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COMPETITIVENESS OF POLISH CITIES AT EUROPEAN TOURISM MARKET

The article presents results of measuring competitiveness of Polish cities at European tourism market. First, competitiveness concepts derived from microeconomic and macroeconomic approach are described. Then, the methodology of measuring cities' competitiveness is presented, which is mainly based on the demand and supply indicators. Finally, the competitiveness analyses is carried out. The research results show that the competitiveness of Polish cities at European tourism market is not very high, measured both by the value of the synthetic indicator and particular detailed criteria. It is international research orientation that reflects the actual competitive potential of a city and a wide horizon of perceiving competitors regains a natural development perspective.

Keywords: *tourist competitiveness, cities competitiveness, competitiveness indicators, Poland.*

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КОНКУРЕНТОСПРОМОЖНІСТЬ ПОЛЬСЬКИХ МІСТ НА ЄВРОПЕЙСЬКОМУ ТУРИСТИЧНОМУ РИНКУ

У статті представлено результати оцінювання конкурентоспроможності польських міст на європейському туристичному ринку. Описано поняття конкурентоспроможності на мікро- і макрорівнях, представлено методологію вимірювання конкурентоспроможності міст на основі показників попиту та пропозиції, здійснено аналіз конкурентоспроможності. Результати дослідження показали, що конкурентоспроможність польських міст на європейському туристичному ринку не дуже висока як в цілому, так і за окремими критеріями. Фактичний конкурентний потенціал міст виявляється в міжнародному порівнянні і передбачає природну перспективу розвитку.

Ключові слова: *туристична конкурентоспроможність, конкурентоспроможність міст, показники конкурентоспроможності, Польща.*

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КОНКУРЕНТОСПОСОБНОСТЬ ПОЛЬСКИХ ГОРОДОВ НА ЕВРОПЕЙСКОМ ТУРИСТИЧЕСКОМ РЫНКЕ

В статье представлены результаты оценивания конкурентоспособности польских городов на европейском туристическом рынке. Описано понятие конкурентоспособности на микро- и макроуровнях, представлена методология измерения конкурентоспособности городов на основе показателей спроса и предложения, осуществлен анализ конкурентоспособности. Результаты исследования показали, что конкурентоспособность польских городов на европейском туристическом рынке не очень высока как в целом, так и по отдельным критериям. Фактический конкурентный потенциала городов выявляется в международном сравнении и предусматривает естественную перспективу развития.

Ключевые слова: *туристическая конкурентоспособность, конкурентоспособности городов, показатели конкурентоспособности, Польша.*

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Introduction. Globalization, understood as the increasing integration of economies, societies, and civilizations (Hjalager, 2007), is regarded as a decisive driving force that shapes the tourism industry and influences its development. It is referred to as both an environment and an agent of many processes and aspects which occur in the tourism industry: first of all, increased competition between enterprises and destinations, but also changes in the world tourist demand and supply structure and consumer behavior, activities of transnational tourism corporations, weakening of state control, innovation, impact of ICT and social media, the security of demand and supply etc. (Bianchi, 2002; Buhalis, 2000; Hjalager, 2007; Theuns, 2008; Williams and Shaw, 2010). On the other hand, tourism is seen as a form and a determinant of globalization (Meethan, 2001) — it constitutes one of the most significant global trade flows; it has been also recognized as a major area of export activity and a great contributor to balance of payments in many countries (Fayed and Fletcher, 2002). That is why Hjalager (1997, p. 438) states that tourism is both a cause and a result of globalization.

Globalization of tourism has also made cities become important players at this market, reinforcing their bargaining power and restructuring their economies (Zmyslony, 2012). Cities, which have become main hubs of new global resources: knowledge, innovation, information flow, skilled labor force, relationships, motivation, financial services and specialized services for companies (Porter, 1998; Sassen, 2006), have also become the most attractive and most frequently visited destinations (Law, 2002). Not only are they the biggest historical and cultural centers and the places of creation of new forms of recreation and tourism (Aleksandrova et al., 2011), but they are also entertainment machines, as they have developed infrastructure adapted for consumption and spending free time (Clark, 2003).

Under these conditions — paraphrasing Hall (1998) and Meethan (2001) — even local urban centers are international actors in tourism that now functioning at the global market, regardless their location. Therefore, it is particularly important to examine their competitiveness.

Because of the nature of tourism, defined and isolated as a part of the global economy according to the demand criterion (i.e., from the point of view of the recipient of the economic process), and not according to the supply criterion (from the point of view of an economic subject), the competing process is of particular significance at this market. This means concentrating on the tourist as both an indirect and final subject in competition whose expenditure incurred in a city brings economic benefits. In the recent years the tourism industry has seen an extension of how competitiveness can be assessed: from traditional competitiveness factors (the volume and quality of core resources) to the so-called intangible factors relating to cultural, social and institutional environments, such as cultural heritage, image, and social openness (Dziembowska-Kowalska, Funck, 1999; Dolegowski, 2002).

The paper presents the results of measuring competitiveness of Polish cities at European tourism market. They provide a current picture of the competitive position and potential of Polish urban tourism. The indicator method that the paper proposes is based on current concepts and general models created for the needs of macro- and mesoeconomic levels. The research has been based on secondary sources, mainly statistics from Urban Audit published by Eurostat, which determines its spatial extent.

Literature review: regional competitiveness in tourism. In literature on tourism economics competitiveness refers to various degrees of aggregation, i.e. a single product, a single enterprise, a kind of economic activity, a city, a region, an industry as well as the whole national economy. In order to meet competition, a subject should concentrate its activity on gaining a competitive advantage in a particular area or filling competitive gaps, i.e. adapting to their competitors. There are relatively many concepts and methods of examining competitiveness which can be divided into two groups considering their economic origin.

The first group of competitiveness concepts is of a microeconomic origin and stems from corporate management theory. What they have in common is the assumption that it is necessary to assess competitiveness with the reference to competition between entities itself, and not to more general phenomena that contribute to social and economic development (Krugman, 1994; 1996). These theories can be regarded as classic ones, i.e. as those that approach the ideas of competition and competitiveness in a coherent way and as those that in a way preserve their original meaning, including the etymological one. Among other things, the concepts stress the importance of indentifying direct competitors (Enright, Newton, 2004) and defining the object and subject of competition (Nawrot, Zmyslony, 2009; Nawrot, 2012), even if it concerns regions and cities. This approach makes it possible to assume that competitiveness is a relative feature, and not an absolute one.

In their empirical approach Enright and Newton (2004) suggest that competitiveness be assessed on the basis of indicators which they isolated after analyzing the relevant literature and which they used to assess the competitiveness of Hong Kong against its biggest competitors: Singapore, Bangkok, Tokyo, Shanghai, Beijing, Taipei, Sydney, Kuala Lumpur, Manila and Jakarta. Based on the primary research into supply they propose 2 groups of competitiveness-specific factors: one that comprises 15 tourism-specific factors (which they call "attractors") and the other made up of 37 generic business factors (called "business-related factors"). One weakness of the concept is that it does not consider demand factors, i.e. the volume of visits and the size of visitors' expenditure. As a result, the researchers only assess the conditions that a city creates for tourists without checking how this influences the competition process.

Another approach to the competitiveness of spatial entities is the one presented by Nawrot and Zmyslony (2009). It is based on the system of competitiveness of a tourist region and the assumption that a city (or a region) functions in an open system from the point of view of the tourism market, which means that analyzing its competitiveness should have an international dimension. In addition, cities can compete both indirectly and directly at the tourism market. Indirect competition consists in the creation of environment conditions for subjects operating in tourism business, whereas direct competition of tourist regions means cities competing with one another for various benefits (Jedrzejczyk, 2003; Klamut, 1999; Markowski, Stawasz, 2001). Following that, measures of competitiveness concern the following phenomena and factors: tourists being attracted to a region, investors being attracted to a tourist region, an appropriate offer being created for tourists, appropriate conditions being created for existing businesses, i.e. investors in a tourist region. Depending on the existing source data, it is possible to assess competitiveness of these regions both using

quantitative and qualitative indexes that refer both to tourist demand and tourism supply entities. The concept extends the theory by Enright and Newton (2004) by the supply side and is the basis for creating a methodology of measuring city competiveness in this paper.

The other group of theories of competitiveness in tourism is based on the general concepts created for the macroeconomic level, i.e. in the relation to the whole of national economies. The theories are described in Gooroochurn and Sugiyarto (2005), Hong (2010), Ritchie and Crouch (2003), Vanhove (2005) and Zemla (2010). All these concepts are more or less directly based on the Diamond of National Advantage model by Porter (1990), which explains the nature of international competitiveness of nations and is subsequently adapted to the nature of the tourism industry. The most often cited theory is the model of destination competitiveness by Ritchie and Crouch (2003), according to which competitiveness and sustained development largely depend on several dozen factors divided into 5 groups: supporting factors and resources, core resources and attractors, destination management, destination policy, planning and development, qualifying and amplifying determinants. All these factors are determined by microenvironment mainly in comparative advantages and global environment in the field of competitive advantages. The scope of the analysis proposed in this model is so wide that it in fact refers to not so much competitiveness itself, but to sustainable development, or even a widely understood, social and economic development of an area.

Gooroochurn and Sugiyarto (2005) are the authors of Tourism Competitiveness Monitor [TCM], which is based on widely available published statistical data that can be used to create transparent competitiveness indexes and to compare countries objectively with reference to tourism. Its main result is tourism competitiveness index, which is the resultant of the following thematic areas: human tourism index (HTI), price indicator, infrastructure indicator, environment indicator, technology indicator, human resources indicator, openness indicator, and social indicator. It needs to be stressed that TCM has been created for a national level, which means that it is difficult to use it to assess competitiveness of smaller spatial entities because of the lack of appropriate statistical data.

A concept which goes beyond the Diamond of National Advantage by Porter, yet still being of macroeconomic origin, is the one by Dwyer, Kim, Livaic and Mellor (2004), who assess tourism competitiveness of two countries: Australia and South Korea with the reference to the resource-based theory. They stress the importance of natural and anthropogenic resources that are part of a country's heritage and are important to tourists. If they are properly managed on governmental and entrepreneurial levels, they have impact on the competitiveness of a country. The idea of tourist competitiveness that is of micro- and macro- origin is presented by Kozak (1999), who highlights its two crucial areas: factors affecting destination competitiveness and indicators of destination competitiveness, which can be used to assess competitiveness. An advantage of the concept is the selectiveness elements that may influence competitiveness and the separation of competitive resources from the effects of competition. The author proposes the following indicators to assess the actual level of competitiveness: the volume of tourist arrivals, the volume of repeat tourists, the volume of tourism receipts, and the

share of tourism receipts in GNP. Not all the indicators, however, can be applied to cities and that particularly concerns the share of tourism in national income, in which case the regional tourism satellite account (Dziedzic, 2003; WTTC, 2012) should be used.

Because of their macroeconomic origin, the presented concepts of measuring competitiveness necessitate using elaborate and diversified research tools. The multitude of indicators, criteria and procedures and in many cases their vagueness make it totally impossible to implement these models on the city level. The approaches to assessing competitiveness in tourism described above differ in relation to their degree of applicability (or in other words – the generality of the discussion) and to the diversity of the source data used. To exemplify, methods by Enright and Newton (2004) and Kozak (1999) rely on primary sources (research into expert opinions or into tourists' perception), and concepts by Dwyer, Kim, Livaic and Meller (2004) and Gooroochurna and Sugiyarto (2005), in turn, are based on using the secondary data published in various sources.

Methodology of research. For the purpose of assessing the competitiveness of Polish cities it has been assumed that it is a relative and measurable phenomenon; therefore, it can be assessed with reference to other cities by means of measurable and objective number data, and not to the opinions of particular groups of respondents, which means accepting the international dimension of competitiveness. The research is limited to analyzing static competitiveness, i.e. the competitive position (the demand side) and the competitive potential (the supply side). Moreover, it is assumed that the general tourist potential of each city is a component of various primary, secondary and result resources whose significance depends on served markets; therefore, it is necessary to isolate indicators describing competitiveness both from the point of view of both business and cultural tourism, which are two main markets for recipients of a city's offer.

In addition, a narrow scope of research into competitiveness is assumed, i.e. with reference to basic elements of tourist development and tourist valorizations. That means omitting factors which do not create tourist potential directly but which still influence a city's attractiveness (e.g., municipal authorities' policy, level of other social services and ICT infrastructure, tax systems, foreign exchange rates etc.). However, referring to the heterogeneity of tourism one needs to remember that many factors influencing the final competitive position of cities at the tourism market can be reflected in other areas, such as economy, life quality, sports, management or social capital. In order to analyze tourist competitiveness in the widest possible scope all of these would have to be taken into consideration, but the paper is not designed to address these issues.

The research is based mainly on Urban Audit statistics published by Eurostat (2010) in order to obtain a reliable and objective data. The availability and reliability of the data published in this database determined both the spatial scope (EU countries) and the subjective scope (the number of cities for research). Additional data sources useful in creating certain indicators were the data and the rankings published by specialist international organizations such as World Heritage List by UNESCO (2010) and the ranking of international business meetings published by International Congress & Convention Association (ICCA, 2011).

It is very important to illustrate each competitiveness aspect with at least one indicator and to refer the aspects to cities' administrative areas (the so-called cores), and not to their metropolitan areas. The collected data concern the year 2008 (this also relates to the cities included in international documents) excluding the data referring to the number of international meetings and UNESCO monuments, which concern 2010.

The following competitiveness criteria were accepted:

— The number of overnight stays per 1000 inhabitants — basic demand indicator;

— The number of international meetings per year according to ICCA — supplementary demand indicator referring to the business tourism market;

— The number of beds per 1000 inhabitants — basic supply indicator;

— The number of museums per 1000 inhabitants — supplementary supply indicator referring to the cultural business market;

— The number of monuments on the UNESCO World Heritage List — supplementary supply indicator referring to the cultural business market.

The collected statistical data were used to create the competitiveness criteria (indicators) mentioned above. Since they are expressed in different measures, they were standardized by means of the quotient transformation method, referring their particular values to the fixed model which is the average value of an indicator for a set of analyzed cities to enable comparison among them. The location quotient shows a surplus or a shortage of the importance of a city in a particular area. In this respect the value of a criterion equal to one corresponds to the average value of an indicator for a particular group of cities, deviations above one mean a competitive position higher than the average, whereas deviations below one mean a weaker competitive position. Moreover, the synthetic indicator of city tourist competitiveness was calculated, which was the arithmetic average of particular criteria.

The authors' intention was to obtain the widest possible range of cities to compare, but they main problem was the limited and unreliable tourism statistics. After initial analysis of the state of data in the Urban Audit database it turned out that it was possible to assess competitiveness of only 4 Polish cities with more than 300 ths inhabitants: Gdansk, Poznan, Szczecin and Wroclaw. In addition, because of the incompleteness of statistical material it was not possible to ensure the same representative character of cities to be compared for all the indicators that had been singled out. However, there were quite a lot of shortages when it came to all the selected criteria. For this reason the number of cities equal to 40, which was originally accepted for the sake of research, was maintained only for the UNESCO Heritage list sites. In other cases it is diversified, whereby the least value is assumed for the second competitiveness indicator. In total, research into competitiveness on the basis of the synthetic indicator was carried out for 21 cities.

The research was carried out alongside the project "The Competitive Position of Poznan and its Agglomeration Against a Network of National and European Metropolis" coordinated by the Metropolitan Research Centre at Adam Mickiewicz University in Poznan in 2011.

Research results: Polish cities at European tourism market. When it comes to the basic criterion relating to the competitive position at European tourist market — the

number of overnight stays per 1000 inhabitants — Polish cities rank in further places (Fig. 1). The value of the indicator stands below 60% of the average calculated for 23 European cities, for which it was possible to gather appropriate statistical data. To be more specific, it stands at 59% for Gdansk, 54% for Wroclaw, 45% for Poznan and 42% for Szczecin. The value of the indicator that considerably exceeds the average is registered in: Lisbon, Frankfurt am Main, Dresden, Dusseldorf, Gothenburg, Oslo, Tallinn and Stuttgart. Considering the size and character of tourist mobility, it may be said that almost all of them — apart from Lisbon — can be benchmarks for Polish cities. It needs to be stressed that Polish cities come ahead of two Eastern European destinations: Tallinn and Bratislava. These two being capitals means they have a certain competitive advantage at the tourism market which is worth maintaining.
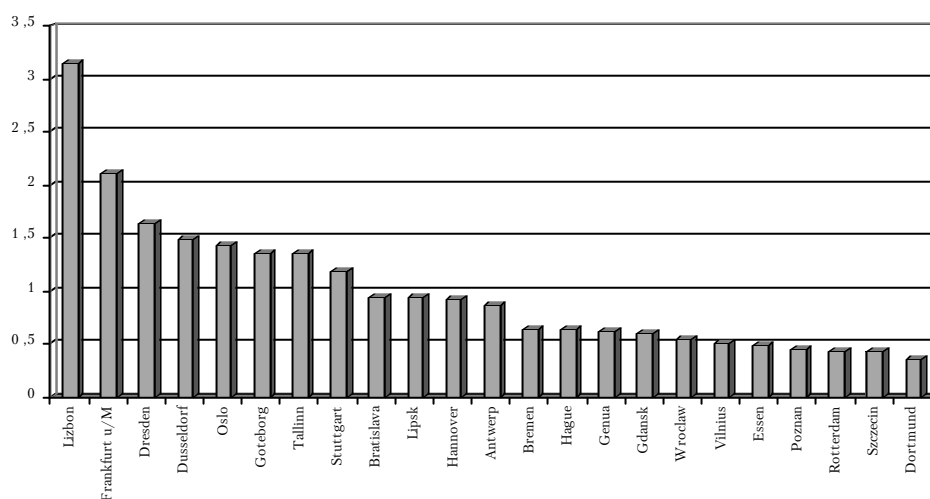

Source: Urban Audit, Eurostat 2009
Figure 1. **The number of overnight stays per 1000 inhabitants**

It is worth making use of other published rankings when analyzing the general competitive position at the tourism market. According to Euromonitor International (2009) London is visited by over 14 mln. tourists, which makes it the most visited city in the world in the Top City Destinations Ranking. It is followed by Bangkok and Singapore. Sofia, Montreal and Palma Mallorca with almost 1.2 mln visitors are at the bottom of the Top 100 list. It can be added for comparison that the only cities that qualify to be on such a list is Warsaw with about 2.2 mln visitors and Cracow with 1.1 mln visitors, for which no information was available in Urban Audit.

When it comes to the supplementary indicator specifying the competitive position of Polish cities and relating to the business tourism industry, the position of Polish cities is becoming even worse (Fig. 2). Poznan's strong position at the domestic business tourism market does not translate into an adequate position at European market. In 2010, 9 international meetings were held in Poznan. The number stands at 39% of the average number of meetings (23) organized by the cities included in the ranking. In Wroclaw, in turn, 8 meetings were organized (35% of the average).

Even when stringent criteria according to which ICCA categorizes meetings are taken into account, it needs to be observed that the low competitive position may result from cities' low attractiveness at the business meetings market, but also from not enough action being taken by their authorities and specialist city agencies in order to attract such events. The city that ranks the highest is Lisbon with 106 organized meetings. Moreover, more than 46 meetings were held in Oslo, Edinburgh and Helsinki, which is 200% of the average number. As far as Eastern European cities are concerned, two cities stand out: Tallinn and Vilnius, which rank higher than the average value of the indicator in this respect. Another city with a position better than that of Polish cities is Bratislava with 44% of the average.
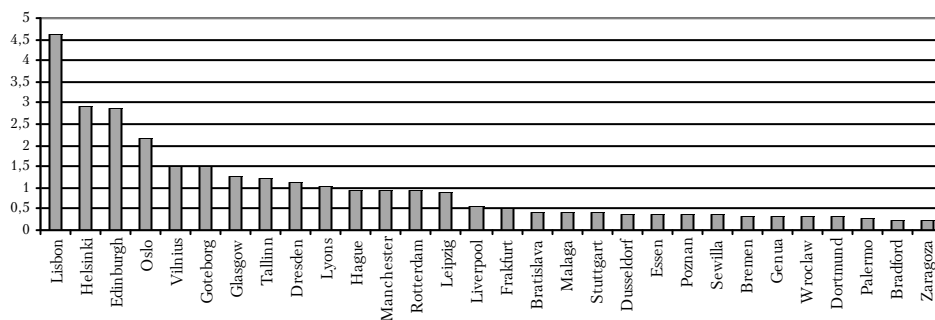
Source: ICCA 2011.
Figure 2. **The number of international meetings per year according to ICCA**

A better, but still low, competitive position of Polish cities against their competitors can be observed in relation to the resources potential (Fig. 3) measured using the number of beds per 1000 inhabitants. One exception is Gdansk, for which the value of the indicator oscillates around the average value calculated for 21 considered competitors (97%). The value of the indicators for other cities was approximately halved: it amounted to 57% of the average for Poznan and exactly 50% for Wroclaw and Szczecin. The highest resources potential was registered in Lisbon, for which the value of the indicator amounts to almost 294% of the average. The difference shows the gap between the researched Polish cities and the most frequently visited European cities and undoubtedly the capital of Portugal is one of them. Out of 21 cities shown in the graph, only 3 cities rank lower than the Polish ones.
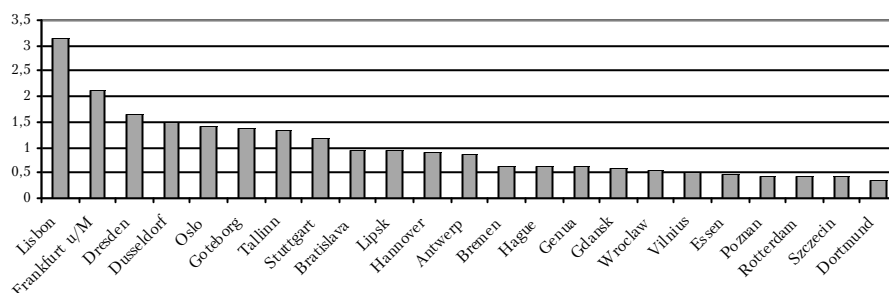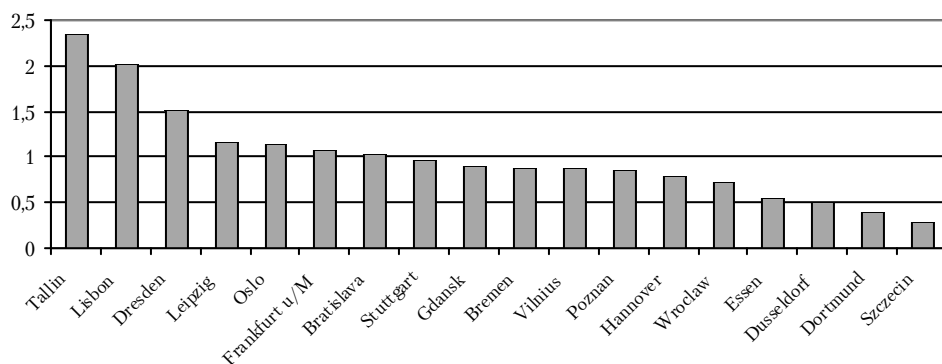

Source: Urban Audit, Eurostat 2009
Figure 3. **The number of beds per 1000 inhabitants**

The resources potential in the cultural tourism market can be defined on the basis of two criteria: the number of monuments on the UNESCO World Heritage list (since the indicator has a binary nature, it is not shown graphically) and the number of museums per 1000 inhabitants (Figure 4). Polish cities have a low potential also in this respect. Out of 40 cities subject to research, 14 have a competitive advantage having a unique monument or a complex of monuments which are internationally protected (none of these cities is registered on the list twice). One of them is one of the 4 Polish cities, Wroclaw, which has an Expressionist indoor sports and entertainment arena called HalaStulecia, built between 1911 and 1913 and designated as the World Heritage Site in 2006. Gdansk, Poznan and Szczecin belong to the group of 26 cities which do not have so high-class monuments.

When it comes to the number of museums (Fig. 4), Polish cities have relatively large potential in the international dimension (and also the highest values in all the categories of indicators). For 3 of them, the value of the indicator amounts to at least 70% of the average calculated for the 18 cities subject to research. Gdansk ranks at the top (91%), followed by Poznan (86%) and Wroclaw (73%). At the same time, as far as the number of museums is concerned, Szczecin has relatively the lowest competitive potential and comes last (28% of the average), which affects the high potential of Polish cities mentioned above. When the value of the indicator of the remaining cities is taken in account, it is possible to notice that this is the only category for which Lisbon has lost its leading position. The city that comes first in the category is Tallinn, for which the value of the indicator amounted to 234% of the average.

Source: Urban Audit, Eurostat 2009
Figure 4. **The number of museums per 1000 inhabitants**

The presented contributing competitiveness indicators can be summed up in the form of a synthetic indicator which makes it possible to assess the general competitiveness position of the cities in relation to international tourism. It has been calculated for only those cities for which it was possible to obtain 4 contributing factors. The number of cities in this case amounted to 21. As data in Fig. 5 show, the value of the indicator for Polish cities is not high. When the data are analyzed in detail, it can be said that on average the value of the indicator is low for Gdansk and Wroclaw – 59% and 54% of the average respectively. As for the 2 remaining cities the level of the indicator is explicitly low – it stands at 45% of the average for Poznan, and 42% of the average for Szczecin.
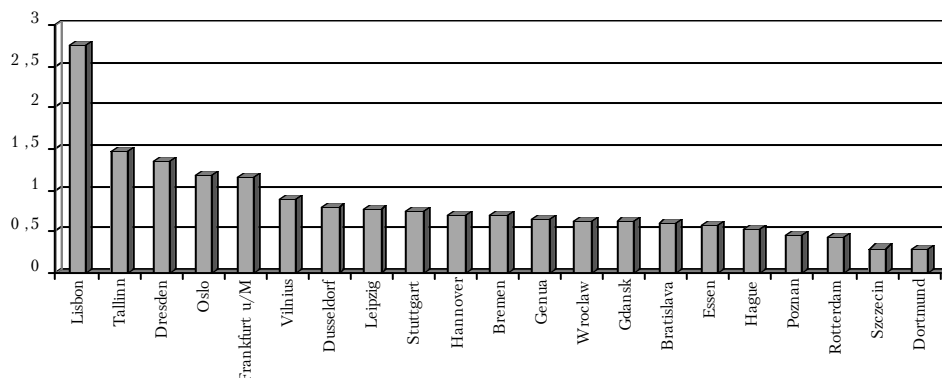
Source: Urban Audit, Eurostat 2009.

Figure 5. **Tourist competitiveness of cities – synthetic indicator**

Conclusions. The conducted research clearly shows that the competitiveness of Polish cities at European tourism market is not very high. This is borne out both by the value of the synthetic indicator and the results of particular detailed criteria. It can be noticed that competitiveness is higher with reference to the resources potential than with reference to competitiveness position (assessed by means of demand indicators). Out of the 4 researched cities Gdansk comes first and Szczecin last in detailed and synthetic rankings. It needs to be stressed here that the research did not include popular cities such as Warsaw and Cracow, and other big ones such as Bydgoszcz, Katowice, Lublin, Lodz and Rzeszow because of the limited statistical material. On the other hand, the same reasons made it impossible to assess competitiveness of many other European cities. The research was also limited by a partial objective scope reflected in certain competitiveness indicators. In addition, it needs to be pointed out that using secondary data cannot create a full picture of competitiveness for objective reasons, which is mentioned in the literature review section.

It can be inferred from the conducted research that the basis challenge that Polish cities face as far as raising their competitiveness at the tourism market is concerned is to increase the volume of international tourist flows. The city tourism market is currently international and it should serve as a reference for building and assessing their market position. The domestic market, which is dominant concerning the availability of public statistics, should be treated as one of the essential segments of the international market. Contemporary domestic tourists are in fact consumers that have international experience, which means they have the same requirements and expectations as foreign visitors. Assessing a city's competitiveness potential and tourism management at an international level is related to a relative decrease in its competitive position and potential.

It is international research orientation that reflects the actual competitive potential of a city and a wide horizon of perceiving competitors regains a natural development perspective. This means that all activities in the tourism industry should be performed with the view of aiming at raising one's competitiveness in the international dimension. It can be said that currently cities are increasingly competing with one another in the area of creating new spaces and objects, which aims at providing their inhabitants with more leisure options. The greatest competitive advantage in this

respect is enjoyed by huge metropolis which can boast this type of objects and infra-
structure and which have the biggest potential when it comes to financing big invest-
ments. Building state-of-the-art museums and theme parks, organizing huge events
and reviving whole quarters and districts are popular tools that help raise a city's com-
petitiveness, to name just a few of them. Cities are constantly diversifying their tourist
offers providing their inhabitants with new possibilities of spending free time. They
are also reviving and enhancing their classic tourist attractions. In order to raise a
city's competitiveness, Polish city authorities must bear in mind that they are taking
part in an endless competition for tourists and their expenditure.

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