

Table 1. Examining site selection criteria in meetings industry – the literature review.

No.	Author / Factors	Accessibility	Tourism appeal	Accommodation	Costs	Meeting facilities	Climate	Restaurants / Food	Image	Safety	Shopping	On-site assistance / Local support	Economic / political conditions	Business opportunities	Distance
1	Fortin & Ritchie [1977]	X	X	X		X	X	X		X					
2	McCleary [1978]	X		X	X	X		X			X				
3	Hall [1980]		X	X	X	X						X			
4	Pizam & Manning [1982]	X	X	X	X	X		X				X			
5	Var, Cesario & Mauser [1985]	X	X	X	X	X	X		X						X
6	Led & Levite [1986]														
7	Reed Travel Group [1988]	X	X	X	X	X	X		X						X
8	Zia [1988]	X	X	X				X		X					
9	Heath [1989]									X			X		
10	Lawson [1991]		X		X		X	X			X				
11	"Checklist: Site selection" [1993]	X	X				X	X			X				
12	Successful Meetings [1993]			X	X					X					
13	Bonn, Brand & Ohlin [1994]	X	X	X			X			X	X				
14	Edelstein & Benini [1994]	X	X		X	X	X		X						
15	Zelinsky [1994]	X	X		X	X			X						X
16	Judd [1995]		X	X				X							
17	Kirschbaum [1995]	X						X	X		X				
18	Oppermann [1996]	X	X	X	X	X	X	X	X	X					
19	Go & Zhang [1997]	X	X	X	X	X	X	X	X			X	X		
20	Crouch & Ritchie [1998]	X	X	X	X	X	X	X	X		X	X	X	X	
21	Nelson & Rys [2000]	X	X	X	X	X	X	X		X	X				
22	Fenich [2001]	X	X	X	X	X	X	X		X			X		
23	Getz [2003]	X	X	X	X	X			X	X		X			
24	Baloglu & Love [2005]	X	X	X	X	X	X	X	X	X	X	X	X		
25	Comas & Moscardo [2005]	X	X	X	X	X	X		X						
26	DiPietro, Breiter, Rompf & Godlewska [2008]	X	X	X	X	X	X	X	X	X		X			
27	ICCA [2009]	X	X	X	X	X	X		X		X	X	X	X	
28	Park, Wu, Shen, Morrison, & Kong [2014]	X	X	X	X	X	X	X	X			X	X	X	
29	UNWTO and ETC [2015]	X	X	X	X	X	X	X	X	X	X	X	X	X	
	Summary	23	23	21	20	19	16	15	14	12	10	10	8	4	3

Table 2. Cities' competitiveness in the international meetings market – dimensions and categories.

1	2	3	Indicators
City's competitiveness on international meetings market	Economic competitiveness	business potential	Population
			GDP per capita [3]
			Number of firms
			Number of firms with foreign capital
			Organisations& associations [2]
		development potential	Level of investments
			R&D expenditure
			Number of patents
			Population aged 13 and more with higher education [1]
			Number of universities
		accessibility	Number of direct foreign air routes [4]
			Average length of air routes [4]
			Number of rail routes [4]
			Number of passengers at airports
	Tourist competitiveness	accommodation and restaurants	Number of hotels
			Number of 3, 4, 5star hotels
			Number of hotel rooms
			Number of tourists
			Number of foreign tourists
			Number of rented rooms
			Number of rooms rented to foreign tourists
			Number of restaurants
		tourist appeal	Number of monuments 5
			Number of monuments on the UNESCO World Heritage List
			Number of museums
			Number of cinemas
			Number of theatres
	Meetings industry competitiveness	events / meetings	Number of meetings according to ICCA
			Number of meetings according to UIA
			Number of mass events
			Number of participants in mass events
		meeting infrastructure	Meeting facility
			Seats in the biggest room in a meeting facility
			Number of tourist accommodation establishments with conference venues [3]
			Number of conference venues in tourist accommodation establishments [3]
			Number of conference seats in tourist accommodation establishments [3]
		local support	Convention bureau [5]
			Recommended PCO [5]
	Green / Smart competitiveness	safety	Crime rate
			Level of air pollution
		scenery	Green spaces
			Protected natural areas
		climate	Average temperature
			Average cloudiness
			Total precipitation

Data from 2014, exceptions: [1] 2011, [2] 2012, [3] 2013, [4] 2015, [5] 2016

Method

Desk research among Poland's ten biggest cities was conducted to investigate their competitiveness in the international meetings market. They have more than 300 thousand inhabitants each (within the city) and that number is big enough to create potential metropolitan effects. It was assumed that only a city with a sufficient level of development is able to compete in the international meetings market. The analysis was divided into four phases (Table 2). Based on the meeting site selection criteria list compared with the diamond model of competitiveness, the overall city competitiveness is composed of four competitiveness dimensions: economic, tourist, meetings industry, and green/smart competitiveness. Each dimension includes categories and factors.

Economic competitiveness consists of business potential, development potential, and destination accessibility (connectedness). Business potential refers to demand factors – opportunities for associations and companies to win a new market and partners. The second category is linked to a city's ability to develop and high-skilled labour availability. Destination accessibility is mentioned in literature as one of the major determinants of choosing a place to host a meeting. The two remaining categories refer to Porter's factor conditions.

Tourist competitiveness dimension comprises two categories: tourist appeal, and accommodation and restaurants infrastructure. The former includes the number of restaurants, hotels, their standard and capacity, as well as demand for such services. The latter category focuses on various types of tourist attractions: museums, monuments, theatres, cinemas, and sites in the UNESCO's World Heritage List. It is worth mentioning that such places can also play the role of alternative meetings venues.

The meetings industry's competitiveness was defined narrowly as a city's infrastructure and knowledge needed to host meetings. It is divided into three categories: meetings venues and their capacity, local support, and a city's experience in the international meetings market. It can be said that the number of international meetings is the simplest competitiveness indicator in the meetings markets. Being successful in a bidding process means that a city was the most competitive in the aforementioned fields in comparison to other candidates.

Green competitiveness is the last competitiveness dimension. It includes three categories safety, scenery, and climate. The first consists of two components the number of committed crimes and the level of air pollution, as this category is understood as social and ecological safety. The group of climate-related factors includes the most typical variables, influencing the weather. Scenery is represented by green spaces in a city but it should also be understood as a city's overall atmosphere. Nevertheless, it is difficult to find objective and quantitative indicators to measure such factors. For these reasons this research does not offer an indicator related to city image.

Summing up, 45 factors/indicators describing a city's meetings industry competitiveness in the international market were formulated. The research phase was mainly limited by the availability of data sources. Among them, 41 stimulants and 4 destimulants were selected. The data were collected from various sources and the main source was the Central Statistical Office of Poland's database. Depending on the availability, data cover the period from 2011 to 2015.

In the next step all indicators were used to calculate the overall competitiveness index. First, the destimulants were transformed into stimulants. Then, all data were normalised – they were divided by mean value for every factor. Owing to that every result equal 1 means that a

city represents an average level of a particular factor. The competitiveness index was created as a mean value of all indicators and it formed the basis for building an overall ranking of cities and detailed rankings for each field. That means that the created index is a relative measure.

In the next step, a cluster analysis was applied. The aim of this was to search similarities among the investigated cities and therefore the clusters (groups) of similar units were created [Balicki, 2009]. In this research Ward's method was employed, because it is objective, effective, and able to clearly present the results on a dendrogram and because it uses squared Euclidean distance, which enables considering large differences between variables [Balicki, 2009; Błaczkowska & Grześkowiak, 2001; Kaczmarek, 2003]. In the literature statistical indicators could be found to state how many clusters should be created, but researchers' knowledge of a particular topic is the most important [Kaczmarek, 2003]. In the research it was decided to establish the number of clusters' critical value on the 30-cluster level in the Euclidean distance. One weakness of this method is that it does not indicate in which aspects units are similar, therefore results can be interpreted after a descriptive synthesis of data.

Results

According to the results, Warsaw had the highest value of competitiveness index (Table 3). There is a relatively substantial gap between the capital of Poland and the cities, as it reached the highest scores in almost every competitiveness dimensions. Poland's second most competitive city in the international meetings market was Cracow. The fact that its index value is high results from the high level of tourist competitiveness' value. Nevertheless, Cracow is not the greenest city. On the contrary, the green competitiveness is one of the lowest.

Besides Warsaw and Cracow, only Wrocław and Poznań's competitiveness index values balanced around the mean value. Then, the level of Gdańsk and Katowice's indexes appeared to be quite low and below the mean value. However, these cities performed well in such dimensions as green competitiveness and economic competitiveness; however, the other indexes were undervalued. The lowest competitiveness in the international meetings industry was found for Łódź, Szczecin, Bydgoszcz, and Lublin, despite the fact that their green competitiveness index values were overvalued.

Table 3. Competitiveness index – ranking of cities

Rank	City	City competitiveness	Economic Competitiveness	Tourist competitiveness	Meetings industry competitiveness	Green competitiveness
1	Warsaw	2.55	3.02	2.63	2.70	1.23
2	Cracow	1.65	1.10	2.53	1.81	0.86
3	Wrocław	1.02	0.97	1.13	1.03	0.91
4	Poznań	0.97	0.97	0.89	1.04	1.04
5	Gdańsk	0.83	0.79	0.69	0.77	1.30
6	Katowice	0.72	0.97	0.46	0.80	0.60
7	Łódź	0.64	0.58	0.58	0.59	0.92
8	Szczecin	0.58	0.69	0.41	0.40	0.96
9	Bydgoszcz	0.54	0.44	0.29	0.45	1.35
10	Lublin	0.49	0.47	0.38	0.42	0.83

Source: own elaboration

On the basis of cluster method five clusters were identified (Figure 1):

1) Warsaw;
2) Cracow;
3) Wrocław and Poznań;
4) Katowice and Szczecin;
5) Bydgoszcz, Lublin, Łódź, Gdańsk.

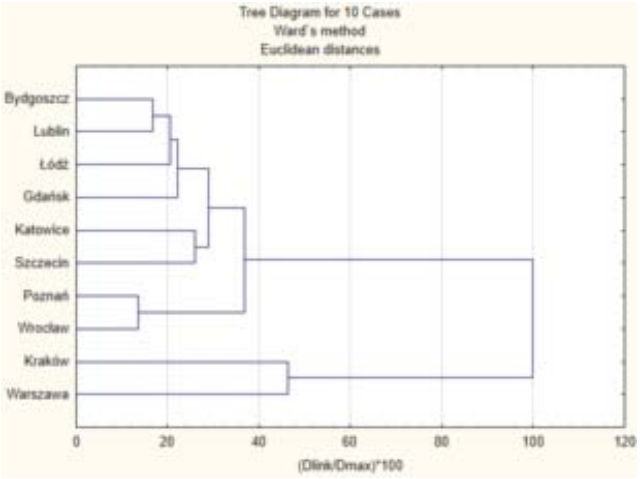


Figure 1 - Dendrogram

The first two clusters comprised a single city. Theoretically, they could be combined with each other as they include the two most competitive cites, but such a cluster is presented in a dendrogram as one of the last connections. Moreover, Cracow recorded more than an average level of competitiveness value in tourism and meetings industry dimensions, but the other dimension values were comparable with the mean value, whereas Warsaw's value was relatively 2.5 times higher than the average level in all dimensions except green competitiveness.

The next cluster consisted of two cities – Wrocław and Poznań. They had similar results approximated to 1 and in two dimensions (economic and meetings industry ones) their values were comparable. Their competitiveness index's structure differed only in terms of tourist competitiveness – Wrocław appeared to be more competitive than Poznań in this respect.

The fourth cluster seemed to be the most heterogenic. It included Katowice and Szczecin, which held the 6th and 8th positions in the ranking, respectively. Both cities' overall index value was below the average level in all dimensions, however, they had similar scores only for tourist potential dimension. It is worth mentioning that Katowice's economic competitiveness index value was on the same level as that for Wrocław and Poznań's and Szczecin's index value was relatively much lower. The opposite was noticed for green competitiveness dimension.

The last cluster consisted of four cities: Gdańsk, Łódź, Bydgoszcz, and Lublin. All of them represented a similar structure of competitive index values in the international meetings market. The index values of three dimensions (economic, tourist, meetings industry) were on the comparable levels but the green competitive index value was higher than the others.

Findings and discussion

The results of the study revealed that Warsaw had the strongest competitive potential in the international meetings market. Moreover, Warsaw, competitiveness' structure is the most stable and sustainable as every dimension of the city's competitiveness index was assessed on the high level. It can be concluded that only a city which is strong in every aspects of its development potential – and not only with a substantial amount of meetings and accommodation infrastructure – is able to gain a steady competitive edge in the international meetings market, confirmed by the high number of meetings hosted. However, the example of Cracow showed that the competitive advantage can be built on the basis of the city's tourist appeal. Nevertheless, the strategy is also determined by the high level of meetings infrastructure development.

The literature review as well as the research results presented in the previous sections of the paper make it possible to incorporate site selection criteria used in bid processes with the overall framework of destination competitiveness approach proposed by Porter [1990]. Moreover, the possibilities of measuring competitiveness were verified from the meetings industry point of view (Figure 2).

As far as a city's meetings industry competitiveness is concerned, Porter's factor conditions consist of the majority of site selection criteria. Specialized infrastructure, i.e. meeting facilities and transport infrastructure ensuring accessibility in the inter-city network is necessary to organise a meeting. High-qualified staff and local capital are needed, too, to create, develop, and promote local industry products. The number of meetings organised in a city is a measureable outcome. Moreover, factor conditions in the meetings market can be measured by such categories used in the research as: meetings infrastructure, accessibility.

Nevertheless, support from a local government unit and other institutions like e.g. convention and visitor bureau, play a crucial role in forming the competitiveness of the local meetings industry by advocating and featuring a city in the international market. It is also a measureable category used in the presented research as part of meetings industry competitiveness dimension.

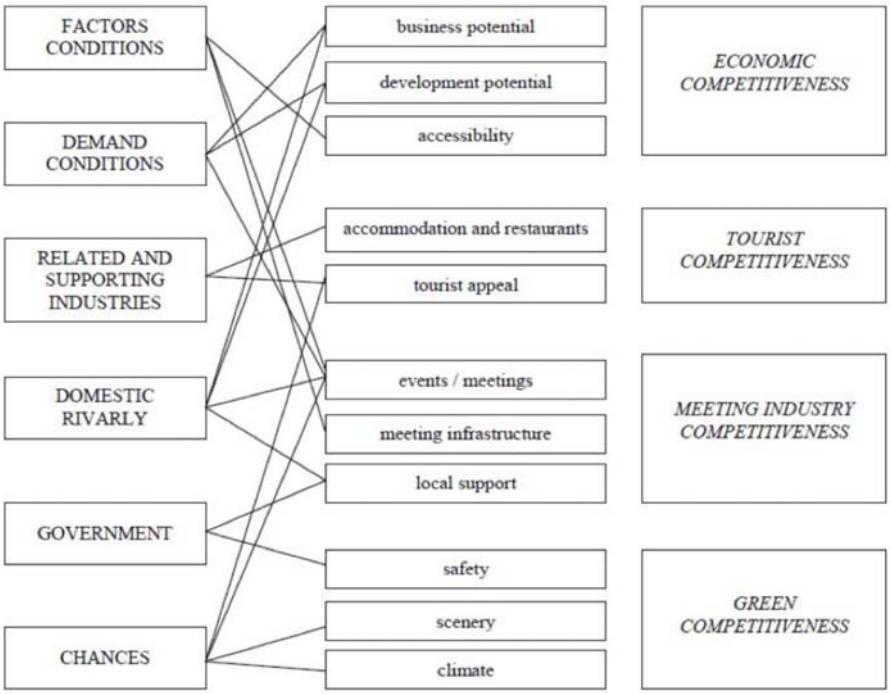
Because of complexity of a city's meetings industry product, the competitive advantage is significantly determined by related and supporting industries. Although the strength of their impact depends on a kind of meeting [see Davidson, 2001], the most important are accommodation, restaurant/catering facilities and shopping facilities. However, only the last indicator could not be measured. Instead of this, it is possible to measure more supporting elements included in tourist competitiveness dimension in the study.

The meetings industry's demand conditions can be understood twofold, in relation to domestic demand for products and services offered by local entrepreneurs (i.e. how many meetings and other events a city hosted; how many participants took part in them, how high their expenses were, etc.), and in relation to business-making opportunities related to a given meeting (e.g. what are the chances of recruiting new members or creating new business relationships or entering a new market, etc.). These factors could be indirectly included in the business potential category and development potential category (which were both parts of economic competitiveness dimension).

Another competitive factor in Porter's model are a firm's strategy, structure and rivalry. It can be stated that the real potential of this factor is tested during the bid process, as all

public and private stakeholders must cooperate to create and deliver a competitive offer of a city. Moreover, overall political, economic conditions are important.

The meetings market operates in the international level and that is why occurrences that are outside of control of firms representing this industry are a substantial factor of city's competitiveness. These elements are safety (which is also a government's responsibility), climate, city and country's tourist appeal and destination image. Some of these elements can be measured using indicators collected in the green competitiveness dimension in the study.



Nevertheless, it can be stated that to a certain extent the bidding process is a mix of competitive resources (representing by other factors), good presentations and chance itself. Sometimes winning and consequently hosting an important and recognizable meeting can push a city into 'upper league' of this high competitive and international game and foster a local industry's development. On the other hand, losing the bid battle can result in fewer key stakeholders and the decline of local partnership.

Conclusion

The results of the study reveal that the international meetings market must be seen as an unique industry not only because it involves territorial units as competitive actors on this market compete on the same conditions as private organisations. This is also the market where cities' ability to compete is constantly verified in practice, i.e. in such a direct and short-term way, by making them participate in bid contest. That is why the international

meetings market could be treated as an on-going city competition. Moreover, such competitiveness can be measured using the city's index of competitiveness on the international meetings market created from the site selection criteria used by main host organisers (i.e. associations and corporations) incorporated into the diamond of the competitiveness framework.

However, limitations of the presented study must be discussed. First, competitiveness of only ten cities from one country was assessed. Second, the authors faced the lack of data concerning important factors in the meetings market such destination image, shopping facilities, terrorist threat etc. Third, the data representing different years were used in the study.

Implications for further research could also be proposed. The research could be strengthened by creating cities new competitiveness structure based on e.g. Analytical Hierarchy Process (AHP). It is also important that the study should be verified using the international scope corresponding with meetings industry impact.

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