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OPPORTUNITIES AND LIMITATIONS FOR MICE TOURISM DEVELOPMENT IN ŁÓDŹ¹

Abstract: Business tourism plays an important role in the tourism industry of Łódź. However, compared to other Polish cities relatively few MICE meetings are organised there. The purpose of this article is therefore to analyse the opportunities and limitations for MICE tourism development in Łódź compared to the city's potential. The accommodation services, congress locations, accessibility by different means of transportation, and its image are the factors considered in the analysis. The results indicate the most important strategic actions that are recommended in order to improve the situation of business tourism in Łódź.

Keywords: MICE, Łódź, business tourism, accommodation services and congress locations, image.

1. INTRODUCTION

Business tourism has a relatively short history in the United States and Europe, dating back roughly sixty years while in other parts of the world this history is even shorter (*Metodologia badań...*, 2003). In recent years, the pace of change in this tourism sector in Poland has been very dynamic. The main reasons are the political and economic transformations which have occurred in Poland after 1989 (*Metodologia badań...* 2003) and Poland's accession to the European Union in 2004 (UNWTO 2006). These events led to a huge increase in the number of tourism trips that directly and indirectly affect the economic development of Poland. The tourism industry has begun to play an important role in the creation of new work places and therefore influences the economic-business competitiveness of cities and regions. In the era of globalisation, large urban centres have become the main beneficiaries and create most demand for the dynamically growing tourism industry, including business tourism (PCB 2015).

The aim of the article is an analysis of the selected factors influencing the development of MICE tourism

in Łódź. Based on the analysis, the authors distinguished the most important strategic activities aimed at increasing the attractiveness of the city in the business tourism sector. Among different demand and supply factors (SWARBROOKE & HORNER 2001) the authors selected the following: congress location and accommodation services, transportation connections and accessibility, and the city's image. The term image should be understood as the outside perception of the city, perception by its residents, and the promotion of the city as a place for MICE events. These factors were juxtaposed with the potential for the promotion of Łódź's industrial heritage. This, appropriately managed, could become Łódź's distinguishing feature compared to other urban centres in Poland.

For the purpose of this study, we analysed available business tourism reports and conducted statistical reviews of congress locations and hotel services in the city. Desk research has been supplemented with field study. The spatial distribution of conference locations and hotels was conducted in a GIS environment.

2. MICE TOURISM

In the available literature, a wide range of different definitions of MICE tourism can be found. One of those most directly related to business tourism is the definition provided by Rob Davidson (1994) which states that "business tourism is concerned with people travelling for purposes which are related to their work" (MEDLIK 1995) defines business tourism trips as those "made by employees and others in the course of their work, including attending meetings, conferences and exhibitions". MICE tourism, a part of business tourism, is an acronym: "Meetings", "Incentives", "Conferences" and "Exhibitions". MICE is used in relation to the type of tourism where large numbers of people are purposely connected to each other in advance via well-planned events focused around a specific topic. Published by the International Association of Professional Congress Organizers (IAPCO) in collaboration with the Commission of the European Communities (CEC), the Meeting Industry Terminology book serves as a dictionary for this segment of the industry:

- Meetings - the act of gathering several people in one place, to confer or carry out a particular action. The frequency of meetings may depend on the needs of the moment or occur periodically in an established form such as general meetings, committee meetings, etc (CEC & IAPCO 1992).
- Incentives - a motivating event included in the program which is offered to participants as a reward for efficient work. Apart from clients and contractors, incentives may also focus on employees' families (CEC & IAPCO 1992).
- Conferences - meetings during which participants hold consultations or discussions leading to the establishment of facts or solving problems. Compared to congresses, conferences are organized usually on a smaller scale. Specialists are gathered to facilitate the exchange of information on a specific topic. The term 'conference' has no specific connotation regarding frequency.
- Exhibitions - events during which products and services are exhibited or presented (CEC & IAPCO, 1992).

3. DETERMINANTS OF MICE TOURISM DEVELOPMENT IN ŁÓDŹ

The results of annual surveys of tourists in Łódź prove that business tourists constitute the most numerous group (WŁODARCZYK 2012). The development of

tourism depends on tourism potential which can be defined as the conditions necessary for its development in an area (PAWLICZ 2008). The activities necessary to create a strategy for MICE development consist of tourism potential analysis, its objective assessment and the identification of business tourism development factors (LEŚNIEWSKA, MOTERSKI & ŻEK 2012).

According to E. NAWROCKA (2013) the most important factors in the development of business tourism include tourist attractiveness, higher education and research institutes, a diverse cultural offer, sports and recreation facilities, good transport accessibility, a high standard of tourist accommodation and congress locations.

Infrastructure is the basic requirement in the planning process of MICE events. Transport accessibility, quality of hotel services and the capacity of congress facilities are elements constituting a competitive advantage of one destination over another. Cities compete with each other to become destinations of great events and the arrival of guests. Some urban centres can build their advantage on specific conditions associated with their location (e.g. Gdańsk), with history (e.g. Kraków), with administrative function (e.g. Warsaw). Łódź, despite its central location and rich industrial history, seems not to be able to take advantage of its potential in developing a strong business tourism sector.

3.1. CONGRESS LOCATIONS AND ACCOMMODATION SERVICES

Business tourists have high requirements compared with other groups and this applies to both the type of expected service and its quality. Business visitors mainly decide to stay one or more days in relation to a specific event in a given city. Due to limited time, it is vital for such clients to be provided with comfortable accommodation, access to a restaurant and proximity to the place of the meeting, the railway station or the airport. These kinds of amenity and high quality service are the most appreciated. According to the report by the Institute of Tourism and *Activ Group* in 2012 every tourist who comes to Poland for business spent an average of 415 USD. A business visitor spends from 10% to 45% more than a tourist arriving for health or recreational purposes. Business tourists are also the only group whose expenses in 2012 increased relative to the previous year.

The most important element of infrastructure for MICE tourism are the meeting places - convention centres, conference rooms and halls, trade fairs and exhibitions centres. Due to the fact that the meeting is the direct motive, the capacity and quality of such facilities are extremely important. When choosing

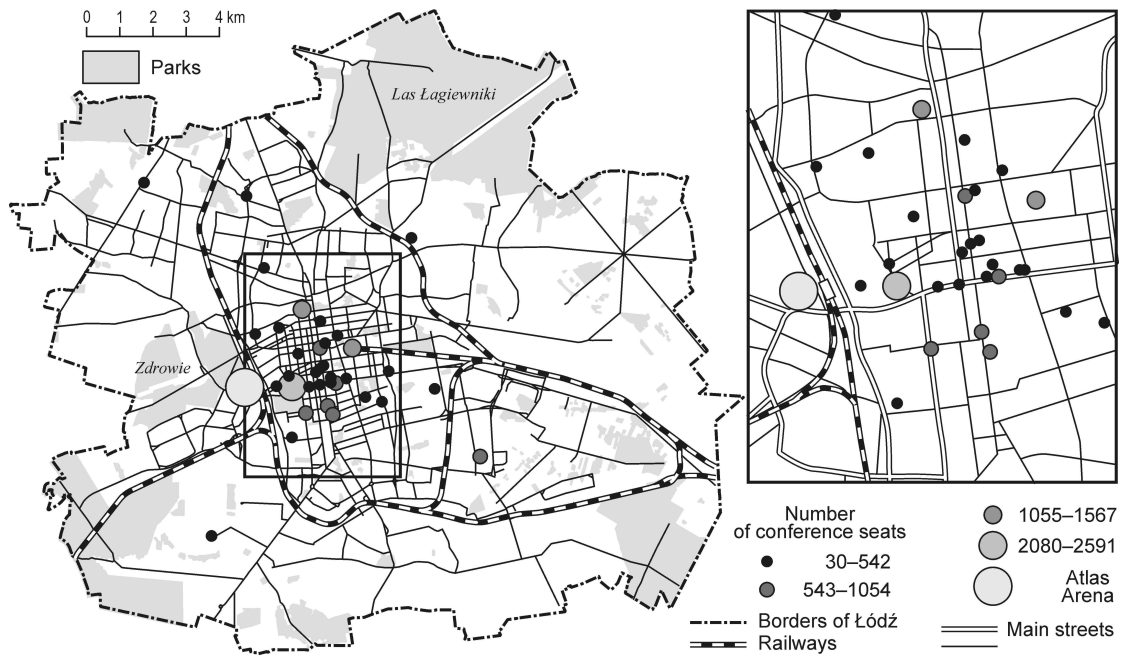


Figure 1. The spatial distribution of conference facilities in Łódź in 2015

Source: authors based on data provided by the Łódź Convention Bureau (<http://www.convention.Łódź.pl/>) and the Łódź Tourism Office (<http://www.turystyczna.Łódź.pl/>) accessed on 22.02.2016

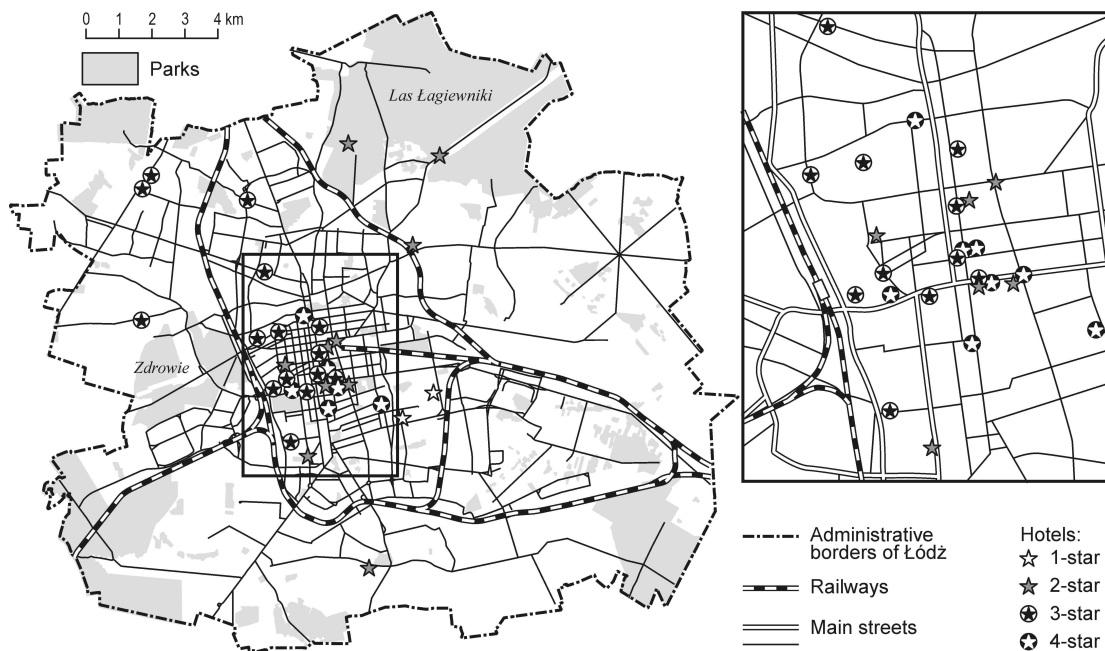


Figure 2. The spatial distribution of hotels in Łódź in 2015

Source: authors based on data provided by the Łódź Convention Bureau (<http://www.convention.Łódź.pl/>) and the Łódź Tourism Office (<http://www.turystyczna.Łódź.pl/>) accessed on 22.02.2016

a certain location for a MICE event, not only technical conditions are considered, but also transport accessibility and the proximity of hotels. The characteristics of the capacity and quality of conference venues are different for each Polish city because of history. If we compare Łódź to Poznań, a city that has had a long

history of trade fairs since 1925, we may notice that Łódź has the capacity to host a lot of MICE events. The total number of seats in conference halls and rooms in Poznań is almost twice as big as in Łódź (Table 1), moreover, the average number of seats in conference halls and rooms offered by one establishment in

Poznań is much higher. In the case of both cities, however, one venue constitutes the biggest congress and conference location. The Inea Stadion has a capacity for seating 44,000 in Poznań while the Atlas Arena in Łódź can host events for 14,000. If we exclude these two locations from the analysis however, the results for congress capacity are reversed (Table 1). Łódź has fewer but larger hotel and congress facilities than Poznań. The same is proven for luxury hotels. The 5-star hotels in Poznań together with 4-star do not provide such spacious congress rooms as the 4-star hotels in Łódź. Therefore, Łódź could organize more MICE events in a facility that also offers high-class accommodation.

Table 1. Congress and conference venues in Łódź and Poznań in 2015

Features	Łódź	Poznań
Number of seats in conference halls and rooms	33,341	66,807
Average number of seats in conference halls and rooms offered by one establishment	775.4	1,060.4
Average number of seats in conference halls and rooms offered by one establishment, excluding Atlas Arena in Łódź and Inea Stadion in Poznań	459.9	355.9
Number of seats in conference halls and rooms offered by luxury hotels	4,955	3,995
Average number of seats in conference halls and rooms offered by one luxury hotel	825.8	285.4

Source: authors and T. Napierala's – *Description of competition's subject, MICE tourism in Lodz Metropolitan Area* (<http://schedule.edu.pl/24hours/subject-description/>).

Most of the conference facilities in Łódź are located in the central and northern parts of the city (Fig. 1) determined by the central location of the venues and the availability of the main attractions. The factor determining the locations of conference facilities in the northern part of the city is the proximity of the A2 motorway.

There were 31 hotels located in Łódź in 2013. The largest group constituted three-star hotels (about 42%), i.e. hotels with an average standard and there were five 4-star hotels (CSO 2015). According to the Central Statistical Office's report, the average annual occupancy rate of hotels in 2013 was 35.2% in Łódź, 44.4% in Poznań and 54.5% in Wrocław. The quality of services in the hotels may have a large impact on the attractiveness of the city as a meeting place. Although Poznań and Wrocław are comparable in the number of inhabitants with Łódź, they were placed in the top four of the leading cities in the MICE tourism ranking,

hosting twice as many events. According to "Poland Meetings & Events Industry Report 2014", which was prepared by Poland Convention Bureau, Łódź is in bottom place in the ranking. Among the 191 meetings of international associations in Poland in 2013, only four took place in Łódź. Taking into account the total number of meetings and events in Polish cities in 2013 only 3.2% of them took place in Łódź (CELUCH 2014).

In 2015, the number of hotels in Łódź increased by 22.5% compared to 2013. There were eight 4-star (Fig. 2) and no 5-star hotels.

3.2. TRANSPORTATION CONNECTIONS AND ACCESSIBILITY

Łódź is located in a central part of Poland, at a distance of 110 kilometres (about 1 hour 45 minutes by car) from Warsaw. Within 300 km of Łódź there are seven Polish agglomerations: Warsaw, Bydgoszcz, Poznań, Wrocław, Katowice, Kraków, and Lublin. Fig. 3 shows the biggest cities in Poland and Europe which are accessible in five hours by car from Łódź and within that distance all the agglomerations of northern, western, and southern Poland are found and also Berlin. Accessibility by car is undoubtedly a positive, strong factor enhancing MICE tourism development in Łódź.

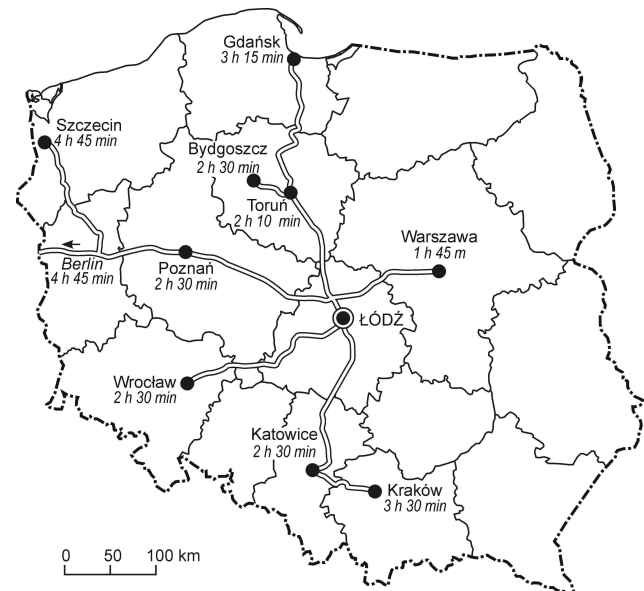


Figure 3. Polish voivodships capital cities and European cities in the distance within 5 hours by car

Source: Authors' own study

In the case of railways, travel time has been reduced over recent years. This is mostly observable with Warsaw: in two hours one can travel there from Łódź. It takes about 2.5 hours to get to Poznań or

Kraków, and about three hours to Gdańsk. Travel to Wrocław takes about 3.5 hours. According to the Master plan for Railway Transport in Poland to 2030, priority tasks in the field of railway network development are:

- 1) creating high-speed lines between the biggest agglomerations;
- 2) creating lines missing in the current railway network;
- 3) creating connections between city centres and their airports.

The first and third tasks are the keys to MICE tourism development by contributing to improving connections between Łódź and the main Polish centres of MICE tourism. They can also give more rapid connections to neighbouring countries, and also raise the standard between airports and travel destinations. The master plan also anticipates that by 2030 Łódź will be connected with Warsaw, Poznań, Wrocław, and for the most with Kraków and Katowice by railways allowing speeds between 201-300 km per hour. Moreover, speeds higher than 141 km per hour will be available between Łódź and other cities e.g. Szczecin, Gdańsk, Bydgoszcz, Toruń, Białystok, Lublin, Rzeszów, and also on lines going to borders with Germany, the Czech Republic, Slovakia, Ukraine, and Belarus.

Travel time from Łódź to the biggest agglomerations in Poland and its western and southern neighbours will significantly shorten. Domestic railway connections might become time-competitive to flights by offering higher comfort for a lower price. Additionally, trains emit less CO₂ into the atmosphere which makes them a more environmentally friendly means of transportation than planes. Environmental protection seems to become a trendy issue in the MICE industry recently. Together with innovative investment and promotion, such as *New Łódź Fabryczna* near the *New Centre of Łódź*, the cumulative impacts of the factors described can lead to an increase of interest in Łódź as a place for MICE events.

However, in order to improve the competitiveness of Łódź on the European MICE market, it is necessary to establish permanent and robust flight connections. Łódź *Władysław Reymont* Airport is located in the south-western part of the city, about 6 km from the centre. Regular connections are offered to six European cities: Amsterdam, Dublin, East Midlands, London Stansted, Munich and Oslo Rygge (<http://www.airport.Łódź.pl/>). The airport does not offer domestic flights but each week there are 17 international flights. In 2014 overall traffic decreased by 45% in comparison to 2012 (Fig 4). The low availability of the international flight network limits MICE tourism development in Łódź.

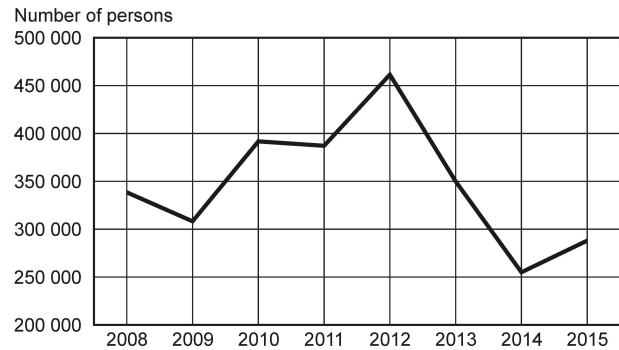


Figure 4. Passenger traffic at Łódź airport: 2008-15
Source: authors based on data from the Łódź airport official website (www.lotnisko.Łódź.pl)

If the number of MICE events is taken into consideration, Łódź is far behind other Polish cities. Among those which are comparable in population with Łódź – Kraków, Wrocław, Poznań and Gdańsk – each hosted more MICE events than Łódź in 2014. With almost 4000 events, Kraków was the leader while Warsaw held 3586 meetings. To add more, a simple analysis of the number of flight destinations for airports in each city shows that all of them offer at least five times as many connections with European cities and also several domestic flights (Table 2). Łódź is the only one among the eight leading cities in Poland that did not offer domestic flights. There are strong links between the supply of air transport services and the number of meetings and events organised.

Table 2. MICE tourism leaders in Poland in 2014

City	Number of meetings	Number of flight connections (including domestic flights)
Kraków	3,986	69 (2)
Warsaw	3,586	97 (10)
Wrocław	2,791	33 (3)
Poznań	1,706	25 (1)
Gdańsk	1,676	53 (6)
Katowice	1,576	30 (1)
Łódź	1,241	5 (0)
Bydgoszcz	779	6 (1)

Source: K. CELUCH (2015), Raport – Połączenia lotnicze... (2014), Raport – Połączenia lotnicze (2015).

When time is critical to any human activity, securing the choice of transport mode can increase the potential of a city as an attractive host for MICE events. In this context, the key is the location of the Łódź in relation to Warsaw (Fig. 3) and its proximity allows for easy access to the use of its infrastructure. Warsaw airports are reachable in 2.5 hours from Łódź. Thanks to this Łódź has communication to the capitals of most European countries and the most important national destinations. The expansion of different modes

of transport from Łódź to the airports in Warsaw can compensate for the disadvantage in air traffic accessibility in Łódź.

3.3. IMAGE OF ŁÓDŹ IN THE MICE SECTOR

It is necessary to create an attractive image of a city to encourage tourists to visit. Shaping a positive image of a place is a very complex process since there are many factors which need to be considered. In very basic terms, image can result from a friendly environment built among others by cultural heritage, natural conditions and events organised. In the case of Łódź cultural heritage and events constitute a chance to positively affect improving the perception of the city.

Creating a strong positive brand and image of a city is nowadays an important factor for building its competitive advantage (BORYCZKA, FELTYNOWSKI, SOKOŁOWICZ, TOMASZEWSKA & ZASINA 2010). The main motives which decide tourists to visit a city are tourist attractiveness and trade – understood as all events and meetings (MUNDT 2001). The attractiveness of Łódź is significantly affected by its industrial heritage, but Łódź Voivodeship as well as the city does not have a popular tourist image (WŁODARCZYK, ed. 2012). Despite Łódź's huge potential it is currently difficult to compete with other Polish cities in terms of leisure tourism and city tourism. Łódź offers post-industrial architecture and technical monuments tourism, which is a relatively new phenomenon in Poland, and thus less popular (JĘDRYSIAK 2011). However, its unique character can support MICE tourism development where the main motives for coming are meetings, incentives, conferences, congresses, exhibitions and other 'events'. MICE events taking place in renewed post-industrial spaces together with a high quality tourism infrastructure may make a unique tourism product aimed at business visits.

The primary goal of marketing is to know and understand clients' needs to sell them the tourism product (PANASIUŁ 2013, SZCZEPANOWSKI 2012). With the use of marketing tools, it is possible to increase the number of group business tourists in a city (PAWLIĆ 2008). Importantly, the tourist offer should be addressed not directly to participants of all conferences, congresses and other events, but to their organisers. They are the target group that, if noticing the potential of Łódź, can help the city become the creative centre of MICE meetings. The results of an analysis of the websites of the 18 biggest companies in the meeting industry on the Polish market show that Warsaw and Kraków are the cities mostly promoted for MICE. Some other Polish cities are also highlighted, but Łódź is not listed among them. However, taking into account all events organised in Poland,

Atlas Arena in Łódź hosted the biggest number in 2014. That proves the potential of Łódź to become a meeting place and the interest of companies in organising them. Numerous awards confirm the good position of the city in terms of business tourism. Hotel Tobacco was nominated as the best boutique hotel in the category of the "Poland's Leading Boutique Hotel 2015" at the 22nd edition of the World Travel Awards (MICEPoland 2015).

Łódź Convention Bureau is engaged in promotion of incentive and conference tourism in the city. This organization has operated within the structures of the city authorities only since 2013. Its aim is mainly to support existing and potential clients, to increase the number of international congresses and conferences organised in Łódź (<http://www.convention.Łódź.pl/o_projekcie_ue.html). Łódź Convention Bureau implements a project entitled "Business tourism as a branded tourism product of Łódź" with the support of EU funds. The project includes such activities as preparing an internet website on tourism for business in Łódź in many languages, publishing a catalogue, organizing meetings for Łódź MICE industry and PCO, arranging reporters' visits, conducting promotional campaigns in the media, representing Łódź at the largest business tourism fairs, like EIBTM or IMEX. The other bodies responsible for marketing activities related to tourism in Łódź are the *Promotion, Tourism and International Cooperation Office* operating at the Town Hall and the Tourist Information Centre. The key issue is that all of these units cooperate with each other and run the marketing campaign promoting an attractive and coherent Łódź tourist offer together. The offer then should be directed to the organizers of the events associated with MICE tourism. Recipients of this offer can be divided into three groups:

- 1) MICE organizers operating in Łódź,
- 2) MICE organizers operating in Poland,
- 3) MICE organizers operating abroad.

These groups need to be addressed through different marketing channels and tools. In the process of communicating with the market there are four basic elements: advertising, public relations and publicity, sales promotion and personal selling (RASZKOWSKI 2012). In the case of organizers operating in Łódź, all the above elements can be applied. Promoting the city nationally, the focus should be on the most effective tools, so that the offer could reach the appropriate audience. Advertising can be used in the form of newspaper advertising in specialist magazines, online, and radio. Public relations and publicity offer a wide range of different tools ranging from promotional videos, TV shows and open days in conference facilities, to sponsorship. For promoting the city abroad, personal selling in the form of presentations at business tourism fairs seems most effective. The promotion mix

tool can be used in communication with companies organizing conferences, congresses, training courses, trips and incentive events, seminars, fairs, exhibitions, shows, integration meetings, educational meetings and competitions. In addition, it is also advisable to reach the relevant bodies involved in the organization of conferences and congresses at universities, incentive trips in enterprises and meetings of professional associations.

In order to strategically develop MICE in Łódź, the citizens' potential should also be strengthened. Currently, the image of the city is strongly influenced by young people who are full of ideas and who break the stereotype of Łódź as a "city of old people and old tenement houses". Building creative industries and supporting young entrepreneurs is included in the Integrated Development Strategy for Łódź 2020+ and its Brand Strategy. Promotional activities recorded in the strategic documents strive to change the city's image of a bankrupt textile industry for a strong centre with a vibrant creative sector (NOWAKOWSKA & SZKARADKIEWICZ 2013). In fact, young inhabitants notice and easily list the strongest aspects of socio-economic development: higher education as well as entertainment and culture. This is confirmed by the results of the surveys described in the report "Łódź in the eyes of students of state universities in the city" (BORYCZKA, FELTYNOWSKI, SOKOŁOWICZ, TOMASZEWSKA & ZASINA 2010). Undoubtedly, the high level of higher education is a strong asset for Łódź and triggers academic conferences and the congresses market. In Łódź, there are 23 higher education institutions, six of them are state and 17 non-state. The largest and most important academic centres are University of Łódź and Łódź University of Technology. The number of academic conferences organized by Łódź's universities in the last five years amounted to 184 (own research based on the portal BazaKonferencji.pl). The University of Łódź organizes most conferences in the fields of humanities and economics. The cultural events hosted by the city are, for instance, Łódź Design Festival and Fashion Week and a number of festivals, including the City of Four Cultures.

In the report, the advantages of Łódź identified by the students were central location in Poland, accessibility and the development of the service sector. The first two confirm the factors described in the preceding sections, the third proves that the service sector is perceived by young inhabitants as a huge opportunity for employment. If properly targeted this sector can be a very important pillar for MICE in Łódź. The Investor Service Office is engaged in the preparation of investment offers for investors creating new jobs, particularly in priority sectors, i.e. Business Process Outsourcing (BPO), logistics, production of household appliances and IT. Łódź is becoming a more and more attractive

city for companies that want to locate modern business services in Poland. The largest centres are Infosys, BRE Centre Operations, Fujitsu Services, South Western and Tate & Lyle. According to the report "Business Services for the financial sector: a success story of Poland", employment in the foreign centres of the financial services sector tripled from 2008 to 2013 (ABSL 2013). Kraków is first in terms of the number of service centres belonging to international financial sector institutions (eight) and in terms of employment (over 4,000). Six such centres are located in Łódź, and three in Wrocław, Warsaw and Tri-City. According to Łódź Convention Bureau to there were 430 business conferences in Łódź in 2013. In 2014, this number increased significantly to 1,241 business meetings organized in 18 conference venues, of which 646 were conferences and congresses and 402 corporate events.

Conference and congress facilities, hotels and their unique character are related to the industrial heritage of Łódź. The remains of the industrial era, i.e. the brick walls of factories, workers' housing and the palaces of wealthy entrepreneurs, create its unique character. Post-industrial estates in the city, which are undergoing revitalization (e.g. Manufaktura and Księży Młyn), create a new space for tourism. Currently in Łódź, you can find more than 200 buildings that bear testimony to the industrial history of the city (MOTERSKI 2011). These buildings are revitalized and adapted to hotels with meeting rooms (e.g. Andel's Hotel and Focus), museums (e.g. the Museum of Cinematography in Księży Młyn) and centres of art and culture (e.g. EC1). They are still, however, only spot locations surrounded by the deteriorating urban structure which is not able to change the overall negative image of Łódź. It is necessary to increase the sense of security and improve the aesthetics so that MICE events can become a part of the city's regular rhythm.

4. CONCLUSIONS

Łódź in comparison with other big Polish cities hosts a relatively small number of MICE events. The factors that limit the development of the MICE sector include the lack of 5-star hotels, a small number of regular international and domestic flights, and insufficient promotion of the city as a business destination. Even though these limitations are difficult to overcome, there are a lot of opportunities that have the potential to outweigh obstacles. Łódź has fast and convenient road connections to seven Polish agglomerations, including the capital. The MICE infrastructure is already developing at an impressive pace and business processes are supported by specialised city offices. The number of hotels in 2013-15 increased by 22.5%. Old

factories are being revitalised and the unique character of the city underlined. The change in Łódź is envisaged by the strategic documents concerning its image and the leading economic sectors.

Analysis of selected determinants of MICE tourism development in Łódź, their limitations, and most of all opportunities, made it possible to identify priority directions in order to improve Łódź's competitive position in MICE sector in Poland. Having the limitations and opportunities analysed, the selected strategic courses of action that are the key to achieving the described goals are to improve rail and flight accessibility, increasing marketing effectiveness and targeting it at the MICE sector, improving the quality of infrastructure and the standard of services offered in congress centres and hotels, and most important of all enhancing the quality of unique events and business related services in Łódź. Łódź does not offer less congress seats per establishment than Poznań or less flight connections if we assume Łódź's accessibility through Warsaw's airports. Łódź seems to be an emerging destination on the MICE events map of Poland. However, the professional organisers do not yet promote the city. Although Łódź, bound by its heritage, is struggling to attract MICE events, its heritage may become a strong factor contributing to delivering unique MICE events and business related services. The over-riding duty to those working in the business tourism industry in Łódź should be to build its competitive position in the context of MICE tourism in Poland.

FOOTNOTE

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