



**SOUTH EAST
EUROPE**
Transnational Cooperation Programme



DATOURWAY



Programme co-funded by the
EUROPEAN UNION

**Transnational Strategy for the Sustainable
Territorial Development of the Danube Area with
special regard to Tourism
DATOURWAY**

Abstract

TOURISM SURVEY
Hungary



February 2010, Budapest

Introduction

Tourism has gradually grown into the most important sector in terms of job-creation, as well as a leading economic sector with a growth rate exceeding that of the global economy. Tourism can provide a future for economic development for a country, a region, a town or a village. The World Tourism Organisation (WTO) forecasts that the contribution of tourism revenues to the GDP will rise from 10% today to 13% in 2020 (with tourist arrivals rising threefold). At the same time, it must be born in mind that the number and length of stay of tourists in Hungary saw a continuous decline in the past 20 years, and the recent economic recession domestic tourism has also come to a halt. Tourism accounts for 8.76% of domestic GDP¹ and provides 328 thousand jobs, plays an extremely significant role in improving the balance of foreign trade, facilitates the exhaustion of local potential and restoring regional imbalances, while having a positive impact on the quality of life.

Despite its favourable potentials, the Hungarian tourism sector faces many a problem, such as the amount of per capita spending, a medium-scale figure by European standards, the strong seasonality factor, as well as the high level of geographical concentration. These can be explained by several factors, such as the insufficient quality and quantity of tourism supply, the inappropriate conditions of tourist welcome services, outdated training skills and the underdeveloped operational structure of the tourism sector (a well-coordinated organisational system with appropriate financing, responsible for the development of tourism destination areas and management, with clearly designated competencies and professional skills). The establishment of a decentralised organisational system based on tourism welcome areas, that is destinations (tourists' travel destinations) is a precondition of recreating the Hungarian tourism sector as a sustainable and compatible industry.

Despite its significant role in national economy, tourism has been put onto a back-burner by governmental- and political opinion-formers. Therefore, the bargaining position of the sector needs improving.

The fact that out of the 2007 – 2013 EU development resources a HUF 300 billion (New Hungary Development Plan (ÚMFT) – 280 billion, New Hungary Rural Development Programme (ÚMVP) – 16.6 billion) budget has been set aside for tourism development purposes is an excellent indicator of the key role attached to the tourism sector.

Tourism attraction

The tourism attraction of the seven counties of the Danube area and Budapest lie in very different features. Although an extremely important link and determining natural and landscape feature, the Danube is not yet frequently used for passenger- or cruise-ship sailing. In towns and villages with no direct contact with the Danube the river plays an increasingly insignificant role, and the focus falls on the unique attractions of the respective town or village. The following provides a list of these attractions by county.

Due to its vicinity to the border, as well as its situation in terms of transportation geography and spatial structure, **Győr-Moson-Sopron county** serves as a gate with respect to tourism arriving to Hungary from the West. Over one-third of the tourists visiting Hungary arrive to the country via a border crossing located in Győr-Moson-Sopron county. As a result, there is a

¹ A teljes közvetlen és közvetett turizmus szektor összesített adata, amely magába foglalja a teljes közvetlen turizmus szektorral kapcsolatban lévő, ahhoz beszállító tevékenységgel hozzájáruló teljesítményeket is (forrás: NTS 2005.)

significant amount of transit tourism and shopping tourism, though the latter is experiencing a gradual decline.

Aside from busy tourism corridors and a transit function, the county plays a notable role in tourism due to its built attractions of international and regional significance, folk traditions, its 50 castles and mansions, as well as its castle hotel and cultural events. Two world heritage sites are also to be found here: the Millenarian Benedictine Abbey of Pannonhalma and its adjacent natural environment, and the cross-border cultural landscape of Fertő/Neusiedlersee, shared with Austria. The county is rich in natural values and holiday resorts of national attraction, as well as sites for active and green tourism, such as cycling opportunities and water tourism both on the Danube and Lake Fertő. Medical- and thermal baths, excellent potentials with respect to wine and gastronomy and the conference centres under construction also add to the county's tourism charm.

Győr and Sopron, its two cities with county status, are major tourist attractions. Sopron is an important station in the vicinity of the border, on the transit corridor of Roads 84 and 85. a 84 as well as a major tourism centre with the highest appeal and broadest supply. The natural potential surrounding the town (forest-covered, mountainous environment, climate as a medical factor, Balf medical water, water banks, etc.) and the attractive nature of the built environment create a rather appealing mixture. Its rich monumental and cultural-historical values make it an extremely radiant cultural centre and tourism destination. Győr is a very important transit centre on the busiest tourism corridor of Hungary but its ability in stopping transit traffic goes beyond its traffic hub function and lies in its multi-sided potentials as a tourism destination. These potentials spring from its tourism attractions as well as the infrastructural and institutional background and cultural events, blooming business life the city has to offer.

Despite the fact that quite a lot of towns and villages are involved in receiving tourism, the tourism is practically bipolar due to the dominance of Győr and Sopron in terms of geographical distribution of receiving capacity and guest traffic. The two cities at issue account for nearly two-thirds of the receiving capacity and almost three-quarters of the guest nights realised in the county. Sopron, the traditional tourism centre of the county has a high quality and complex palette of tourism products. Its accommodation capacity is 1.5 times, while its guest traffic is two times that of Győr's. The Danube, with its branch called the Mosoni-Duna is an important recreation axis in the county. The Rába can account for significantly less importance as a recreation axis due to the insufficient infrastructural conditions of the receiving capacity in the towns and villages along the Rába river. Generally speaking, the Southern part of the county – the inner peripheries of the Rábaköz area and the outer peripheries of the Répce-sík – is a tourism-wise under-explored area with a lower-scale, mosaic-like but diverse set of potentials and a significant amount of reserves for tourism development. As a result, the tourism structure of the county is imbalanced with a North-bound shift.

Due to its vicinity to the border **Komárom-Esztergom county** is a link between South Slovakia, the Northern part of West Transdanubia and the Pilis and Dunakanyar (the



Danube Bend) areas of Budapest's agglomeration. There is a significant transit traffic on the M1 motorway towards the East-West directions. The Danube area used to be part of what was once a coherent industrial axis of Hungary but is by now more sporadic in terms of industrial activity. Nevertheless, environmental burden is very high in this area up to this date. Other parts (Vértes, Gerecse premountains) of the county have also been industrialised and urbanised to a great degree, with a serious level of environmental burden in several areas. The priority tourism types in these areas should be those – softer, gentler and therefore greener – aspects that will sustain the ever more vulnerable natural values of the target areas on the long-run.

Consequently, the tourism industry has not invaded the Danube area – the only places with more significant tourism presence are around the Dunakanyar area (Esztergom, Dömös). The natural landscapes (e.g.: Dunakanyar, Gerecse, Vértes, Bakonyalja) and cultural and church-related values of the county are excellent potential appeals for tourism.

Komárom-Esztergom county is one of the most intense “heritage sites” in Hungary in terms of archaeological remains and built values left behind from the Roman times. It is the cradle of Hungarian ‘statedom’, and as such, all the prints of the destinies of the Duna-mellék area are imprinted in its cultural values and traditions (e.g.: Esztergom Castle, Cathedral, Fort Komárom, all of which are world heritage sites). The county is rich in both natural and landscape heritage. It has a biosphere reserve, a national park, an area protected under an international convention and a vast area of protected or so far not protected, but valuable hidden gems (Duna-Ipoly National Park; Vértes Nature Park, the planned Bakonyalja Nature Park and Gerecse Nature Park). At the same time, Komárom-Esztergom county is famous not only for its natural heritage but also its surface subsidances and the negative aspects of urban landscape. These could be involved under the tourism umbrella via rehabilitation (Oroszlány Mining Museum).

Tourism attractions follow a mosaic-like pattern in Komárom-Esztergom county. Individual towns and villages strive for tourist attention by themselves; thinking in sub-regional terms is non-existent. Island-like centres of tourism attractions should be grouped together with their sub-regional background. There are several such tourism hubs of significant tourism profile (Komárom, Esztergom, Tata, Bábolna-Kisbér). There is no real cohesion between the Eastern (belonging to the Middle-Danube Tourism Region and therefore to the Duna-kanyar and Budapest) and the Western (belonging to the Central Transdanubia Tourism Region) parts of the county. The gradual elimination of this scattered, bipolar structure could free sizeable reserves. The link-function should be strengthened in terms of Slovakian-Hungarian relations as well (between the two parts of Komárom, between Esztergom and Párkány).

On the whole, tourism indicators of Komárom-Esztergom county showed steady improvement in the past six years. The number of guests in commercial accommodation has seen a 30% increase since 2002. The number of guest nights in commercial accommodation has grown by 24%, with its peak in 2006 and a gradual decline in the past two years.

Compared with 2002 figures, the capacity utilisation rate in commercial accommodation is 22%. Guest traffic in private accommodation in Komárom-Esztergom county saw a 26%, while the number of guest nights a 46% growth in the past three years. 46% of guests staying at private accommodation stay at private accommodation classified as rural accommodation.

Ongoing development projects in the county:

- Conserving and turning into a tourism attraction the cellar system of the Esztergom Cathedral (Violinist Cellar - Prímás Pince), improvement of the Cathedral's tourism capacities – priority project,

- Fort Monostor: Euroregional Cultural-Tourism Centre,
- Renovation of the Oroszlány Mining Museum of the Central Mining Museum via the revitalisation of former mining buildings and the elaboration of a new exhibition strategy, in order for it to become a determining tourism attraction in the region,
- Rehabilitation of the catchment area of the Tatai Öreg-tó (Old Lake of Tata) and the Által-ér (Stream Által), as a priority non-tourism investment,- amount of funding: HUF 1,500,000,000,
- Reconstruction of and turning into a tourism attraction the Oroszlány-Majkpuszta Kamalduli Remeteség Foresteria building,
- Rehabilitation of the Tata Angolpark (“English Park of Tata”),
- Construction of the Tatabánya bicycle path.

Pest county, also known as the Central Hungarian (Statistical) and the Budapest-Middle-Danube (Tourism) Region is often call the “heart” of Hungary. All the major railway lines are headed towards Budapest, all the main roads of national scale intersect here, and the geographical centre of Hungary, Pusztaavacs is also located here. Pest county is the economically most highly developed region of Hungary.

Despite its relatively high level of development, the region faces significant internal imbalances: there are economic (and tourism-related) discrepancies between the Budapest Agglomeration and the outskirts of Pest county. Its tourism importance and appeal is determined by the popularity of Budapest, the Dunakanyar area and the Ráckeve Duna-stretch. Over third of the total guest traffic, and over half of international guest traffic is realised in this area.

Its undisputable role throughout history and on terms of administration is explained by its geographical location. The capital city, Budapest awaits visitors with the highest number of monuments, historic memorial sites and cultural events. The Castle District and recently also Andrassy Road has been designated as a World Heritage Site. Budapest is also a venue for the most important congresses and (tourism, cultural, sport) events. The most outstanding historic towns in the county are: Szentendre (churches), Visegrád (Visegrád Fellegvár [Castle in the Sky], Visegrád Palace, Vác (Vác Cathedral) etc. Its landscape is also extremely diverse, starting with saline puszta and on to medium-scale mountains, the area presents the most versatile of geographical shapes and landscapes. This is the area, where the winding Danube, the largest river in Hungary is embraced by beautiful mountains before it divides into two winding flows just to unite again after passing the Szentendre Island, close to the border of Budapest. The right and left banks of the Dunakanyar area form integral parts of the Duna-Ipoly National Park. The Buda wine region is a determining factor in the gastro-tourism directed at the area.

Pest county and Budapest have excellent tourism potentials. The population is exploring the opportunities hidden in the leisure industry, the area is part of an international tourism corridor, with a highly developed tourism infrastructure in comparison with other regions, seasonality is less typical but tourism activities are geographically concentrated in Budapest. Its international appeal involves: complex services of relatively high quality, built heritage, festivals/events, medical- and thermal waters, business tourism, sightseeing tourism. The international appeal of the region is focused in Budapest, while the area outside of the capital have attractions of a different (national, regional) level. There is no institutionalised cooperation between the different fields and actors of the tourism sector, no joint lobbying activities of Budapest and the other areas, and no cooperation between municipalities and entrepreneurs.

Despite the high level of *guest traffic*, length of stay is below the national average but the region accounts for the highest rate of accommodation utilisation capacity in the country. Shorter length of stay is all the less obvious because the most popular international cultural and sports events take place in Budapest (Spring Festival, Formula-1, European- and World

Championships, etc.) and the Budapest International Fair also attracts huge masses of people. Higher-scale developments are now being realised outside of Budapest as well. In the past five years, the highest growth in accommodation was generated in the three, four and five star categories; in the highest category, the number of accommodation was practically doubled. However, a 30% decline was seen in the two and one star categories. (The number of three star hotels was steadily decreasing in the past three years.)

Fejér county is one of the most developed counties in Hungary with a central location, a diverse natural environment, a rich palette of beautiful cultural values and a relatively well-developed infrastructure. At the same time, tourism could go a long way in resolving or easing existing problems and could contribute to the implementation of the overall development objectives of the county. The county is easily accessible by every means of transport, the overall transportation network can be considered good (although road density falls short of the EU average). The M6 and M8 dual carriageway roads and the new Danube-bridge strengthen both horizontal and vertical connections in national as well as international terms (with Austria, Slovenia and Croatia).

Both Lake Velence and the Danube provide favourable opportunities for waterside holidays, water sports and angling. Sárvíz and the inner lakes are also excellent places for the latter activity. The Northern and – to a smaller extent – Southern parts of the county as well as the Sárvíz valley connecting the two accommodate a substantial amount of landscape in nature-like condition that would provide good potential material for the development of eco-tourism. The population is well-known for their hospitality and openness in participating in the tourism industry are the most important assurances that tourism development efforts will be appreciated. Typical features of tourism activity in Fejér county are: excursions, sightseeing tours and an extremely strong seasonality factor. The county is rich in natural, cultural, historic and architectural attractions. The most important natural resource and attraction is Lake Velence, the second largest natural lake of Hungary. The Velence Mountains on the Northern side of the lake create a unique climate for the lake, while the geological formations in the mountain range, its rich history and mementos, as well as its grape and wine culture represent a substantial tourism value. The rest of the attractions on the county's palette are of a medium-scale in terms of potentials and quality.

In this sharp competition, product range, quality and efficient marketing activities are essential in determining who and in what percentage will take their share of the ever expanding and more and more profitable tourism market. The majority of the natural attractions are currently not utilised as tourism products, and those that are utilised as such, are affected by a strong seasonality factor. Utilisation of cultural heritage takes place in forms of extremely low relative profitability, such as excursions and sightseeing tours. The only place with an appeal for a multi-day stay is Lake Velence and the adjacent area, while local attractions (monuments, archaeological sites, events, historical memorial sites, wine regions, programmes) are only of interest to tourist already in the area.

The county has a monopolar tourism structure, with the centre arranged around the geographical trio of Székesfehérvár – Lake Velence – Velence Mountains. The over 50 km long Danube branch with its dead channels, islands and floodplains, found the Eastern side of the county



cannot counterbalance the monopolar structure. Its appeal lies in its landscape values and the growing amount of green tourism realised in the area. Due to the M6 motorway section, the county's accessibility has seen a significant improvement recently. Vonzerejét tájképi értéke révén valamint a növekvő zöldszturizmus révén fejti ki. Az elérhetőségi viszonyaiban javult a megye helyzete a megyei szakaszon kiépült M6 autópálya révén.

The monopolar structure is reflected in the guest figures as well. 61% of the total number of guest nights are realised in the Lake Velence resort area and an additional 14% is generated in Székesfehérvár. 75% of tourism into the county is realised in these two areas. Consequently, tourism requiring overnight accommodation is practically non-existent as a significant factor in other parts of the county. Beside the uneven geographical distribution, an outstandingly strong seasonality factor has to be calculated with as well. On an annual basis, 45% of guest nights in commercial accommodation is realised in July and August.

Due to the insufficient quality of the tourism infrastructure and the lack of appealing programmes, profitability of the tourism industry in the county is rather low in several respects. There are extremely few four or five star hotels around Lake Velence even though the majority of guest nights are realised in hotels of this category. Due to the substantial ratio of camp sites and bed and breakfast places in realising guest nights, both relative sending and the profitability of the sector is rather low.

Guest traffic in Fejér county can therefore be described by an uneven geographical distribution, a high rate of transit and excursion tourism, an outstandingly high rate of seasonality, a low rate of relative spending, and – unlike the national trend – a decline in the number of visitors in the past two years. The accommodation structure of the county is unfavourable, the majority of the accommodation is outdated with a low level of comfort and an insufficient amount of additional services. Low profitability of the tourism sector is a combined result of the factors listed above.

Bács-Kiskun county is the largest county of Hungary in the Great Plain, bordered by the Danube from the West and the Tisza from the East. Due to its vicinity to the border and its location in terms of transportation-geography, the county accounts for a high rate of transit traffic. The county is actually a central area of the country, and as such, serves as a starting location towards any other region of Hungary. The primary means of tourism transportation in the county is by road: the M5 Motorway, which is an integral part of the Trans-European Motorway (TEM), the E75 Main Road, as well as the East-West Dual-carriage Way Roads in the pipeline (M9, M44) and the Danube-bridges (Szekszárd, Dunaújváros).

The county's attractions spring mainly from its *natural values*. Its natural fauna consists of puszta plant associations, sand and floodplain forests. The number of surface waters – excluding bordering rivers – is rather low, out of the former saline lakes only those with a continuous permanent or temporary water supply have survived. The majority of area of the exceptionally beautiful Danube floodplains is covered by forests and still holds the remains of the former riverside hardwood forests. Both its soil and its plant associations show great diversity. Its medical and thermal waters are of national and international appeal. The county's tourism potentials are considered to be favourable, considering the – compatible or possibly compatible on the international market – product groups highlighted in the national strategy (medical tourism/wellness; holidays; active tourism; cultural and heritage tourism; rural tourism, as well as gastronomy and wine tourism; congress, business and incentive tourism [MICE]). The county has positive development potentials with respect to nearly all these priority products.

Spatial structure of Bács- Kiskun county is determined by the M5 Motorway, the county's vicinity to the border and the port in Baja. Popular target areas are nature conservation areas, thermal baths and sightseeing tours (Kecskemét, Kalocsa). Consequently, guest traffic is realised primarily in the central part (Bugac area) of the county and that adjacent to the Danube. Those, so far less popular in terms of tourism, towns and villages of the county can become part of the tourism circulation via gastronomy and wine tours, and horse-riding tours.

The only place with hotels with a sufficient receiving capacity in case of programmes that require high hotel capacity is Kecskemét. The majority of camp sites and holiday homes serve mostly as accommodation for those staying for one night only. Private accommodation is present as bed and breakfast accommodation in the towns, rural accommodation in villages, outskirts of towns and isolated farms. As a result of the overhaul of the ownership structure, there is a sufficient amount of commercial services in the areas affected by tourism; both the number of retail facilities and the product range on offer ensure that local population as well as tourists are well catered for. Despite the quantity and quality improvement experienced in the catering industry, higher quality services are called for in case of national and international visitors alike.

Tolna county lies where the Alföld (Great Plain) and the Transdanubian Hills meet, it is one of the smallest counties in Hungary. The economy of the county is dominated by the three biggest towns – Dombóvár, Paks and Szekszárd – which lie in three different corners of the county. Paks and Szekszárd play an important role in a densely populated part of the county along the Danube River, and due to the bridge across the river at Szekszárd, this impact is felt in the Great Plain too. Dombóvár is situated close to the border of the Baranya and Somogy counties, acting as a passage towards Kaposvár and Pécs.

Tolna county does not have a great number of tourist attractions, nevertheless in some years during the past two decades (e.g. 2002), contrary to national and the regional tendencies, both the number of tourists and the number of guest nights increased, both for domestic and for foreign tourists. This also meant an increase in revenues from tourism in the county.

The main tourist attractions of Tolna county are the Gemenc-Gyulaj wildlife reserve within the Danube-Dráva National Park and the fishing sites in the oxbows of the Danube. The natural assets in the region are partly a basis for developing eco-tourism and partly exploited by hunting tourism. There are natural and artificial waters and beaches (by the Danube, the Sió Channel and natural and artificial lakes) as well as thermal and therapeutic waters, which offer numerous possibilities for holidaymakers through water sports, fishing, bathing etc. We find here the historical Szekszárd wine region and several architectural and other sights linked to wine-making. The characteristic Sárköz culture and collections featuring its cultural values, the built heritage, rich folk traditions, the outstanding ethnographic heritage, the strong and close ties of the large minority population with the mother country are a good basis for raising the international profile of the area.

The most significant attractions and tourist destinations are along the Danube and around Szekszárd.

As mentioned before, the wines matured at the Szekszárd Hills, the Gemenc forest and the holiday resorts along the Danube attract most visitors here.

Altogether, despite its natural and cultural assets, the county is below the national average in terms of guest nights. One of the reasons for this is probably the shortage of adequate accommodation - especially of high quality options - and the deficiencies of tourism marketing in the region. The county average is lower than the national average in terms of length of stay too, both for domestic and for foreign guests. The low number of guest nights

per visitor indicates that the county is a transit station for most, not their final destination. This can be explained by the low standard of tourism products, there aren't any „cleverly created” product groups, supply of tourism products and services is small, scattered and very diverse in quality, which is not very attractive to visitors. The tourism potential of the county, however, only creates the possibility of developing tourism services. The development of tourist attractions alone does not lead to the improvement of tourism services supply, as income will only be realised if businesses are established around the attractions.

Almost 60% of Hungary's tourism is absorbed by Budapest and the three counties by the Lake Balaton. The other 16 counties receive 40% of the total volume. For **Baranya** this means that its current share of 3.7% cannot be expected to change in the near future. As an important hub of South Transdanubia, Baranya plays a dominant role in the non-Balaton-related tourism of the region, but its tourism traffic is much lower than in the counties bordering Lake Balaton. It also offers a large number of potentially accessible guests for the lakeside tourist destinations. Following Budapest and the top four counties bordering Lake Balaton, Baranya county has a stable position as an above average county in terms of guest nights.

The characteristic tourist attractions of the region are amply present in Baranya county too (varied natural sites, meeting of different eras and cultures, ethnic diversity). The county possesses attractions of international significance in all three of the categories mentioned above. Among the attractions we find the Danube-Dráva National Park, therapeutic and thermal waters, the lakes of Orfű, and in the category of cultural heritage the county boasts the Early-Christian Necropolis of Pécs (and the World Heritage Site application), the architecture of the Turkish era, the Benedictian abbey and fortress of Pécsvárad, the gastronomic and wine culture, which has a characteristic ethnic background that links up several other tourism products. Pécs and the historical sites of the county, as well as its thermal spas, folk culture and living folk art rank among the prime attractions of Hungary. There are also many secondary attractions (churches, folk traditions, artisans, hunting, fishing and other water-related attractions), which are situated sporadically, due to a settlement network characterised by small villages. The utilisation of these attractions in the framework of a product package developed for promoting tourism, could provide a living for the communities concerned and entrepreneurs in the area.

The county has a bipolar spatial structure – there are on one hand the Pécs, Pécsvárad, Mohács-Bóly, and partly the Komló and Siklós micro-regions, which are developing in a relatively balanced way, and then there are the less developed south-western micro-regions, which are lagging behind. The fate of the county is key to the prosperity of Pécs. There is also the secondary economic axis made up of the three towns: Mohács, Szigetvár and Komló. In tourism the main contours of the county are given by Pécs (Cultural Capital of Europe in 2010) and Harkány, which have the highest number of guest nights and represent 44.2% and 26% of the county's tourism respectively. Thus these two destinations handle two-thirds of tourism directed to the county. The role of other registered sites is much smaller. In the guest nights-based ranking Orfű retained its third place. Komló comes fourth, outperforming Szigetvár, which held this position for a long time. The other communities that



achieve a significant number of guest nights within the county are: Abaliget, Mohács, Bikal and Villány The micro-regional breakdown of guest nights also shows the bipolar character of the county. The Pécs and Siklós micro-regions account for 86% of guest nights, leaving only 14% for the remaining 6 micro-regions.

Tourism infrastructure

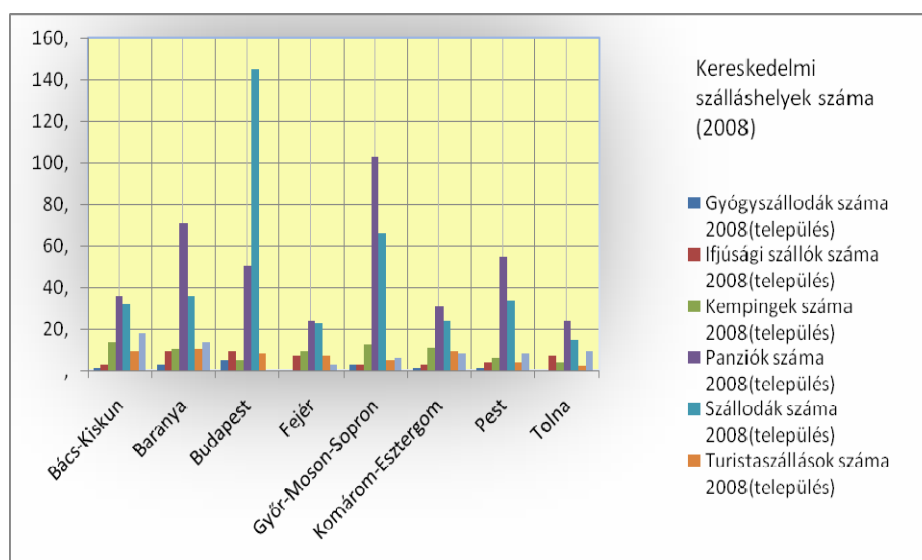
Tourism infrastructure: objectified and intellectual tourism services built on the basic infrastructure, which primarily serve the purpose of identifying and selling tourist attractions, and which can also be used by the local population .

Accommodation capacity and number of guests

In 2008 the **number of available accommodation** in the Danube area came close to 9 000, which represents a share of 18 % of all the available accommodation in the country. The capacity in the area is 2 guests per 1000 inhabitants, which is less than half of the national average (5). This is an indication of how insufficient the capacities are in the Danube area.

The **number of available accommodation** in the Danube counties comes close to 140 thousand, which represents a share of 26 % of all the available accommodation in the country. Regional distribution of available accommodation per 1000 inhabitants is as follows: Baranya with 61 places available, Győr-Moson-Sopron with 35, Komárom-Esztergom with 34 and Tolna county with 33 places have the most favourable indicators. These figures compare with the national average of 53 and the Danube area average of 26. The number of available accommodation in Pest county (9 places) is the worst in the area, some one sixth of the national figure, but it also lags far behind the regional average. The capital city has a very large accommodation capacity in a geographically concentrated area, but because of its high population density the capacity per 1000 inhabitants (26) does not exceed the regional average.

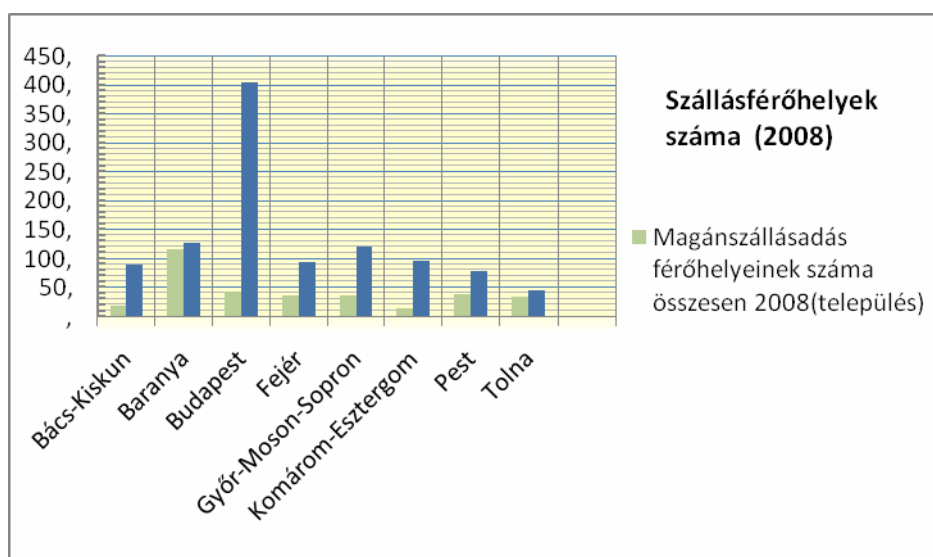
The breakdown by types of available accommodation shows that 24% of accommodation in the Danube area belong to the category of private lodgings.



Forrás: TEIR

More than half of commercial accommodation, which represents 76% of all accommodation, is provided by hotels, mainly because of their great number in the capital city, although their proportion is also considerable in Pest and Győr-Moson-Sopron counties. However, the number of hotel accommodation is low in Komárom-Esztergom, Fejér, Bács-Kiskun and

Baranya county. In the commercial accommodation category the camp sites represent over 21%, their proportion is rather high in Fejér, Komárom-Esztergom and Baranya county.



Forrás: TEIR

The changes in the number of available accommodation between 1998 and 2008 with regard to commercial accommodations and private lodgings was as follows. Stagnation can be seen in the number of commercial accommodation, there was a national increase of 5%, whereas the Danube area combined with the capital city showed an increase of 1%. In terms of the spatial distribution of the available accommodation, there was a dynamic increase in the number of accommodation in Komárom-Esztergom county (45%), Tolna county (35%), and in Budapest (20%) whereas there was a decrease in available capacity in Fejér (-30%), Baranya (-18%) and Pest counties (-16%). If we examine the change compared to the figures in 2004, a decrease can be identified everywhere. However, in the area of private lodgings there has been an increase in all over the area, which is partly suggested by the reported data available in the statistical databases.

In addition to the supply side, the demand - that is the **changes in the number of visitors** - can be studied by looking at the number of guests coming to the area and the guest nights spent there, with their spatial distribution and change over time.

Statistical data only indicate those guests who also take accommodation, the whole number of visits can be surmised from other data (eg. the number of visitors of different events) and local surveys. This suggests that in addition to the traditional guests spending at least one night in a tourist destination, the demand on part of the local residents, tourists on a one day outing and owners of weekend houses should also be studied. In numerical terms, most of the visitors who come for events are active tourists who do not need accommodation. The guests who spend several days in the region may be smaller in number but they contribute the greater share of revenue because they are making use of complex tour packages, which also include accommodation.

In 2008 the **number of guests** visiting the Danube area exceeded 4 200 thousand, a figure which amounts to some 50% of all guests coming to the country. It is important to highlight that Budapest was responsible for over 60% of this figure. Knowing the dominance of the capital city, the regional distribution in proportion to the population is the following per 1 000 inhabitants. In addition to Budapest (1 500 guests), Győr-Moson-Sopron (1 000 guests) and Baranya county (750 guests) can boast with the greatest number of guests, the national average is 850, the area average is 800 guests including Budapest, and 450 guests excluding Budapest. The least visited ones are Pest and Fejér county (290 guests), but Bács-Kiskun and

Tolna county also lag far behind the regional average (300 guests). The proportion of foreign guests in the Danube area is 63%, but this can be clearly attributable to the capital city. Excluding Budapest this value is only 29%. In terms of distribution mainly the counties along the western and southern borders have a significant number of foreign guests, the number of foreign guests for 1 000 people is 420 in Győr-Moson-Sopron, 150 in Baranya, and almost 150 in Komárom-Esztergom county. However, the proportion of foreign visitors is low in Tolna (some 50), Bács-Kiskun (70) and Pest county (80 guests), compared to both the national (380) and to the regional average (130 guests) excluding Budapest.

Over 90% of the guests stayed in commercial accommodation, the majority of them in hotels. In the course of the evaluation the dominance of the capital city should be considered, just like the fact that the indicators of private lodgings are often lower than the real values, as the accommodation providers – to avoid having to pay taxes or in an attempt to pay less taxes – report less guests to the local governments.

The proportion of those staying in private lodgings lags behind the national average. The number of guests per 1 000 inhabitants is 40 in the Danube counties excluding Budapest, whereas the national average is close to 100 guests. The number of visitors going to Baranya county (almost 130) is higher than average, and the figure for Győr-Moson-Sopron county (over 60 guests) is also significant.

The other indicator of the demand for various destinations is the **number of the guest nights spent**. In this regard the attraction of the Danube area unfortunately lags behind that of the national average even combined with the attraction of the capital city. The total number of guest nights per 1 000 inhabitants in Hungary exceeds 2 600, whereas the regional indicator, including Budapest, is just over 2 000, and without the capital city it does not even reach 1 200. In 2008 the total number of guest nights in the area was 10.7 million, amounting to 40% of the national figure. Excluding the capital city this share is only 15%.

The tendencies related to the number of guests nights spent in the area between 1998 and 2008 were favourable. In the commercial accommodation sector there was a national increase of 18%, while the demand for the Danube area including Budapest also rose by 24%, and without the capital city the rise was some 10%. In terms of regional distribution the demand for Pest (46%), Tolna (39%) and Komárom-Esztergom counties (36%) and the demand for Budapest (34%) rose to the greatest extent. The number of visitors to Fejér county, however, went down by some 50%. In the field of private lodgings an average of some 25% increase in the number of guest nights can be seen both at the national and the regional level. The number of commercial accommodation taken by foreigners – compared to the national increase of 11% - rose by almost 27% in the area including Budapest, whereas it decreased by 7% excluding the capital city. In this context the share of Győr-Moson-Sopron county (40%) and that of Budapest (37%) are significant. Foreign demand for private lodgings is lower and in regional and national terms is decreasing. There are exceptions and these are Budapest, Bács-Kiskun and Baranya county, where the increase in the number of foreign guests was on average 30-40%.

The introduction of the holiday vouchers has played an important role in the increase of the number of domestic guests, which has had a favourable impact on both the incentive systems of employers, and the income of employees, thus increasing the desire of people to travel. All this in turn has had a positive impact on the work opportunities and revenues of companies and employees in the tourist business.

The number of guest nights in proportion to the number of guests enables us to come to a conclusion regarding the **average duration of stay** of the guests. It is 2.5 days in the Danube area, which lags somewhat behind the national average (3.1 days). This short duration of stay

is characteristic of weekend tourism, which is something that accommodation providers increasingly introduce into their marketing strategy in the form of special promotions for weekends and holiday packages. In terms of regional distribution no real difference can be discerned, only Baranya county reaches the national value, where even foreign guests spend more days on the average (4.9 days) than in the rest of the area.

The **examination of the utilization of the accommodation** is of vital importance regarding the expected recovery and efficiency of tourism investments, which is indicated by the number of guest nights for accommodations. The level of utilization for the Danube area is 12% on the average, whereas with Budapest included this value is over 21%. The indication is that in addition to the capital city, the most economically operating accommodations are in Győr-Moson-Sopron and Pest county. The data are also impacted by the more moderate supply of accommodation, the relatively higher number of guests, and the seasonality in tourism. This is how the less season sensitive capital city with its higher demand stands out, just like Győr-Moson-Sopron county with its really great number of guests, and Pest county with its relatively lower supply of accommodation.

Tourism marketing, information, system of institutions

The products of tourism – just like all other products on modern markets – can only reach their target audience and consumers as a result of consciously devised marketing activity. The settlements, less often micro regions and certain areas have started the marketing of their settlements, or tourism products, but to be able to achieve the tourism objectives of a given micro region, the isolated marketing efforts shall be combined.

The key element of the common image and marketing is to create messages that can identify the area, can be easily remembered and communicated, to develop brands, which have already been attempted for Szigetköz (“natural food from Szigetköz”, the development of an eco tourism brand). The Danube area is not a distinct tourist region, thus it is not mentioned as a separate destination in public opinion polls either. That is why the identification of the area is a task of primary importance, and within the area the different target areas shall also be identified (eg. “Dél-Buda Environs – the area of active relaxation”).

The national market research surveys indicate that the proportion of day trips and trips lasting several days increases, the day trips representing a higher proportion. The main underlying motives for the above are shopping and visits paid to relatives and friends. The objective of the main journeys is to spend a more substantial amount of time at a particular location, the purpose being recreation, the so-called passive relaxation: in the summer it is bathing. Going to see cultural, natural sites is yet another strong motivation for travel. The next most popular objective is visiting health spas and relaxation, whereas the third objective – with a gap - is different sports activities. When it comes to selecting a destination, guests consider the attractive natural environment, previous positive experiences, and the recommendation of acquaintances in the first place. In terms of the acquisition of information, the internet, other media platforms, printed promotional publications, information events satisfy a huge demand, but nevertheless there is a good reason for their extension. Among travellers’ expectations we can identify the environment, accommodation, hygiene, the quality of the journey to the destination and back, the weather, whereas in the case of group travel the services of the travel agency and hospitality are also important considerations. It can be identified that the number of individual trips increase at the expense of group trips, the readiness to host domestic guests is on the increase, domestic demand is becoming more prevalent. Trips organised by families, parties of friends and individuals are equally characteristic of domestic tourism.

Out of foreigners the Austrian, Dutch, Belgian and German guests are the ones who like the area the best. The number of visitors to the Danube area changes on a fundamentally seasonal basis, for climactic reasons and because of the geographical location it is mainly the summer, and to a smaller extent the spring and the autumn which are tourist seasons. Most of the journeys are made by car, a fact that calls attention to the increasing demand – both in terms of quantity and quality – for the road network and the servicing facilities.

In terms of providing information, the regional publications and other information products, advertisements shall be extended. It is a positive development that outside settlements uniform welcome and information signs have been placed, but the opportunities to obtain information have decreased. There are not enough public areas closed for traffic, pedestrian precincts, promenades along the Danube, public parks offering recreational activities, quality restaurants having a garden, and public conveniences. Among the shortcomings of the tourism infrastructure we shall mention the unlit historic buildings and buildings having a historic character. The technical opportunities available today (eg.: the internet) could greatly contribute to publishing the available tourists' opportunities, and to raising the level of cultural programmes, not only in the developed locations, but also in the settlements at a disadvantage, in small villages and on the peripheries. The existing cultural centres, libraries, and telecottages are also suitable to carry up-to-date contents – electronic libraries, distance education, etc. The Danube area has no uniform, complex website, only regional pages featuring different themes can be found. An increasing number of settlements, small regions, counties, areas, recreational areas, and thematic tourist products have their own website. The websites where people can search for accommodation is the most comprehensive.

The tourist organisations having direct contacts with the guests are the tourinform offices, and partly the travel agencies. The tourist cooperatives and associations – as non-profit organisations – effectively contribute to the making of tourism product development programmes, they organise events, are engaged in marketing activity and interest representation. Important organisational units are the different thematic clusters, the qualified accommodations (village: sunflower, horse riding: horseshoe). Trainings for tourism service providers at the intermediate and advanced level and foreign language courses successfully contribute to the quality of entertaining guests.

The tourist organisations operating under the auspices of the county local governments, the Tourinform offices, and the civic organisations at the different settlements in charge of touristic and cultural activities assist in the coordinated promotion of natural and cultural values. These organisations mainly pursue programme organisations and provide local information. At the same time we can conclude that – in the different tourist regions – the coordination of the different attractions and their development into products shall be continued, and a stronger and more focussed marketing activity shall be put in place in coordination with Magyar Turizmus Zrt. As the concept of destination management is undergoing transformation all over the world, the development of the organisational system of tourism management and sale is of utmost importance. The competitiveness of a given area within a tourism region is increasingly defined by the



uniform presentation of tourist attractions in a geographically definable space (tourism space), and the role of individual, special products is also increasing.

To sum it up, competitiveness can only be improved significantly with the general development of infrastructure, with the creation of modern products and product packages, with efficient marketing activity, and with the development of a unique image and efficient operating conditions. However, no major breakthroughs can be achieved without creating an organisational and institutional background (both at government and at local level) of the organisation and management of tourism.