Design and development of touristic products

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1. Conceptual preliminaries

For a successful orientation in the world of tourism it is indispensable to look at the definition of tourism product. The expression “travel industry product [1] is something that one could come across in the Hungarian language literature in the 1980s, already. (The quotation marks were there in the original source text, it indicates that the authors used this trick to make the concept, not compatible with the economic mechanisms of socialism, acceptable.) Already then the essence of the product, i.e. attraction, was recognised. The authors emphasised that tourism product was actually a supply set, containing services satisfying the demands. The expression tourism product in international literature was taken over by Stephen Smith from the Anglo-Saxon marketing approach represented by Philip Kotler, and the concept has become widely used by now. Its penetration in Hungary is mostly due to the marketing plans published annually by the Hungarian Tourism Inc. and its legal predecessor, the Hungarian Tourism Service, the basis of which is the National Medium Term Tourism Marketing Strategy (1996–2000) approved in 1996. The conceptual marketing plan published in 1997 clearly states that the year of the millecentenary (i.e. the 1100th anniversary of the Hungarian Conquest) is an overture of up-to-date tourism development and tourism management. It is the year 1996 thus that is the starting point of the product-orientation of the Hungarian tourism sector.

Tourism product was then seen as the primary category of the development of the tourism supply, it was considered as a set of services aiming at the full satisfaction of the needs of the tourists, and based on attractions for the visit of which tourists arrive at the region. Its content was believed to be in transport providing access to the attraction, in accommodation, catering, entertainment, health, security, banking, communication and other services. Despite the fact that the lack of product inventory was recognised, on the basis of the already mentioned National Medium Term Tourism Marketing Strategy, 36 products types were categorised into 4 groups of products (business trips, wellness, special interests and beach tourism). At the definition of the product categories and the product types, behind the concepts there was an evident lack of theoretical background built on single norms.

The old, and somewhat incorrectly still often used word in Hungarian language for tourism is ‘idegenforgalom’, a mirror translation of German ‘Fremdenverkehr’, ‘foreigners traffic’

2. Macro- and micro-level interpretation of tourism product

Alan Godsave, former Eastern Europe representative of WTTC, in his presentation held on the 1997 general assembly of the Hungarian Tourism Society pointed out that tourism product can most accurately described by four A-s, i.e. each tourism product has four basic constituents: attraction, access, accommodation and attitude. The Hungarian tourism sector, due to the specific development and the concomitant belatedness, has always tried to emphasise complexity about the tourism product, so, beyond Godsave’s approach it also tried to integrate into the concept as many elements as possible of tourism infrastructure and superstructure, in fact, even some elements of the environment of tourism. Márton Lengyel warns us that if any service being part of a product is missing or is not of international quality, the region to be developed cannot be successful in tourism.

Figure 1. Relationship of a tourism product and the material conditions of tourism

For tourism product, literature on tourism marketing differentiates between a macro- and micro-level approach: at the micro-level the concrete services offered by a tourism enterprise can be seen as a tourism product (e.g. Hotel Gellért, a medicinal hotel offering complex services is a lead product of the hotel chain called Danubius), at the micro-level tourism product is actually a tourism destination itself and the thematic services offered to satisfy tourist needs (e.g. Hévíz as a bathing destination represents Hungarian health tourism). Starting from the latter interpretation, a tourism product is a potential set of services based on one attraction or several attractions,
satisfying all needs of the guests. In other words, a tourism product is the framework of the activities that a tourist can pursue in a given destination, from which a competitive service can be created in the ideal case. A complex tourism product involves the total of attraction, accessibility, catering and hospitality: when making the tourism product an effort must be made for the optimal use of the opportunities of tourism. The marketing of the product is done by the service providers, but their activity is assisted a lot by the national, regional or local level tourism marketing organisations (tourism destination management – TDM), who can also make a significant contribution to the development of the product as well. During the creation of most tourism products we have to consider their local relevance, which is related to the spatial differentiation of the attraction(s) making the basis of the products.

3. Categorisation of tourism products

When categorising tourism products, we make an effort – in addition to taking the existing traditions and international environment into consideration – to make people autonomously link the name of the product to a well describable, meaningful tourism activity (conference tourism, shopping tourism, equestrian tourism), or to a geographically well definable space which determines the behaviour of the demand (rural tourism, urban tourism) or to a group- specific market segment (youth tourism, senior tourism). We definitely deny the still alive vague definitions like hobby tourism, as these create confusion just about the central element of the product, i.e. attraction. Accepting the raison d’être of the tourism products existing on their own (cycling tourism) or collectively (active tourism) and the potential subjectivity in their categorisation, we draw attention to the fact that the concept of products must not be used as synonyms for the well-established types of tourism (leisure and MICE tourism) or the well-known forms of tourism (alternative and mass tourism). We also emphasise that the tourism products, even if they seem to be something very close to the packages compiled by travel businesses and offered in catalogues as beautiful as possible, must not be confused with the programme which is part of the product base; tourism product is at a much higher level of abstraction. In practice, a product offered by the given destination (e.g. equestrian tourism in the North Great Plain) appears as a well marketable product (field riding in the Hortobágy puszta).

3.1. Space-specific tourism products

A very important group of the tourism products, having a very good position on the international tourism market, are products made from the special characteristics of a space. In case of the so-called space-specific tourism products, the character of both the attraction and the infrastructure and suprastructure elements allowing the exploration and marketing of the attraction are closely linked to the space where the attraction originates from. The characteristic image of the spaces, they way the houses, streets and squares are constructed and located, the way they are filled with life as a result of the social division of labour and the abstract images that live in people’s mind concerning the given space and its historical past – these together make the attraction of tourism forms belonging to the category of space-specific tourism products, i.e. urban (city tourism) and rural (agro-, farm, village tourism). In addition, tourism products originating from the basically natural endowments of the surface, i.e. waterside and mountain tourism, also belong here. The former appears in connection with all kinds of waters, so it is possible to differentiate lake tourism, marine or coastal tourism and river tourism, while in the latter case (mountain tourism) the product is less differentiated. In our approach, ecotourism is also discussed among the space-specific tourism products, because the nature protection areas that ecotourism is focused on are space-oriented, beyond any doubt.

3.2. Group-specific tourism products

In tourism theory approach those groups are in the focus of product development which represent a demand significant internationally and feature more or less the same needs. The members of the so-called macro-groups of society (in a sociological sense) can have access, due to their belonging to the group, to economic, social and symbolic goods which they would get with more difficulties on their own, or they would not be able to acquire. Tourism industry soon realised the arrangement of needs along certain group-forming characteristics, and reacted by creating its supply to satisfy these needs. Experts dealing with the development of tourism products approach some groups in a social approach, others on pure business grounds, but a mixed approach is not rare, either. Among the group-specific tourism products, a lead position is held by the sets of services meant to satisfy the youngest and the oldest generations of society, so both for juniors and seniors a reception capacity adapted to the demand specific of their generations is created. In their case, product development is considerably promoted by the state intention to provide allowances in their tourism activities to these groups that are in a disadvantaged situation coming from their age-specific features. This way both the youth and the senior citizens
enjoy a state contribution to their travel costs. The group-specific characteristics of the tourism products can be seen in their constituent services (price, quality) and programmes. Especially the latter, i.e. the total of the supply elements built on attractions can be seen in the case of groups whose judgement by society is often burdened with challenges, so the satisfaction of the needs of nudist or gay people presupposes a group-specific approach in product development.

3.3. Activity-specific tourism products

Despite the fact that each tourism product bears in them the activity of their potential consumers manifested in mobility, night residence, eating, participation in programmes, spending etc., there are several products in the focus of which we find the characteristics of the tourist activity taking place during the use of the product. While in the case of space-specific and group-specific tourism products the relationship between motivation and tourist activity is more indirect, in the case of activity-oriented tourism products motivation has a much more definite role. In urban, village, eco-, waterside and mountain tourism, space is a kind of framework, an organising principle of the activities that tourists of the given location pursue; at group-specific products motivations coming from the age or sexual orientation of the participants are melted away during the activity in most of the cases. From the activity of a tourist participating in an urban sightseeing or another one spending vacation in a holiday complex reserved for gay persons it is not easy to conclude to the motivations behind the consumption of the given product. On the other hand, in the case of activity-specific products – like active tourism forms such as cycling tourism, equestrian tourism, water tourism or hunting tourism, and also shopping tourism, conference and health tourism – the relation between activity and motivation is more than evident.

4. Topical trends in product development

As a result of the changes taking place in the tourism market over the last decade – especially the saturation of travellers with traditional experiences, and technology development impacting the demand – potential travellers became more influenceable (as regards their access and their openness to new things) that new and creative products are relatively easily marketable to them, using an adequate marketing communication. As a result of the growing popularity of travel in leisure time, and of MICE tourism, a part of the society tries to avoid annually recurring experiences, they have no interest in seeing a few more castles, Greek theatres or galleries and they do not show much inclination for seaside resorts, either, so they can be susceptible to information on the internet, in newspapers, on the radio or on television on new tourism products. The tourism products promoted through the media are not always built, of course, on extremely novel ideas (touristic use of the arctic igloos inhabited by Eskimos), it is only the further development of existing products in many cases. A professionally developed product of cultural events placed in the focus of classic city sightseeings is the European Capital of Culture programme, which, since its start in 1985, has become a tourism products of the European Union regulated at the level of the Community.

The product can be interpreted at macro- and micro-level again, the former is the potential set of services, the latter being the tangible supply of a business. Among the macro-level products adventure tourism (due to its extremely rapid development), catastrophe tourism – inspired by the news strategy of the media –, and gay tourism already mentioned at the group-specific tourism products can be categorised as tourism products having gone through a development significant at international level. Among tourism products interpretable at micro-level, discount flights used in air transport or boutique hotels penetrating in the hotel industry should be highlighted, but the product level developments of the individual destinations should also be mentioned here (Oman, Muscat Seaside).

5. Tourism features of niche products

Experts engaged with marketing call those markets segments ‘niche’ in which a special product can be sold to a special group, without fierce competition (Ballai 2000). The task of niche marketing is to get the product developed for the selected target group to the most lucrative niche of the market. It takes extreme innovativeness to recognise a niche and cover the expenses emerging (Hjalager 2002), which can appear in the development of both tourism products and destinations. Either we look at the process of the building out of low-cost airlines (Dobruszkes 2006) or of the penetration of the electronic ticket booking system used in air transport (Shon–Chen–Chang 2003), the start of product development was the realisation of a niche (those costumers were perceived who were willing to abandon some services aboard, or for whom the collection of printed flight ticket personally was a problem). Similar processes took place during the development of certain tourism products (Michael 2002, Hughes–Macbeth 2005, Sterk et al 2006,) or some exotic destinations (Wade–Mwasaga–Eagles...
2001, Díaz-Pérez–Bethencourt-Cejas–Álvarez-González 2005), and in the marketing of accommodations (Pryce 2002) and the relationship of tourism and retail trade (Asplet–Cooper 2000) the utilisation of the opportunities offered by niche marketing was also observable. A feature of the niche market is the short life cycle of the product, as the narrow demand segment may broaden after a while, as a result of which the niche – having lost its original function – can be solved in the market. As a result of the diversification of activities involving the consumption of tourism products, the start of the alternatives appearing besides mass tourism can be traced back to the first steps taken to recognise niches and satisfy demands. When e.g. out of the bus city sightseeings involving masses on people and taking place on fixed routes, programmes organised for tourists interested in the special values of the cities (city quarters featuring different architectural styles and tomes, city parts offering antiques) were separated, this represents a niche. In Robinson’s and Novelli’s view (2005), each tourism product or place satisfying the demand of a relatively narrow segment should be seen as niche tourism product. The authors use the concept of niche tourism as a synonym of alternative tourism. In order to avoid conceptual overlaps they introduce the specifications macro- and micro niche, the former being the alternative tourism products in the broader sense (like cultural or rural tourism), the latter meaning the narrower side-branches of these (e.g. religious or wine tourism). In the interpretation of the niche they make a difference among geographical, product- and consumer orientation. It means that tourism products are the periphery (Grumo–Ivona 2005), wildlife (Novelli–Humavindu 2005), or outer space (Duval 2005), the geographical space, gastronomy (Hall–Mitchell 2005), transport (Hall 2005) or cultural heritage (Wickens 2005), while youth (Richards–Wilson 2005) and volunteers (Callanan–Thomas 2005) have become niches in tourism theory literature, due to the characteristics of the tourists.

6. Life cycle of the tourism product

The theory of life cycle was taken over from biology to economics and became a concept frequently used in management science. The theory concentrates, in addition to the temporal aspects of the development of the products, on those stations that require different marketing strategies. The matching of life cycle theory to tourism has not been free from criticism, because tourism products are strongly linked to the destinations; accordingly the environmental, social and economic transitions have a basic impact of tourists’ activities, the constituents of the experience and the characteristics of the product consumed. Of course, parallel to this the market segments consuming the specific destination also change – especially as regards their age-specific indices –, so those involved in the development of the product must face several challenges (internal and external factors).

It means that the life cycle of the tourism product is closely related to the development of the destination, whose characteristics were already analysed by Walter Christaller, and which were taken over to the main stream of tourism science by the work of Richard Butler. The destination life cycle curve can be related in the first place to the space-specific tourism products, i.e. urban, village, waterside, mountain and ecotourism, but the correlations to other products can also be examined. According to the hypothesis of the theory, in the growth of the number of people interested in a given destination a decline is also coded, as the mass consumption of space erodes attractions and the infrastructure providing access to them. Accordingly, the life cycle of a destination goes through the following phases: exploration, integration, development, consolidation, stagnation, decline/revival. The model, however, has too many weaknesses to be suitable for giving a generally valid explanation for the transitions occurring in the tourism destinations.
2. fejezet - Katalin Lőrinc - Gábor Michalkó: Urban tourism

1. From the Coliseum to the London Eye: historical preliminaries of urban tourism

1.1. The beginnings

As ancient civilisations were crystallised in settlements of urban character, most travels took place into or across the cities, so urban tourism can actually be called the archetype of tourism. Similarly to the cities of later times, ancient settlements too created recreational establishments for the entertainment of the local population, to allow them to pass their time – and these facilities were popular with the visitors as well. In Athens or Rome we can still see buildings that were constructed to amuse the inhabitants. Stadiums, Greek theatres and Roman amphitheatres were suitable to seat thousands of people, and those coming from a distance were accommodated and catered by the institution of mutual friendship or the boarding houses already operating at that time.

1.2. The dawn of the Medieval Times and the New Era

Medieval cities became the destinations of travellers mainly because of their trading functions, clerical life and the closely related educational functions. The medieval cities offered complex security, similarly to that of today’s plazas, to the tired travellers entering the former city gates, while they also tried to satisfy the leisure time demands of the local inhabitants. Cities protected people from the harassment of robbers, city inns and pubs, and the city marketplaces offered the thrill of social life to the travellers. Cities that held fairs of European recognition (e.g. Champagne) were often visited by merchants from faraway places, and the same was typical of port cities (e.g. Hamburg, Genova), whose traffic required the development of catering and accommodations. Pilgrimages oriented at or moving through cities due to the spreading Christianity also generated significant turnover for the cities involved (e.g. Jerusalem, Rome, Santiago de Compostela). Church did not only contribute to the maintenance of the holy places but also the organisation of education, so student mobility to the first European university cities (e.g. Bologna, Paris, Oxford) also had a religious touch. The movement starting in the early 17th century and fading away in the middle of the 19th century, the Grand Tour that mostly concerned the children of the British aristocracy, also generated significant turnover for the cities involved (e.g. Jerusalem, Rome, Santiago de Compostela). Church did not only contribute to the maintenance of the holy places but also the organisation of education, so student mobility to the first European university cities (e.g. Bologna, Paris, Oxford) also had a religious touch. The movement starting in the early 17th century and fading away in the middle of the 19th century, the Grand Tour that mostly concerned the children of the British aristocracy, also generated significant turnover for the cities involved (e.g. Jerusalem, Rome, Santiago de Compostela). Church did not only contribute to the maintenance of the holy places but also the organisation of education, so student mobility to the first European university cities (e.g. Bologna, Paris, Oxford) also had a religious touch. The movement starting in the early 17th century and fading away in the middle of the 19th century, the Grand Tour that mostly concerned the children of the British aristocracy, also generated significant turnover for the cities involved (e.g. Jerusalem, Rome, Santiago de Compostela). Church did not only contribute to the maintenance of the holy places but also the organisation of education, so student mobility to the first European university cities (e.g. Bologna, Paris, Oxford) also had a religious touch. The movement starting in the early 17th century and fading away in the middle of the 19th century, the Grand Tour that mostly concerned the children of the British aristocracy, also generated significant turnover for the cities involved (e.g. Jerusalem, Rome, Santiago de Compostela). Church did not only contribute to the maintenance of the holy places but also the organisation of education, so student mobility to the first European university cities (e.g. Bologna, Paris, Oxford) also had a religious touch. The movement starting in the early 17th century and fading away in the middle of the 19th century, the Grand Tour that mostly concerned the children of the British aristocracy, also generated significant turnover for the cities involved (e.g. Jerusalem, Rome, Santiago de Compostela). Church did not only contribute to the maintenance of the holy places but also the organisation of education, so student mobility to the first European university cities (e.g. Bologna, Paris, Oxford) also had a religious touch.

1.3. The time of the industrial revolutions

The birth of modern urban tourism – in the present sense of the word – only became possible with the coming of the age of the industrial revolutions. A parallel process to industrial revolution was urbanisation. A growing share of the rapidly increasing population became urban citizens, and in the late 19th century there were at least 16 cities in Europe with population in excess of one million. The characteristics of modern manufacturing industry and of urbanisation, especially the monotony of work and the crowdedness of the big cities were off-putting for the inhabitants who longed for spending their holidays far from the cities, preferably in nature. Productivity led to the increase of wages, and the savings of the people allowed them to leave the city, even though for only a short time in the beginning. All this was allowed by the penetration of the railway transport; regular railway lines were in operation between Liverpool and Manchester from 1830 on. Parallel to the centrifugal force making urban dwellers leave the city there was another force, one attracting people to the developing and modernising big cities; people visiting the cities became co-consumers of the urban leisure and cultural facilities that were meanwhile established. The financiers of the city hotels in good transportation locations, often next to the railway stations were just the railway companies in the beginning, as they were interested in the increase of the usage of the railway lines by the provision of accommodation[1]. The recreational sector made for the servicing of the ever growing population of the cities and the extremely rapid industrialisation were further factors promoting leisure and business travels, so most cities were not only the
source but also the destination of those seeking recreation and business opportunities. World expos organised regularly after 1851 and the millions of visitors who came to see them were the proofs of the attraction of big cities.

<table>
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<tr>
<td>1879</td>
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<td></td>
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</table>

Table 1. Locations of the world expos organised between 1981 and 1900 in Europe. Source: www.wikipedia.org

[1] The process is similar to that of the construction of the first American amusement parks, which were built by the companies operating city tram lines in the vicinity of the destinations of the lines (courtesy of Rátz, Tamara).

### 1.4. 20th century

Urban tourism starting to unfurl in the 19th century reached maturity in the 20th century. The explosive development of travel devices culminates in the cities, railway and coach stations, highways and later motorway junctions; airports mediate masses of interested tourists who are served by the more and more international hotel and catering industry. Casino cities appear (e.g. Monte Carlo), as do holiday resorts (e.g. Nice), bathing resorts (e.g. Karlovy Vary). The cultural development of the cities, theatres, cinemas, exhibition halls, venues suitable for the organisation of conferences, the appreciated supply of baths would all focus attention to the cities that in the second half of the century were engaged in a sharp competition to win the favour of the domestic, the European and the overseas tourists. By the 20th century big cities became capable of fully satisfying tourists’ needs, the gradually declining manufacturing activity of the cities are replaced by leisure services, factories and manufacturing facilities are replaced by parks and shopping centres.

### 2. Supply of urban tourism

#### 2.1. Attracted by the cities

To be able to answer why tourists are so keen on visiting cities, we have to understand the reasons behind. Tourism is a deconcentration phenomenon, people involved in it run away from the crowdedness of urban life, as urban existence in itself spurs the desire for dispersion. Nevertheless some authors see the significance of big city areas in the fact that in such zones entertainment facilities and sight of interest, satisfying the needs of both tourists and local inhabitants, are geographically concentrated. Tourists are attracted to the cities by those special functions and services which are offered for high quality leisure time entertainment. In our opinion, the *diversity and versatility* of urban zones is a motivation of travel in itself. Cities are of different nature, they are diverse and versatile as regards their size, image, geographical endowments, roles, or cultural heritage.

In summary, cities are:

- places of high population density, with a high probability that visiting friends and relatives will motivate travel and generate consumption,
- junctions and destinations of tourists flows, with a gateway function to arriving and leaving travellers, so the number of guests arriving at the cities can stabilise at a high level out of tourism season as well,
- industrial, commercial and financial concentrations and also the scenes of quality services, so many visits are related to work in the city (business trips, conferences, exhibitions etc.).
• settlements with a broad cultural offer for guests, accordingly they attract tourists interested in culture.

Experts agree that cities are visited by tourists primarily for the diverse supply of leisure time products and services, compared to the supply of other settlements or regions, by which the most varied market demands can be satisfied. Cities thus are areas where tourists, despite the fact that they have arrived with one single purpose, will carry out unplanned activities as a consequence of the large-scale concentration of leisure time services.

2.2. Tourism infrastructure

Infrastructure utilised in urban tourism is closely intertwined with the leisure facilities of the local inhabitants and is geographically integrated into the regions with residential function. In urban tourism dynamic and static infrastructure are equally important. The former category consist of facilities architecturally fixed to a location – regarding their function they are mostly buildings –, while the latter means special transport tools that allow the access to the attraction and to get to know the city as a whole.

Among the static elements of urban infrastructure a special emphasis should be placed on the tourism facilities connected to culture in the broad sense, to health, sports, and business and academic life. As cities are the number one destinations of cultural tourism, the different facilities in their territory – exhibition places (museums, exhibition halls), performance and event venues (theatres, concert halls of popular and classical music), holy places (cathedrals, synagogues) – will allow a very broad circle of tourists to consume the attractions (e.g. British Museum, Pompidou Centre, Milano Scala, Palace of Arts in Budapest). Medicinal and thermal spas are pilgrimage places of medical tourism in Europe, medical waters in the cities concerned become utilisable by the bathing facilities (e.g. Vichy, Baden, Spa, Budapest, Karlovy Vary). Several cities boast of excellent sports facilities that allow(ed) the organisation of prestigious international events including world championships or even Olympic games (e.g. London, Paris, Athens, Stockholm, Berlin, Munich, Antwerp, Amsterdam, Helsinki, Rome, Moscow, Barcelona). Cities are venues of business and scientific events, in their congress centres meetings on the most varied topics are held.

Special means of transport categorised as dynamic infrastructure secure access to the hardly accessible part of the cities, and also allow visitors to see the whole city as a single attraction. In the case of riverside or coastal cities such tools are cruise and excursion ships that take tourists to farther points, to an island, or maybe give them a wonderful view over the respective city. Beauties of the landscape are shown by the chairlifts, funiculars, lifts that offer a view over the city from a higher elevation. Also, such elements are special buses that allow seeing the whole of the city within a relatively short time (hop on – hop off).

2.3. Tourism suprastructure

Tourism suprastructure safeguarding the accommodation and catering of guests and the satisfaction of their miscellaneous needs shows a very much heterogeneous picture, albeit showing some regularities as well. The urban characteristics of hotel and catering industry making the primary suprastructure can be seen in luxury and in the satisfaction of more short-term demands. As regards retail trade seen as secondary suprastructure, it is elegance and complexity that should be highlighted.

Some of the international hotel chains definitely seek busy big cities for the operation of their units, among which there are many hotels in the luxury category. Such a hotel chain in e.g. Ritz(Carlton), with units in only a few of the European capital cities: Berlin, Moscow, London and Madrid, but the chain called Four Seasons is also positioned in this category, with five-star hotels in Budapest, Prague, London, Paris, Dublin and Lisbon. When talking about the primary suprastructure of city tourism, we must mention airport hotels located within the administrative boundaries but far from the centres of the cities. Typical big city units of catering industry are fast food chains (McDonald’s, Burger King etc.), whose operational feature is that they require relatively large markets for an economical business.

A typical leisure activity of guests arriving at big cities is shopping, which typically used to take place in scenic shopping streets or in luxury department stores (like Lafayette, Harrods, KaDeWe), but in modern times plazas, shopping centres offering all services in one single spot, have entered the market and now serve tourists with souvenirs. We must not forget the marketplaces of the big cities, either, it is especially second hand markets that are popular with tourists.

3. Demand of city tourism
3.1. From cities to cities

The urbanisation processes starting parallel to industrial revolution are still going on, as indicated by the continuous growth in the number of settlements that are towns and cities in legal sense and in the proportion of people living in them. Seventy per cent of the European population lives in towns and cities. As a consequence of this, the majority of potential travellers who are the demand are urban citizens themselves, so they have daily routine in how to use urban community spaces, how to consume the city. The impact of urbanisation on tourism can also be seen in the (qualitative) urbanisation of settlements, i.e. in settlements trying to be like cities as much as possible in their image, functions and services, as a result of which the urban dwellers find themselves surrounded by a more and more urbanised supply of services in the settlements. The space where urban travellers do not come across towns or cities is shrinking. Parallel to this, urbanisation is impacted by globalisation, visible not in the morphology of the settlements in the first place, rather in the functions and the supply of services. As consumption habits are becoming uniform, travellers come across representatives of international brands not only in the so-called global cities, the economic, financial and innovation centres of the world, but also in any simple big city. Roads running from the airports to the city centres are the best evidence that cities cannot avoid globalisation; we see also abroad giant signs advertising the same products, we can see the same hypermarkets, the logistic centres of the same brands, the same hotel chains etc. In fact, globalisation has reached by now the city centres (McDonaldisation), and even the cultural and historical attractions (Disneyfication). In maintaining the demand, a dominant role is played by the demonstration of the local values and interests that manage to overcome the fight between the global and the local.

3.2. A potpourri of motivations

A special feature of the demand of city tourism is that it is difficult to define those groups and their characteristics that would allow the exploration of the motivation of people with a definite intention to travel to the city. A closely related issue is the attractiveness of the cities, i.e. the traits of city tourists and the character of the attractions of the cities have similar roots. As the intention to travel is rapidly growing, and the cities securing the receptive capacity of tourism are developing, it is obvious that most tourists are channelled into the cities. This is a fact even though we can see a parallel phenomenon: today’s travellers are keen on having extra-urban experiences – nevertheless every now and then they still have to touch the urbanised environment that they want to avoid.

While it is relatively easy to explore the motivations behind medical tourism, shopping tourism or conference tourism, it is hardly possible to outline the motivations of city tourism, just because of the diversity of cities, their complex supply, cultural variety, the generation, ethnic and social differences of the urban inhabitants, the diversity of urban architecture etc. A fact further complicating the situation is that cities are concentrations of economic and political power, the centres of science, so in addition to the motivations of leisure travels we also have to take the demand of MICE tourists into consideration. MICE tourists, using the leisure opportunities offered by the cities, may arrive, besides their original motivation, with a second or third motivation, which makes the theoretical clarification of motivations of travellers visiting cities problematic. The diverse motivational backgrounds of the city tourists are further enhanced by passers-by who, using the transport connections (possibilities to change), temporarily consume the city, but this temporariness is enough to see the major attractions and use some of the catering facilities (it is especially airport transfers and delays that allow passers by to have up to 6-8 hours for sightseeing).

Regarding that monofunctional cities in the touristic sense of the word are less and less frequent, it is very difficult to filter out those arriving with an individual motivation. Exceptions are cities with a single medical tourism attraction (Spa), or utilising some unique cultural asset (Salzburg), organising international sport events (Innsbruck) or annually recurring festivals (Bayreuth), having educational institution of international recognition (Oxford), accommodating manufacturing facility of some unique product (Meissen) or functioning as a holy city (Fatima). The majority of tourists visiting these cities travel to the destination for the tangible supply or to experience the associations related to the city, and they less typically have second or third motivations. Expert also point out, however, that these cities have less visitors that regional centres or other commercial centres, industrial and port cities that may lack such characteristic attractions.

3.3. Touristic behaviour of city tourists

The touristic behaviour of the city tourists, i.e. their activity in the destination visited has several special characteristics. City tourists consume a space that is the most intensively used living space of the local inhabitants and the commuters from the agglomeration (the countryside); these are spaces where hundreds of
thousands or even millions of people work or pass their time daily. Consequently city tourists do not move in an isolated space, their activity is difficult to separate from the everyday lives of the locals. Another very important element of the behaviour of city tourists is related to time, which partly comes from seasonality and partly the duration of stay. Seasonality is hardly palpable in urban tourism, as the majority of cities can be taken as products consumable at any time of the year. If seasonality appears in cities, this does not necessarily come from weather or the connection of some services to a particular season, it is much more due to holidaymaking habits. As regards the duration of the use of urban spaces, we can say that city tourism is one of the tourism products generating the shortest length of stay. As opposed to holiday tourism often reaching 6 to 7 nights, in cities guests rarely spend more than 2 or 3 nights, but stays of less than one day are also typical. Tourists involved in the latter category are often called hyper-tourists by some experts, as they practically rush across the cities of their choice (which of course is also generated by the very high price level typical in the respective city, in Venice e.g. both catering and hotel facilities are rather expensive). To sum it up, four characteristic features of the touristic use of the city must be highlighted, namely

- selectivity;
- fastness;
- repetition; and
caprice.

4. The market of city tourism

4.1. Trends impacting urban tourism

The success or the failure of urban tourism is significantly influenced by the factors that have impact on the development and modernisation of the cities, the development of supply, on the one hand, and the ones that affect motivations, income positions, leisure time of visitors, i.e. the appearance of the demand, on the other hand. Urbanisation that has been mentioned several times in this study is definitely to be mentioned among the trends supporting the development of urban tourism, not because of the increase in the number of settlements that are towns and cities administratively, in the first place, but due to the improvement of the already existing basic and touristic infrastructure of the cities. The modernisation of railway stations and airports, the building out of state-of-the-art, telecommunication supported car parking system, the construction of motorway junctions, the enlargement of the areas involved in community transport and the ICT developments are all investments promoting the access of the big cities and encouraging consumption. We must not forget, either, that the new investments of service and leisure time industry and the quaternary sector (research and development) also have an inclination to settle in big city locations, where the economies of scale and the supply of labour force are secured. These facilities are of course utilised not only by the local inhabitants but also by those visiting the city, so the modernisation of the cities is a factor promoting tourism as well.

Among the trends impacting the demand of city tourisms, demography, health consciousness and the role of leisure time should be selectively discussed, together with the increased demand for culture and security. It is especially the European travel trends that suggest a growing market share of the elder generations who demand comfortable and enjoyable tours, so instead of longer and tiresome journeys they will seek shorter, more comfortable and more varied programmes, and in this segment cities have a competitive edge. A consequence of health consciousness is that travellers think twice before they expose themselves to harmful sunshine, which might decrease the interest in holidaymaking; some of the tourists will seek protection offered by buildings and parks in the cities. The decrease in the number of population will bring about the preference of more frequent but shorter holidays, which will strengthen the positions of cities offering such experiences and cheaply accessible by low-cost airlines. The increasing schooling of the population and the spread of the principle of lifelong learning will be coupled with the desire to have cultural experiences, so cities as the headquarters of culture will become even more popular as a result of this trend. The highly regulated character of the city life, the keeping of the conventions safeguarding the coexistence of masses of people will guarantee in itself safety in the cities.

4.2. An international outlook

The successful operation of urban tourism is indicated by the existence of the touristic suprastructure, primarily the quantitative and qualitative indices of commercial accommodations on the one hand, and their utilisation, i.e.
the number of guest nights, on the other hand. Of course tourists arriving at cities can spend the nights at other accommodations, and in many cases they spend less than one day in the destination, which makes exact the assessment of the turnover difficult. Because the market for urban tourism is based on the use of commercial accommodations in the first place, especially hotels, this is the index that we take into consideration.

Figure 1. Number of guest nights in the capital cities of Europe, 2008

In a European dimension London is the most visited tourist city, followed by Paris and Rome. On the basis of the number of guest nights registered at the commercial accommodations of the European capital cities three sharply different settlement groups can be distinguished: settlements with tens of million, with millions and with hundreds of thousands of guest nights. In 2008 there were only 7 capital cities with at least ten million guest nights (in addition to the already mentioned capital cities of Great Britain, France and Italy, these cities were Berlin, Madrid, Prague and Vienna), most capital cities fall into the category of millions of guest nights, while only some of them have a few hundreds of thousands of guest nights (Bern, Luxembourg and Ljubljana). In most cases the capital city is also the city with the largest number of guest nights in the respective country, but it happens sometimes that the administrative centre is not the most visited touristic destination (like in Spain or Switzerland). In the majority of the capital cities of Europe it is international tourism that prevails, while in countries with traditionally strong internal demand the administrative centre is also visited by domestic tourists in the largest numbers. Accordingly, in Berlin, Oslo and Stockholm it is domestic, in Brussels, Ljubljana and Luxembourg foreign tourists who are dominant (international demand is over 90% in the latter capital cities).

**4.3. An outlook in Hungary**

Cities, especially the capital city have outstanding positions in the tourism of Hungary. Budapest has been the most visited Hungarian tourism destination for decades, but the bulk of the guest nights registered are generated by international demand.

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<td>(894/5266)</td>
<td>(737/4665)</td>
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<tr>
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*Table 2 Most popular Hungarian cities on the basis of the guest nights registered, 2005–2009 (Domestic/International guest nights, 1000) Source: HCSO*

Besides the capital city of Hungary it is usually bathing resorts (Hévíz, Hajdúszoboszló, Bük, Zalakaros, Sárvár), Siófok as the number one destination of holidaymakers, and cities showing the signs of urban tourism – Eger, Sopron and Debrecen – that are the most popular touristic destinations.
5. The environment of urban tourism

5.1. The reflection of the environment of urban tourism: quality of life

When exploring the impact of tourism on the quality of life, big cities should be comprehended as an environment where the use of the space by the tourists and the local society, and the vector of the related spiritual processes are all connected to the basic functions of the settlements. When we start from the categories used in the model by Partsch, the provision of the space of residence, work, leisure, supply, education, transportation and communication is the number one function of the big cities. Successful tourist cities devote enormous energy to operating the basic functions in a way that gives maximum satisfaction to both local inhabitants and the visitors to the respective settlements. While each of the basic functions of the big cities in themselves may have dominant role in the quality of life of the local population, it is usually their complexity that impact spiritual processes. This difference is basically due to the consumption of the settlement with different motivations and intensity: big cities are relatively stable living place for the local society, but only a temporary place of residence for the tourists. Consequently tourists are much more likely to relate to the total of the basic functions of the big cities rather than to the individual functions.

Among the most liveable cities of the world, we find European cities on the top of the list. On the ground of an indexation that takes New York as the basis, among the top ten cities there are three from Switzerland (Zurich, Geneva and Bern), three from Germany (Düsseldorf, Frankfurt and Munich) and one from Austria (Vienna), which definitely shows the correlations between liveability and order in the good sense of the word (functioning settlements with efficient self-governance, made by a community accepting and enforcing the rules). In the first 50 positions of the list comprising of 215 settlements, 23 can be found in Europe, without one single settlement from a former socialist country. It is also worth mentioning that in Europe it is not always the capital city that shows the most liveable character, it is often smaller regional centres (Zurich in Switzerland; Düsseldorf in Germany; Barcelona in Spain). It is also striking that the majority of the liveable cities are very popular tourism destination as well, so the increased interest of the foreigners in the respective cities is a blessing and a curse at the same time for the local society.

5.2. A tourism policy approach

The social, economic and infrastructure environment of urban tourism is reflected in the quality of life of tourists and the local inhabitants as well. Among the elements making the market of urban tourism it is politics that seems to be the factor capable of influencing other elements, including the product itself. A characteristic feature of urban tourism is that, unlike in the case of other tourism products, national policy is less able to impact its successful operation, while local policy has a much stronger impact on that. While e.g. the development of medical tourism can hardly take place without the active role of the state, the investments
promoting the competitiveness of urban tourism are affordable by the city governments. The individual development needs do not allow and do not require, either, the intervention of national policy. Exceptions from this are capital cities and regional centres that have a gateway role in the tourism of the given state or region, so they play a role not only in the management of tourist flows but also in shaping the touristic image. Other exceptions from this rule are cities with international or universal attractions, especially the ones with world heritage title or temporarily serving as the location of some events of international relevance (e.g. European Capital of Culture, Olympic Games). National governments or regional management in such unique cases can contribute to the desirable growth of the number and spending of tourists by the development of infrastructure and suprastructure in the respective city and the promotion of its marketing communication.

If local policy recognises the opportunities lying in urban tourism, it can promote the realisation of the diverse activities of tourists arriving at the destination by the complex development of tourism supply. Beyond the political will it can also be assisted by the positive attitude of the local entrepreneurs and the local community (inhabitants, professional and non-governmental organisations). Doe the complexity of urban tourism, product development can only become successful with a single political background, because the individual attractions and the tourism infrastructure built on them must be constructed – or adjusted to the needs of the demand – in a balanced way, in accordance with the local interests. If the political elite of a city implements a single-pole product development in which one of the attractions enjoys a long-term priority, it may lead to a single-theme supply (bathing city, cultural city etc.) and decreases the chances of the creation of a diverse urban tourism sector.

In Hungary’s tourism policy urban tourism enjoys priority inasmuch as Budapest is one of the leading destinations, and the development of the touristic supply of the capital city is the interest of the national government. The Hungarian National Tourism Development Strategy emphasises that Budapest is a destination of international attraction whose development is a tourism policy priority, so the tourism destination management organisation of Budapest must be created on the basis of the Tourism Office of Budapest Non-profit Ltd. in the first place. As regards Budapest, objectives of selected importance include The touristic use of the world heritage sites; Creation of the bathing city image; The increase of the recognition of Budapest as a congress venue and Implementation of a fizzy cultural life. Hungarian tourism policy sees, in addition to the capital city, the small towns accommodating attractive scenes of cultural heritage as the places to be developed in urban tourism, small towns where visitors find historical city centres, cultural world heritage sites, major museums, groups of buildings of monument value, selected festival and conference venues and other sights of interest that can be organised into networks.

6. Cooperation of urban tourism with other tourism products, synergy effects

6.1. Central roles, individual products

Tourism taking place in an urban environment presupposes the co-existence of several products. Although cities, coming from their central roles, try to offer as wide a range of services as possible, this will always have limits. The competition of urban destinations requires of each settlement to create their own products and to build their names and image on this individual endowment, the USP (Unique Selling Proposition).

When discussing the primary motivation of urban tourists, within leisure tourism it is medical tourism, shopping tourism, cultural tourism and active tourism that come first; looking at business tourism it is conference tourism, and tours made with business and learning/educational purposes that are the most important. The identification of culture as a factor of development is a several times proven fact, supported by cultural tourism in the broader sense of the word, cultural tourism experienced in the urban space. This type of product includes branches of traditional culture such as heritage (monuments, built heritage, memories from the past) and arts (fine and performing arts, literature, contemporary architecture) and also activities related to lifestyle (legends, traditions, gastronomy, folklore) and creative industries (fashion, graphics, design, media, entertainment) (WTO-ETC 2004).

6.2. Growing popularity of medical tourism and health industry in the cities
For the ageing European (and Hungarian) population medical tourism, quality medical services and the development of the conditions of regeneration are of special importance. Health consciousness, the growing awareness of the preservation of wellbeing and the prevention of diseases is a more and more typical phenomenon, enlarging the target group of medical tourism services. Prevention is given a bigger emphasis. In addition to active employees it is the pensioners who are dominant, but the range of services used and the length of use are different. The elder generation usually prefers smaller towns with less visitors, they like travelling in pre- and post-season and prefer medical hotels (or accommodations close to the medical spas). The accessibility by public transportation is of vital importance for them (coaches or trains), as are the provision of transfer and the existence and look of parks and walking paths. In Hungary such destinations are Hévíz, Zalakaros, Hajdúsábozoszló and Gyula; popular bathing resorts in the Czech Republic are Karlovy Vary/Karlsbad, Mariánske Lázně/Marienbad and Františkovy Lázně/Franzesbad; but there are several Austrian and Italian bathing reports of this type as well.

Active employees are more interested in wellness tourism satisfying the needs of conference tourism, and these venues are splendid destinations for company (further) trainings as well. Those who use this kind of service usually spend a weekday or two (at conferences and further trainings) or a longer weekend, maybe a brief holiday (leisure tourism) in wellness hotels. There is a demand for attractions other than medical tourism services to contribute to the pleasant stay of the guests; so cultural attractions offered by the cities, especially if they are easily accessibly on foot (Vienna, Prague, Dubrovnik, Porto or some Hungarian venues like Balatonfüred, Siófok, Sopron, Eger, Pécs, Szeged, Debrecen) are ideal complements for medical tourism.

In urban environment medical tourism is a special type of supply, which includes non-hospital treatments (e.g. surgeries, dental treatments, and beauty surgeries, laser treatments), but these services can only be categorised here if they are accompanied by the use of touristic services such as accommodation or catering. Middle and big cities can basically join in the competition by the continuous development of complex medical tourism services (hospitals, special surgeries and outpatient treatments), the keeping of well-trained physicians and – in addition to rapid accessibility – the low level of the price of the treatment (price advantage). In Hungary good examples for dental tourism are, in addition to the capital city, Sopron, Mosonmagyaróvár and Veszprém; one-day surgeries are concentrated in Budapest.

### 6.3. Cultural experiences

Urban spaces can also be taken as cultural junctions where built heritage and cultural events are the most important attractions. Although there is a constantly growing interest in the visits to events with international attraction, it is still sights of interests, monuments and museums that are the most popular among the cultural activities, together with city sightseeing tours, the “experience of the atmosphere” of the destination, the tasting of local food and beverage specialities and shopping. The award of the “European Capital of Culture” (Pécs, Linz) or “world heritage” title (Brugge, Lisbon, St. Petersburg) will further increase the number of visitors and strengthen the image of the cities. Several (European) cities have used this title to renew their cultural life and make themselves known all across Europe.

The whole world in a festival – as the saying goes, and indeed, cities concerned devote significant efforts to increase the popularity of the festivals and enhance the efficiency of their communication (Budapest – Sziget Fesztivál, Salzburgerfestspiele). There is a fierce competition for the organisation of international (sport) events, Olympic Games (Beijing, London), and a successful event will also result in total renewal of the touristic infrastructure.

### 6.4. MICE tourism – the age of conferences and business meetings

Guests of the conferences are the lead representatives of their professions, so this kind of tourism generates the development of other branches as well. A conference will increase the recognition, the fame of the respective city; in addition, MICE tourism usually takes place outside the main tourism season. Besides higher spending, another advantage is that conference guests usually participate in optional programmes (visiting cultural attractions) or will return to the same destination as leisure tourists. Trends show that it is physicians’ and engineers’ conferences whose number is increasing. The most popular conference cities of the world (IUA 2007) are Singapore, Paris, Vienna, Brussels, Geneva, Barcelona, New York, Tokyo, Seoul and Amsterdam. The evaluation of Budapest (with position 21 in this rank) is good, but the absence of a competitive congress centre is a frequently mentioned problem.
Although the explosive spread and development of communication and informatics tools has resulted in many cases in the decrease of the number of business trips, personal encounters and exchanges of experience are still needed, as are the maintenance of the business relations and trust. Business meetings are usually organised in the hotels and restaurants of (capital) cities and regional centres; also, more and more frequently in the own office of the company (organisation). In the case of incentive tours organised into cities of special atmosphere, organisers mix the speciality of cultural endowments with high level services (Venice, Barcelona).

7. Product development in urban tourism in practice

7.1. Accessibility, transport, parking

The rapid access of cities (in domestic relation by car, coach or train; in the case of inbound tourism by plane) is a key issue. In order to decrease travel time from the areas of origin as much as possible, regional projects are needed to promote the establishment of reception facilities with a substantial capital investment (roads, airports, railway terminals, accommodations). Within the (inner) city, on the other hand, all efforts must be made to promote the use of advanced (alternative) means of transport at the greatest possible level (bicycle, walking, motorised mini-car). Transport tools meeting the ‘genius loci’, the local spirit (e.g. horse carriage, old trams, chairlifts or tourist trains) are important sources of experience especially in the historical cities.

Within monument buildings it is often problematic to allow the movement of the physically handicapped, the elder people and families with small children. In each case, even at the cost of the preservation of the original shape of the building in justified cases, the expectations of the modern times must be met, not last because the ever growing share of the ageing population and the tourists will demand the use of elevators and wheelchair ramps designed and implemented aesthetically and functionally.

7.2. “Selling the city”: innovative solutions in settlement marketing

A key to the success of settlement marketing is to have those formal and informal spaces of community life where the local citizens, non-governmental organisations and stakeholders themselves can intervene into the solution of the problems concerning the local communities. The “maturing” of the local society is a prerequisite for bottom-up organisation, for the birth of communities that are able to learn, open and receptive. An important issue is the creation of communication channels, the measurement and evaluation of the feedbacks from the target groups addressed by settlement marketing.

Tourism marketing realised within settlement marketing has paid most of its attention so far on (potential) tourists, but this approach seems to be worth reconsidering, research findings suggest. Among the motivations of domestic leisure travels concerning the cities, visiting friends and relatives is a more and more important one, also, the recommendations of friends, relatives and acquaintances and the opinions read at community websites are appreciated when making travel decisions on destinations to visit. It is obvious then that for settlements with tourism development ambitions, communication with the local inhabitants will be very important, in order to allow the advertising of the elements of tourism supply and strengthen visitor-friendly behaviour.

During the selling of tourist cities, more and more frequently used tools are the cards offering reduced prices for tourists. The establishment of the card system takes into consideration the average length of stay of tourists (cards valid for 24, 48 or 72 hours), supports the use of community transport and inspires tourists with sales promotions to visit the sights of interest offered by the city. A further benefit of this card system is the increase of the number of visitors to attractions that are parts of the built heritage of the city; the actual movements of tourists in the respective destination become measurable, and the system also promotes spending and the use of other services in the settlements. In Hungary a good example for such a benefit card system is Budapest, in Austria it is Salzburg that should be mentioned.

The hunger for information of cultural tourism visible in the cities can be fed e.g. by the Intelligent City Guide System. It is designed to give the travellers basic information, with the use of the Internet, right at the planning phase of the tour, in order to allow them to make decisions on the destination of their travels. The system assists those individual tourists in the first place who couple the joy of experience and exploration with organisation made by themselves.

7.3. Tailor-made information
An essential part of hospitality is the provision of touristic information, including personal client services (in buildings reminiscent of the age of the attraction, or in modern buildings but with a central location); information signposts (in a style matching the image and the historical atmosphere of the city: brass signs, coats of arms and wrought iron holders); and visitor centres located in the vicinity of the attractions generating considerable traffic. When establishing a visitor centre, efforts must be made to create interactivity and have tailor-made products (linguistic diversity; segmentation by age and cultural background). The high quality of experience can be secured by stimulating as many senses as possible (besides sight, hearing, touching, smelling or tasting should also be targeted), relying on the active cooperation of the visitor an interesting island of knowledge can be created (good examples for which are the visitor centres of Herend, Köszeg or Pannonhalma).

The use of the sources of information in 24 hours of the day is assisted by a number of new technical devices. In addition to information signposts located at traffic junctions (touchscreen terminals), the free access to internet in public spaces (public institutions, during festivals) is becoming more and more popular. By the development of the touristic sites (easily comprehensible menus, information in different languages, route planning, online accommodation booking, and downloadable publications), tourists will feel themselves more informed and safe.

7.4. The role of community spaces and local inhabitants

The use of the historical city cores as community spaces is a great challenge; it is partly connected to the regeneration of (Hungarian) inner cities, which raises issues for transportation, traffic management, the construction of a single cityscape and also functional issues. The problem of the emptying inner cities is not only an economic or real estate management issue, so it should be integrated with community development, and the satisfaction of the demand of local social groups (youth, family persons). Inner cities are excellent locations for the reception of culture in the broad sense of the word (see the section on the comprehensive interpretation of culture). Interactive museums or exhibitions (in a changed role); attractive events, festivals; parks, playgrounds, restaurants, cafés suitable for stopping, having a conversation or recreation can appear as events or programmes for consumers (both local inhabitants and tourists).

The quality of the experience of visitors is basically determined by the quality level of the services, so attention must be paid during product development to the satisfaction of the visitors. Visitor friendly behaviour, cordial and polite servicing, helpful attitude are fundamental requirements against all those who get in touch with the guests. Tourism management has a vested interest in paying attention to the information and encouragement of the local society and the employees in tourism and to working out special (client communication) training programmes.

7.5. Harmonised tourism management

In the case of cities, joint efforts, thinking in networks and partnership are issues especially appreciated. In addition to the development of the attractions special attention must be paid to logistics issues (transport facilities and car parking places), the quality of urban environment (transport safety, parks, walking paths, cleanliness) and the adequate supply of recreation zones (entertainment, shopping, active leisure programmes).

8. Research on urban tourism

Despite the fact that cities are the most visited destinations in world tourism, after seasides, relatively little attention – less than would be justified by the weight of the activity – has been paid so far to the researches of urban tourism as a tourism product. This topic is the research field of experts dealing with urban geography, urban sociology and the so-called (urban studies, but, due to the transdisciplinarity of urban tourism almost all disciplines within social sciences, e.g. history, cultural anthropology, marketing) are involved.

In answering the open questions of urban tourism, a useful starting point may be statistics, but the differences in the data collected (methodology, use of the concepts etc.) and the “reporting reliability” make comparisons rather difficult even within the European Union. Researchers can download statistical data concerning the tourism of certain cities from the database called TourMIS, maintained with the collaboration of the European Travel Commission, but the analysis is hindered by the fact that the stakeholders of not all cities participate in the construction of the international database with the same “enthusiasm” and professionalism.

Regular analyses concerning urban tourism behind the statistical data supply are negligible, the greatest help to academic work are the studies published by the professional body aggregating the tourism offices of the European tourist cities, FECTO (European Cities Marketing). The reports published by the organisation are
usually publications revealing the findings of market research studies assisting marketing communication tasks in the first place.

In Hungary regular researches on urban tourism started in the middle of the 1990s. The researches carried out in the Geographical Research Institute of the Hungarian Academy of Sciences were concentrated on Budapest and tried to explore the relations among the groups involved in the tourism of the Hungarian capital city (tourism policy of the individual districts, crimes committed against foreign citizens, renting of private accommodations etc.) with the tools of social geography. The findings had a positive impact on the researches of doctoral students at universities, and several PhD dissertations were soon written on the issue of urban tourism (Márta Bakucz, Tünde Juray, Katalin Lőrincz).

The weakest point of the researches on urban tourism is just the access to the main characters, the tourists, because they are hard to distinguish from other stakeholders using the city, also, due to their specific touristic behaviour they are in a hurry and do not have time to give long answers during questionnaire survey sessions. Of course the problem can be easily overcome with some tricks, but the essence of researches aiming at the in-depth analysis of this tourism product, the exploration of the characteristics of its operation and the recognition of its specific development needs would just be to carry out surveys examining all stakeholders of urban tourism. An extremely complex product can only be learnt by extremely thorough analyses.
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3. fejezet - Géza Szabó: Products and product specialisations in rural tourism

Introduction

Rural tourism as a tourism product in Hungary is part of heritage tourism, on the one hand, and also has a strong relationship to agricultural sector as an effective tool of rural development, on the other hand. Inspired by the success of the period between the two World Wars, rural tourism reviving in the years around the systemic change has become by now the most extended tourism product. In each county of Hungary, in the villages of their most beautiful areas we find successful rural tourism hosts. The range of visitors that has expanded and considerably transformed since the systemic change now mostly involves domestic guests. The amendments of the regulations concerning this activity in the recent years, the elimination of the tax allowances have had negative impact on rural tourism. The significant decline registered is due, in addition to the inconsiderate legal changes, to the general decrease of domestic demand.

In addition, rural tourism can also maintain and utilise, in cooperation with several other activities that can be pursued in rural areas, the traditions, natural beauties, gastronomic and material culture and the intellectual heritage of the rural areas. The role of rural tourism should not be underrated in the maintenance and promotion of the countryside, the so much awaited strengthening of the rural local economy.

This learn material looks at the information on rural tourism, from the content of this activity through its positions and territorial picture to development possibilities, innovative solutions and support programmes. It also makes recommendations for further readings in professional literature.

1. Concept, legislation background and institutional system of rural tourism

1.1. Rural tourism – village tourism interpretations

Already before World War II, organised rural tourism operated in Hungary. Holidaymaking with full board was possible in several villages. The National Hungarian Weekend Association was established in 1929 (and it was reorganised in 1932). The national catalogue of summer rural tourism opportunities called the “Utas Könyve” (Book of the Traveller) was published, including the organised offer of 127 villages. In 1936 the National Hungarian Tourism Society (Országos Magyar Vendégforgalmi Szövetség, OMVESZ) was founded, as an organisation operating 29 county directorates.

After World War II, the system or rural tourism that had been systematically built out since the 1930s was liquidated. The organisation operating before the War had assisted rural tourism by the increase and promotion of the demand, by a professional propaganda and promotion of accommodations. The establishment of accommodations was achieved by the integration of villages into the system, the preparation of the hosts and making them interested in the development of their own settlements.

Rural tourism – village tourism

There was a change of scenario in the development of tourism in Hungary in the 1970s, the most important consequences of which can be measured in efforts made to make tourism territorially more balanced in the country by the exploration of new destinations and the creation of new attractions. Rural areas practically untouched by tourism before now were in the focus of attention. In these regions the interests of tourism and of spatial development in the broad sense of the word can be integrated. Their joint product is the kind of tourism called “Landtourismus” (“rural tourism”) in German speaking areas. This is a collective notion that includes, on the one hand, all those methods by which tourism can be relocated into rural areas outside touristic centres and zones that have spontaneously developed; on the other hand, it integrates those tourism activities that are capable of the utilisation of the explored endowments. In Hungary the equivalent of this concept is ‘village tourism’, but the use of the specification rural tourism that provides a broader approach would be reasonable.
From tourism product development and rural development aspects, rural tourism means unique services typical of the respective receiving farms. Its characteristic features are as follows:

- they are built on local and micro-regional attractions;
- in most cases the hosts and the guests live in the same house, the same farm;
- guests can become participants in the homely, friendly way of living following local traditions, and in events;
- this activity can be pursued both without licences, in non-business form or as a business with licences, as a full-time living;
- rural tourism increases job opportunities, improves the living of the local inhabitant as a supplementary source of income;
- it creates demand for local services, products, the natural and cultural values;
- it mediates culture between hosts and guests;
- it contributes to strengthening cooperation and joint identity of inhabitants of the region;
- it may contribute to the creation of the complex system of tourism services in the settlement or region;
- it is sustainable and not mass tourism;
- it usually recycles the incomes generated;
- rural tourism is utilisation of the complex tourism supply of the villages;
- rural tourism offers at the same time village living conditions, local habits, culture and agriculture – where there is agriculture.

Interpretation of rural tourism from legal regulations:

Looking form the side of development, rural tourism means all hosting activities pursued in non-selected medical or holiday resorts, provided that the location and the character of the activity meets the following criteria:

- Existence of a harmonic natural and built environment, taking the needs of the local inhabitants and the guests into consideration.
- Preservation or creation of the special supply and image built on the landscape and the specific local features in each settlement, micro-region and ethnographic region. Creation of product packages on the basis of a list attractions, in community cooperation.
- Hosts and other service providers of the village or micro-region cooperate in an organised form (association etc.), and a marketing organisation will help them accede the market.
- The local municipal governments or the association of the municipal governments participate as active supporters in the development of rural tourism.
- Village host participating in rural tourism accept participating in trainings and further trainings, and also the qualification of their homes in accordance with a jointly defined and approved system of quality criteria.

According to the Government Decree No. 239/2009 (20 October) in effect for rural tourism, rural accommodations are accommodations outside the Selected Holiday Region of the Lake Balaton and medical resorts, located in settlements with less than 5000 inhabitants and in areas with a population density below 100 persons/km², provided that they were created in order to demonstrate village living conditions, local rural traditions and culture, with auxiliary services, if necessary.

Of course accommodation is only one part of rural tourism, but a dominant part, also coming from the legal regulations.
The concept of ‘village tourism’ well-known in Hungary does not clearly define any type of tourism product. Its specific feature is more in its complexity, its character integrating other tourism products. Rural tourism, in addition to the reception of guests at village accommodations (i.e. accommodations established in the place where the host lives), may involve

- cultural supply (local traditions, holidays, events and folklore),
- gastronomy (hosts treat their guests to their own meals, home made wine, brandy, or fruit juice etc., creating a connection to agrotourism),
- wine tourism (hosts offer their own wines in their on cellars),
- hiking in nature (with visits to nature protection protected),
- medical tourism (using the nearby medical spas, or the special local climate),
- equestrian tourism (integrating the local horse riding facilities in the supply),
- camps for children.

The definition based on the elements of supply can be made more exact by the definition of the concept itself: „satisfaction of the wide range of demand of domestic and foreign guests for leisure services in extra-urban, well-kept village or rural environment with local and regional attractions, on business ground, and in the cooperation of local institutions and service providers organising the activity” (Jenkei L. 2002).

Within rural tourism, village tourism is tourism in areas

- where attractions are scattered and not strong enough in themselves;
- where progress depends upon the self-organisation and joint efforts of the local community;
- and where tourism development and rural development, as a special applied form of spatial development go hand in hand, mutually reinforcing each other to bring results.

The concept used by the Association of Hungarian Rural and Agrotourism (Falusi és Agroturizmus Országos Szövetsége, FATOSZ) is as follows:

Satisfaction of the wide range of demand of domestic and foreign guests for leisure services in extra-urban, well-kept village or rural environment with local and regional attractions, on business ground, and in the cooperation of local institutions and service providers organising the activity. It is a way of passing leisure time that is built exclusively on the consumption and utilisation of village tourism goods.

1.2. The organisational system of village tourism

The new area of village tourism starting from the late 1980s has individual characteristics and important experiences.

- The revival of traditions is supplemented by significant community cooperation and the birth of nongovernmental organisations and local associations that have been given support from the municipalities and the micro-regions. Such micro-region and local associations active in rural tourism have been created and function excellently in the regions and counties. We can say that the success of rural tourism also proves the successful operation of these organisations.

- In order to support hosts and represent their interests, in 1990s a national body was founded with a county level organisational structure established later. In the initiation of the national body, Baranya county had a pioneer role, as it was the seat of Baranya county, Pécs where in 1992 the organisation called “Association for village tourism” was founded for the support of the community development of rural tourism. The Association had members from each major rural tourism area of Hungary. The interest representation activity was handed over in 1994 to the Association of Hungarian Rural Tourism then founded on the initiative of 32 organisations, now operating as a professional interest representation body called Association of Hungarian Rural and Agrotourism (FATOSZ).
- FATOSZ operates as an umbrella organisation, with 19 county associations as members in it. It operates a national centre and a Tourinform office and is responsible for interest representation of rural tourism at the national level. County organisations have as members, in addition to private hosts, entrepreneurs and businesses and also municipal governments interested in rural tourism, as well as local and regional rural tourism organisations.

- For the qualification and quality assurance of rural tourism, with the support of the national tourism administration (Hungarian National Tourism Board) FATOSZ worked out by 1997 the system of criteria relevant for the qualification of the accommodations. These criteria were included in the Government Decree No. 110/1997 (later replaced by the already mentioned Government Decree No. 239/2009).

- For the implementation of qualifications and professional consulting, FATOSZ trained and created, with the assistance of the ministry for agriculture, its own network of experts. The network of trained and qualified rural tourism consultants has more than 60 members by now.

- The effective marketing activities of rural tourism were also born by the end of the 1990s. County, regional and national catalogues are regularly published. FATOSZ and its member organisations in the counties are regular exhibitors at national and regional tourism fairs. The rural tourism organisations have made sure that their members are featured on the large internet-based accommodation registers and they also have their own websites connected to the central site of FATOSZ.

2. Attractions and supply of rural tourism

2.1. Attractions in rural tourism

An important characteristic of rural tourism is that its attractions can be categorised into three major groups:

*Proximity of nature, naturalness.* Villages and village people are actually mediators between urbanised city population – remote from nature – and rural areas that more or less still preserve their naturalness. The proximity of nature is an attraction for rural tourism, hiking, cycling or ecotourism activities.

*Preserved traditions.* Villages – partly coming from their belated development – have preserved a lot from the material and intellectual culture formerly typical of the Hungarian countryside. This can be seen in the village monument buildings, on the one hand, and in the material remains of the traditional way of farming and also in the traditional handicraft or agricultural products, on the other hand. This category also involves the (visual) attraction and folk costumes, folk traditions and traditional holidays.

*Village hospitality, family-like atmosphere as an attraction is of outstanding significance.* Hospitality in villages is more advanced in this respect than any other tourism supply. The kindness of the host, the warm reception of the guests, family atmosphere is the strength of rural tourism that is most acknowledged by the guests.

2.2. Qualification system

Accommodations of rural tourism gained their qualification in the qualification system worked out by the national interest representation body, the FATOSZ in 1997, acknowledged in the special legal regulation concerning the activity (Government Decree No. 110/1997). The “sunflower” qualification system lives on as a National Qualification Trademark since 2011, in accordance with the Government Decree No. 239/2009 on the commercial and private accommodations. The qualification system awards 1 to 4 sunflowers to the village accommodations, depending on the comfort level and the equipment of the accommodation.

A four-sunflower accommodation has a separate apartment with a bathroom and a toilet, with a well-equipped room, dining room, living room; also, in this accommodation a kitchen and a garden with furniture are at the disposal of the guests who also have car parking facility. These can be called as village accommodations with full amenities.

Accommodations with three-sunflower qualification are village homes that have a bathroom and a toilet separate for the guests, who have access to a dining room, a kitchen and a garden and car parking facility.

Two sunflowers are the marking for lower quality accommodations where the bathroom, toilet, dining room and kitchen are used jointly with the hosts’ family. Car parking facility is provided even in this case.
Simply equipped accommodations without amenities, basic camping facilities for tents, with car parking facility are locations marked with one sunflower.

3. The characteristics of demand in rural tourism

3.1. The situation of rural tourism

The definition of the place and role of village tourism and agrotourism within rural tourism can happen by using national capacity and turnover figures and by the evaluation of territorial dimensions. The databases of the assessment are partly from the data registered by the Hungarian Central Statistical Office (HCSO), as a supplement, the qualification database of the Central Office of the FATOSZ was used.

The overall situation of village tourism in Hungary

The Government Decree No. 110/1997 on private accommodations defined the system of the registration, and the collection of capacity and turnover figures of village hosts. This was partly amended by the above-mentioned Government Decree No. 239/2009, where village accommodations were listed among the ‘other accommodations’. With the assistance of the notaries, the Hungarian Central Statistical Office summaries the annual data of rural tourism, creating thereby the basis for comprehensive analyses.

Data on the number and accommodation capacity of registered village hosts have been available since 1998. The number and capacity of accommodations and beds continuously and significantly increased between 1998 and 2009, the number of registered hosts in the whole of Hungary grew from 4,893 to 7,534 (Figure 1, Table 1). This expansion was accompanied by the growth in the capacity as well. In 2009 a total of 49,327 beds were registered in Hungary.

Figure 1

![Graph showing the number of village accommodations and beds from 1998 to 2010.](image)

Source: HCSO

Rural tourism accommodations in larger numbers can be found in North Hungary, West Transdanubia and South Transdanubia in the first place, these regions concentrate almost 60% of all capacities. The biggest number of village hosts and accommodations – 39% of hosts and 41% of accommodation, respectively – were registered in North Hungary. The number of village accommodations was the lowest in Central Hungary, with only 2% of all such accommodations in the country (Figure 2).

Table 1

Capacity of village accommodations within ‘other’ (until 2009: private) accommodations, in 2009 and on 31 December 2010

<table>
<thead>
<tr>
<th>Type of accommodation</th>
<th>Number of hosts</th>
<th>Number of rooms</th>
<th>Number of beds</th>
<th>Number of beds incl. extra beds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Village accommodations</td>
<td>7,385</td>
<td>19,906</td>
<td>48,585</td>
<td>49,862</td>
</tr>
</tbody>
</table>
As a consequence of the introduction of volume limit for village accommodations (see Government Decree No. 209/2009), the capacity of village accommodations was almost halved (Table 1). The intensity of decrease, however, varied across the regions. In Central Hungary and Middle Transdanubia the number of settlements falling out of the circle of rural tourism for administrative reasons after the “limits” introduced is smaller, while in North Hungary and in the Great Hungarian Plain the difference is considerable. This also means that, besides a decreased capacity and number of guests, the positions of Central Hungary and Middle Transdanubia in rural tourism decreased by 2010 in the new composition. The volume limit set in the legal regulation (239/2009) meant that in 2010 beds in settlements with over 5,000 population, including Great Plain towns with scattered farms on their outskirts, or rural parts of Transdanubian small towns, were no longer registered as village accommodations. Due too this volume limit village tourism can only be registered in settlements below a population density of 100 persons /km². These administrative rules worsened the positions of rural tourism.

Figure 2: Breakdown of the beds of village accommodations by settlements, 31 December 2010

Source: HCSO

Looking at the performance of rural tourism in 2010, the number of foreign guests fell by more than half in village tourism that represented 14% of all ‘other’ accommodations (Figure 3), parallel to the decline in the number of domestic guests (by 45%). The altogether 126 thousand guests spent a total of 371 thousand guest nights at village accommodations, and almost 92% of them were domestic guests. The largest number of guests was registered in North Hungary (50 thousand guests), while the least popular rural tourism destination was Central Hungary (with 3 thousand guests). The number of guest nights followed the decrease of the number of guests, the fall was almost 50%. The number of foreign guest nights decreased by 63%, the number of domestic guest nights fell by 47% from the previous year, which meant a total decrease of 49% in the number of total guest nights.
The majority of guests in rural tourism since the late 1990s are definitely Hungarians (Figure 3). The proportions of foreign and domestic guests were almost equal around the millennium, since 2011 a significant rearrangement has taken place. In 2008, the best year of rural tourism so far (744,243 guest nights), the number of guest nights by domestic guests was approximately six times higher than the number of nights spent by their foreign counterparts.

Among the Selected Holiday Regions of Hungary it is the Mátra-Bükk Selected Holiday Region where hosts have the largest capacity of rural accommodations. The total of 3.6 thousand beds were occupied by 20% of all guests, one thousand foreign and 25 thousand domestic guests in the year in question (Figure 4). Besides the Mátra-Bükk Holiday Region, larger numbers of Hungarian guests arrived at the Tisza Lake Holiday Region and the Mecsek-Villány Holiday Region, which was also shown in the number of guest nights (21 thousand guest nights and 20 thousand guest nights, respectively).

Parallel to the decrease of the registered capacity of rural accommodations, the share of domestic guests went on increasing (Table 2). The figures of 2010 demonstrate that rural tourism is pursued in more than 90% by domestic guests in Hungary. The indices generated from the number of guests and guest nights have not changed significantly in the last two years. The decreasing number of foreign guests spent a lower number of nights in rural tourism on the average, unfortunately.

**Table 2**

<table>
<thead>
<tr>
<th>Specification</th>
<th>Total of guest nights, thousand</th>
<th>Share of domestic guest nights, %</th>
<th>Average duration of stay, nights</th>
<th>Number of ... per one host</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>guests</td>
</tr>
<tr>
<td>Village accommodations</td>
<td>721</td>
<td>88,5</td>
<td>3,7</td>
<td>32,0</td>
</tr>
<tr>
<td>2009</td>
<td></td>
<td></td>
<td>3,0</td>
<td></td>
</tr>
<tr>
<td>Village accommodations</td>
<td>371</td>
<td>91,6</td>
<td>3,0</td>
<td>33,9</td>
</tr>
<tr>
<td>2010</td>
<td></td>
<td></td>
<td>3,0</td>
<td></td>
</tr>
</tbody>
</table>

Source: HCSO

**Figure 4. Breakdown of the guest nights in village accommodations by holiday regions, 2010**
In 2010, the most popular among the planning and statistical regions were North Hungary and West Transdanubia: almost two-thirds of all guests (77 thousand of them) spent in these regions 58% of all guest nights. The number of guests was the lowest in Central Hungary (3 thousand). The largest number of guest nights was registered in North Hungary, where 37% of all guest nights was realised. Within this, the number of domestic guest nights (127 thousand) was way above the number of guest nights spent by foreigners (9 thousand). The least popular rural tourism destinations for domestic guests were the South Great Plain and Central Hungary.

There are two groups of counties with considerable capacities and also significant number of guests and guest nights in Hungary:

- In Transdanubia they make a stripe from Veszprém and Győr-Moson-Sopron counties, including Somogy, Vas and Zala, right down to Baranya in the south.
- The other “junction” involves Jász-Nagykun-Szolnok county, Pest county and also the two busiest rural touristic counties of Hungary, i.e. Heves and Borsod-Abaúj-Zemplén.

The group of counties with the most modest capacities and demand are as follows:

- A wide stripe in Transdanubia, made by counties from Komárom-Esztergom to Fejér and Tolna counties.
- The stripe continues in the Great Hungarian Plain: Bács-Kiskun, then Csongrád and Békés, Hajdú-Bihar and Szabolcs-Szatmár-Bereg counties make the less popular counties of rural tourism in Hungary.

**4. Trends in village tourism**

The demand trends of rural tourism, including village tourism are connected to the major motivational processes of tourism. The desires and expectations of the guests visiting villages are centres around major junctions.

**4.1. Assessment of the demand trends of tourism for the products of rural tourism**

- *Tourists show a growing interest in almost unspoilt natural landscapes, clean and beautiful nature.* Protected areas are appreciated, the motivations of tourists shift from pleasure-centric attitude towards the acquisition of experiences and new knowledge. Tourism products introducing protected values and offering unique experiences, located in authentic, traditionalist and clean regions free from environmental degradation.
and from mass use by tourists can expect a growing demand. Hiking, ecotourism featuring the landscape and rural tourism organised into tranquil, quasi natural villages also have improved chances.

- **The desire for complete silence and tranquility, for “perfect” recreation** may bring about the appreciation of “untouched” rural areas as tourism destinations, too. Quiet lake shores and river banks, settlements remote from busy places but ready for the reception of guests will also have improved positions.

- **Individualisation, the appearance of individual demands and desires of the guests.** The popularity of organised group travels is decreasing, those are now the majority who travel on their own or in small groups with their friends and families. Guests want a lot of offers to choose from, the want to try diverse products. The chances of places with unique image – smaller, friendlier boarding houses – and of destinations suitable for the satisfaction of hobby needs – e.g. nature watch, bird photography – are improving. Similarly, the demand for theme products, products of definite units of offers is increasing. Satisfaction of the hobby needs and the individual requests will become a major demand trend.

- **Strengthening of the quality aspects in the supplies.** The positions of hosts who are unique and special but also able to meet high quality demands will improve. The days of mediocre mass services are over.

- **Increased quality expectations against the holiday resorts.** Holidaymakers have higher and higher quality demands against the destination of their holidays. They expect tidy, well-kept and comfortable accommodations and an environment in the destination that offer at least the level of their own homes. This is a great challenge for hosts in the villages. A clear-cut demand is, in addition to the comfortable accommodation, the intimate and family-like atmosphere and the civilised and tidy environment.

## 5. Village tourism in development policies

The development perspectives of village tourism are determined to a large extent by economic development, territorial development and rural development programmes. In this chapter we give a brief summary of these development systems.

### 5.1. Village tourism in the Hungarian National Tourism Development Strategy (NTDS 2005-2013)

Although rural (or village) tourism has appeared in the Hungarian tourism development programmes and its dimensions have been defined, its position is far from being satisfactory. The Hungarian National Tourism Development Strategy features rural tourism among the products of national importance, within heritage tourism that is second in the order of the priorities. This category also contains other rural tourism products such as wine and gastronomy, equestrian tourism, in addition to village tourism that is considered as a user of the Hungarian rural heritage. The Strategy mentioned the complex character and its many connections to other products. Nevertheless village tourism, despite all positive approaches to it, is not eligible for support from tenders financed from Regional Operational Programmes (ROP-s), the most important resource of the NTDS from the EU. Some related activities such as wine tourism or rural festivals could apply for development resources on their own or jointly with other products. A basic rule of ROP financed tenders is that support is only given to major projects worth over HUF 10 million, with the goal of significant impacts to be achieved. The main beneficiaries of the EU resources for economic development are businesses, while village hosts, who are private persons in the majority of the cases, were not eligible for such supports.

There is one activity within village tourism that is eligible for support from the ROP-s: tenders were announced for the assistance of tourism management activities. There are tenders for the initiation of local and regional TDM (tourism destination management) organisations, where the village hosts could also enjoy the benefits of marketing and destination development as members of the TDM organisations. Even more indirect tenders are the ROP tenders written for the foundation of tourism clusters. In South Transdanubia this was the basis on which a regional cluster of village tourism was made in 2010.

### 5.2. Rural development programmes

For the development of village tourism and other forms of rural tourism, resources available for private persons including village hosts are supports from the European Agricultural Fund for Rural Development (EAFRD). Axis III in the EAFRD contains assistance for the promotion of tourism activities. These supports are available for
the establishment of village accommodation and related services, and
- the enlargement, modernisation and product development of existing village accommodations and for the provision of physical access to them.

In addition, support can be required by tendering for non-accommodation related agrotouristic activities. In this case agrotourism is interpreted as village tourism related to agricultural land or agricultural activity. The following activities under the heading agrotouristic services are supported:

- demonstration of local or own folk arts, ethnographic, handicrafts, architectural and cultural values, heritage and products;
- demonstration of traditions and activities connected to village life, environment and work culture;
- demonstration of activities related to home-made foods and gastronomic traditions in village, rural or farm environment, and the offer of the foods produced for consumption on the spot or for sales for tourists on the farm;
- demonstration of local farming methods and production habits.

Further non-accommodation related services connected to village tourism can also be supported. These include the development of infrastructure and tools of

- equestrian tourism services,
- hunting tourism,
- forest tourism,
- angling tourism,
- water tourism,
- wine tourism.

On the chances of getting resources from the EU and the Hungarian funds in the coming, 2014-2020 planning period, information is provided by the strategic parts of the document called “National Rural Development Strategy 2020” and the national strategic programmes constituting these parts. Village tourism is featured as “The programme for catering guests in villages and scattered farms” in the strategic field called “Local economic development”. The programme for catering guests in villages and scattered farms aims at the development of the countryside and village by the creation of the reception capacity of tourism. For product development, the strategy finds it important to establish and operate a tourism management of research, statistics, and the better local and micro-regional (TDM, LEADER) utilisation of the resources. Other objectives are the enlargement and modernisation of the information system and marketing tools of village tourism, including online solutions, and the creation of the multilingual joint website of organisations operating in the Carpathian Basin, engaged with (the promotion of) village tourism. Also, the creation and development of services offering unique local, micro-regional and regional experiences and the creation of product packages are seen as tasks of selected importance. The strategy also wishes to develop village catering and catering provided by small-scale producers as an effective tool of the sales of local products.

The professional trainings, consultancy and qualifications for the support of village and farm tourism should also be strengthened, and the specialisation of village accommodation providers is promoted (e.g. bio-accommodation, heritage accommodation, eco-accommodation etc.).

Tenderable resources are devoted to the expansion of the services offered by village accommodations, with the development of the quality and the increase of the capacity in the focus of this. The strategy also wants to support the cooperation and integration of ecotourism activities pursued in protected natural areas with village tourism.

6. Product specialisations in Hungary and abroad, synergies, cooperation with other products
In the market of village tourism too the development of specialised products, meeting the demands of the guests as much as possible, has started. Following the foreign examples of rural tourism, product specialisations by the integration of rural tourism with several other products have been made. Some of these products are already available; they have been developed on the ground of clear-cut criteria. Others are still in the phase of preparation or planning, or the set of criteria are being defined.

6.1. Special products of village tourism and agrotourism in Hungary

Specialisation – by the qualification criteria of guest houses (accommodations) – is a further step for the differentiation of the large and incomprehensible supply of village holidays (rural tourism) in Hungary, and also a measure increasing the safety of products for the guests.

The expectations against special offers are adjusted, in the spirit of a marketing-oriented strategy, to the exact desires and demands of the guests. For the village (rural) hosts and commercial accommodation owners in a specialised area to become and remain competitive, special criteria have to be met (in addition to the general quality requirements), which have to be regularly adjusted to the new needs every now and then.

The world has already gone further than this. In the rural areas of the European countries with advanced tourism, qualified accommodations have moved further towards programming and now have unique, special offers. The time has come in Hungary too to make this step! The differentiated market demands urge us to do so. The demands of the guests participating in village tourism have become more and more exact. Guests seek, in accordance with their motivations, the holiday locations most suitable for them. As the demands of the guests can be learnt, the answer is given: services also have to become more exact along the expectations of the customers.

An important lesson of the touristic trends of the recent years is that the range of guests is more and more segmented. Those who have different interests and prefer different holiday activities try to fully meet their expectations when choosing the holiday destination and assess the available services. They prefer locations that are the most suitable for their motivations.

Another factor promoting specialisation is the more and more differentiated nature of communication. In tourism today the attraction may be grabbed by novelties and well segmented products. Potential holidaymakers in the dump of information try to find strong points among the almost infinite number of offers, and they have key word for this. In this information process, specialised products have more chance to get to the seekers of information.

Experience-orientation, which is a dominant element in tourism, requires continuous product development that can renew the traditional offer of village tourism by the means of product specialisations.

We should listen closely to the opinion of Hans Embacher (2004) on the advantages of making specialised products from the side of the service providers:

- more professional product development;
- more effective training and education;
- exchange of experience / chance to learn from the best examples;
- economies of scale (e.g. procurement);
- concentration on advantages in marketing;
- more competitive product range;
- more innovation opportunities in the special areas;
- expansion and renewal of the content of cooperation with professional tourism organisations.

In Austria, a country that has always been an example to follow for Hungary in village tourism, the system of specialised products was created by the late 1990s, already. The seven main products are as follows:
1. Families with small children
2. Disabled persons
3. Events
4. Handicrafts programmes
5. Wine tourism
6. Bio-farms, health tourism
7. Horse riding

In Hungary there are eleven areas where the widening and deepening of the supply is recommended, for which FATOSZ, in cooperation with the experts of the national associations of the respective areas, has started to work out catalogues of exact criteria. Special care must be taken to have full and harmonised supply in the accommodations (farms).

The system of rural attractions, the special products of village tourism and the related rural tourism products

<table>
<thead>
<tr>
<th>Attractions</th>
<th>Special products of village tourism</th>
<th>Related rural tourism product</th>
</tr>
</thead>
<tbody>
<tr>
<td>I Natural values of rural areas</td>
<td>- Active holiday in villages (cycling, angling, hunting, hiking in nature, walking tours) - Holiday on an equestrian farm - Environment friendly (eco) accommodation (local products, natural values)</td>
<td>- Hiking in nature - Cycling tourism - Angling and hunting - Equestrian tourism - Agrotourism - Ecotourism</td>
</tr>
<tr>
<td>II Material and cultural heritage of the countryside</td>
<td>- Accommodation of traditions - Accommodation for groups in a village house - Village lifestyle accommodation for the youth (involvement of the target group in agricultural works) - Children-friendly accommodation</td>
<td>- Cultural tourism - Youth tourism - Agrotourism</td>
</tr>
<tr>
<td>III Values and products of agriculture</td>
<td>- Health conscious accommodation (herbs, bio-products, reform lifestyle, healthy local foods) - The “village table” (gastronomic experiences, local products) - Holiday at a winemaker (village tourism in the supply of wine routes)</td>
<td>- Health tourism - Agrotourism - Agrotourism, wine tourism and theme routes built on local products</td>
</tr>
<tr>
<td>IV Special offers</td>
<td>- Holidays for disabled persons in village houses (can be combined with offers of traditionalist, health conscious and “village table” accommodations, equestrian farms and winemakers)</td>
<td>- Health tourism - Agrotourism - Equestrian tourism - Cultural tourism - Ecotourism</td>
</tr>
</tbody>
</table>

7. The practice of product development: eco-accommodations and clusters

Fortunately not only foreign but also Hungarian examples can be seen now for the development of village tourism and the related rural tourism products. Of the specialised products introduced in Chapter 6, in South Transdanubia in the autumn of 2010 the eco-accommodation system called “Network of Environment Friendly Accommodations” was inaugurated, with the assistance of the Norwegian Civil Fund.
Also in South Transdanubia, in January 2011, the “South Transdanubian Rural Tourism Cluster” was launched, having gained a ROP support. Both projects carry experiences to be utilised elsewhere for the organisers and developers of rural tourism.

7.1. Eco-accommodations

Environment friendly accommodations, “eco-accommodations” in South Transdanubia

A trend palpable in the recent years is that the interests of guests visiting South Transdanubia is turning towards natural specialities and the beauties of the landscape. This fits into the dominant international demand trends of travels interested in nature, collecting experience and knowledge and showing respect for nature, and of ecotourism. Such travellers would like, in addition to having nature experiences, to do something for the preservation of the values and the protection of the environment. Instead of usual urban commercial accommodations they seek accommodations in the vicinity of protected areas, accommodations that are energy and water saving, dedicated to the recycling of wastes and capable of the demonstration of local, village and rural traditions, authentic and preserve traditional production methods. Such accommodations are operated by local hosts, and in catering they rely on the local tastes and products. In addition, they are cordial hosts who know the natural values of the neighbourhood and are able to present them to the guests.

In South Transdanubia a network of accommodations satisfying such demands started to operate in the autumn of 2010. The village hosts of this network receive their guests in a new qualification system, as “Environment friendly accommodations” or “Eco-accommodations”. In the first round 32 hosts were qualified with this new label, who started their operation in villages around the most valuable nature protection areas.

Figure 5. Spatial distribution of the South Transdanubian eco-accommodations (Ed. Pirkhoffer, E. 2011)

The spatial distribution of the South Transdanubian eco-accommodations follows the location of protected areas (Figure 5). Besides the protected values of the Danube-Dráva National Park, from Dunaszekcső to Erdőfü and from Sellye to Drávasztára, well-equipped and environment friendly accommodations can be found in nine settlements.

Among the villages surrounding the East Mecsekk Landscape Protection Area, five villages from Mecseknádasd via Hosszúhetény to Vékény, among the villages at the foot of the Jakab Hill in the West Mecsek Landscape
Protection Area, Cserkút and Kővágószőlős have qualified accommodations at the disposal of guests dedicated for the protection of nature.

In eight villages of the Zselic Landscape Protection area linking Somogy County to Baranya, from Gyűrűfű via Kán to Szenna and Bárdudvarnok we find a dozen of accommodations qualified as “Environment friendly accommodations” for the reception of ecotourists and the lovers of nature.

The eco-accommodations of the region may receive their distinctive label if they meet the criteria of the qualification system worked out for the private accommodations, including village accommodations.

The eco-accommodation qualification system

The European Union defined with its EC Committee Decision No. 2003/287 the qualification criteria relevant for commercial accommodations and camping sites. Meeting these, applicant accommodations can receive an “eco-label” qualification. The system, which was worked out for commercial accommodations only, defines in five areas the expectations of environment friendly construction and operation. These five areas include energy saving and water saving, careful operation and the minimisation of the amount of waste. In addition, it involves the information of the guests.

Following the EU regulations, Hungary also worked out the criteria necessary for the award of “Environment friendly product” label, also relevant for the commercial accommodations. The main issues of this system are identical with the EU regulation. For the private accommodations typical in rural tourism, including the village accommodations, no national system allowing an “eco” qualification has been worked out yet. For the sample area of South Transdanubia, with the assistance of the macro-project of the Norwegian Civil Fund, the Baranya County Rural Tourism Association worked out the qualification and criteria system of the network called “Environment friendly accommodations”, the system of “eco-accommodations”, using and assessing the experiences of the international systems mentioned above. On the basis of the system, the qualification of the eco-accommodations was done.

The qualification system has a development character; it prefers developments marked by market trends that may lead to the establishment of special quality, thereby unique and popular services for which the demand will be there for a long time.

The eco-accommodation qualification system has three levels. The first level contains the basic criteria. These are the entry to the programme, by meeting these criteria service providers can apply for support for developments necessary to obtain the environment friendly accommodation label. The criteria at the second level of the qualification clearly define the directions of the service development by the host. At the third level extra achievements are evaluated by the system, the implementation of which will lead to the birth of services of special attraction. These cannot be expected of all service providers longing for the environment friendly accommodation label, but their presence reinforces the quality of the ecotourism supply of the region.

The qualification system looks at six aspects of evaluation: 1. environment; 2. the accommodation and its amenities; 3. information and preparation; 4. local products and handicrafts products; 5. programmes, activities; 6. partnership.

On the basis of these, an eco-accommodation is as follows:

– A village accommodation that is comfortable and has all amenities, as an accommodation it is in the 3 or 4 sunflower quality category.

– The accommodation is situated in the vicinity of values of nature protection and the host is prepared for the presentation of the sights of interest in the neighbourhood.

– The accommodation with its environment is environment friendly and traditionalist, energy and water saving, selectively collecting its waste and composting the organic part thereof.

– Hosts insist on cultural traditions, they keep the old local traditions of production.

– They have local foods and/or handicraft products that they happily present to the guests; they offer tastings of local specialities.

– Hosts know the hiking trails and cultural programmes of the area and offer these to the guests.
7.2. Clusters

7.2.1. Clusters and touristic clusters

The Hungarian interpretation of clusters that cover the territorial, usually regional level cooperations of the economic actors is closely linked to Porter’s (2000) definition, which, without differentiating among the sectors of the economy, contains the following basic characteristics (Grosz A. 2006):

- Clusters are strategic business alliances built on geographical proximity.
- A motivation of their creation, the common interest is the joint action against the external competition.
- The internal system of relations in the clusters is characterised both by the harmonisation of local interests and the exploration of synergies in cooperation, but there is also competitive attitude among partners in the relationship.
- The relationships among the inner partners are stabilised by the mutual trust, which may be strengthened by informal relations among members.

Selected activities of clusters include

- joint innovation activity;
- training preparing actors to meet market demands;
- promotion of the internal information flow and cooperation.

Thematic and network cooperation are present in tourism, where the above-mentioned features and advantages are similar. Cooperation is enlarged in this special sector inasmuch as innovation is mostly manifested in the development of products belonging to special product types. Functions of selected importance are joint image building and marketing. Similarly to industrial clusters, the main objective and expected achievement is to improve the competitiveness of the businesses and service providers in the given area, region.

Hungarian development policy, recognising the role of clusters in the increase of territorial competitiveness, has announced several tenders for the support of cluster building (and later, operation). The majority of the Hungarian cluster cooperations are in industry, but tourism clusters, in fact, culturally oriented clusters have also been established. The support available in the tendering process is usually for the promotion of cluster organisation and management activities.

Touristic cluster development in South Transdanubia

The South Transdanubian region in 2010 extended its tenderable supports available for tourism management activities to touristic clusters (DDOP-2010-2.1.3 A). The defined objectives of cluster development were the creation of networking in the sector, the improvement of the information flow among the partners and the offer of competitive tourism services. Supports are available for the promotion of product-based touristic cooperations. Special attention should be paid to the definition of the call for tenders, i.e. that clusters are different from TDM organisations, as the basis of the organisation activity is not the destination but the identical field of operation.

The South Transdanubian region, taking the regional characteristics into consideration, supported the following cluster themes:

- Medical and health tourism
- Equestrian tourism
- Wine tourism
- Ecotourism
- Rural tourism
- Heritage-based cultural tourism
- Events and festival tourism
- Castle and chateau tourism

The majority of the above-listed product types had already appeared in the cluster tenders based on previous Earmarked Tourism Provisions of other regions or in other EU resources. The real novelty of the call for tenders was the inclusion of rural tourism into the list of products available for support. It is not to say that this product did not deserve this attention on the basis of its previous achievements; it is because most rural tourism service providers are private persons and non-governmental organisations accumulating them. Entrepreneurs or larger businesses can rarely be found among the service providers. The calls for tenders consistently prefers cluster developments implemented by the cooperation of companies and enterprises, this can also be seen in the criteria and indicators. It is a great challenge for the developers of rural tourism then how a regional rural tourism development cluster can be created and operated.

7.2.2. Development directions in rural tourism in South Transdanubia: cluster development

The basics common interests of the participants in the cluster is the sustaining of rural values, be they preserved cultural traditions, the traditions of local production or the rural tourism built on these, and the utilisation of these values, promoting the better living of people dealing with them. In order to achieve this, formerly individually acting stakeholders should cooperate for the creation of a development system and also to make their own operation more effective. A foundation of common interests is the development of rural tourism, the improvement of its market positions, and the continuous raising of the quality level of services available for guests. For this purpose, the entrepreneurs satisfying the demands of guests and the organisations made by hosts should be integrated into a cooperation organisation. Joint efforts led to improved services and a developing environment for hosts, and a coordinated demand for businesses joining the cluster with their business, educational or development services. It is very important that the demands for accommodation and catering services should be met by the supply of the supporting businesses; it is a dynamising element in the development of the cluster. A common interest and opportunity at least this important is the development of the relations of different business service providers within the cluster. On the very first talks of the organisation of the cluster it turned out that businesses engaged with e.g. marketing, communication, education, the sales of local products or event organisation can effectively promote each other’s activities. The interests articulated in the clusters will reach the village service providers through the interest representation organs participating in the clusters, and they will also bring together businesses active in different sectors but interested in the development of the activity of the cluster.

The content of innovation in the development can be seen in three elements:

1. product specialisations, the system of product brands, new products on the market with new marketing solutions;

2. establishment and development of local product brands (agriculture, handicrafts, services), together with its methodological background;

3. building out and operation of a market-oriented system offering new knowledge and quality services for the development of rural – village – tourism in the region.
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4. fejezet - Szilvia Boros - Erzsébet Printz-Markó: Health tourism

Health tourism is one of the fastest developing branches of tourism. It can partly be owed to the recognition of people that they need to devote more time to themselves and reload their energies, even in the recent hectic world. On the other hand – on the supply side –, also the economy discovered the hidden potential in health tourism. Its increasing importance is also proven by the data that show that every third guest night in Hungary is spent in a health- or wellness hotel.

Since visiting a bath is one of the oldest forms of tourism in Hungary, baths can be seen as Hungaricums and they are about high importance.

Due to its extraordinary geological endowments, one of the major break-out opportunities for Hungary is the health tourism based on medical and thermal waters (medical tourism and wellness tourism). At the same time, also medical wellness has to be mentioned among the important areas of health tourism to be developed.

The market introduction of health tourism products in Hungary started with the Széchenyi Plan in the second half of 2000. The expansion of health tourism in Hungary is also supported by the Hungarian Tourism Inc. that is responsible for the country’s tourism marketing and declared 2003 as the Year of Health Tourism, 2008 as the Year of Waters, and it focuses on health tourism also in 2011. This also underpins the importance of the permanent monitoring of market needs and changes, respectively that of the realization of innovation and related changes and developments.

Due to nature’s bless, Hungary is one of the world powers of medical and thermal springs. However, it seems to be a long way for Hungary to become a world power in health tourism. This requires highlighting not only our uniqueness, thus the complex balneological treatment/supply based on traditional, natural medicinal elements, the medicinal waters (Napi Turizmus, 2010/92:2010.05.14.: Mi lesz veletek gyógyfürdők?), but also adequate state support, furthermore cooperation of the domestic actors, respectively it is inevitable to create a complex supply to establish and maintain a leadership in quality (Napi Turizmus, 2010/45:2010.08.03.: Szemléletváltás nélkül az egészségügyügyben is csak sereghajtók lehetünk; Napi Turizmus, 2010/40:2010.03.01.: Sok a termálkút, de kevés a jó fürdő – állítja az új magyar egészségügyügyik szakkönyv), just as to establish a goal oriented system for building professionals with appropriate knowledge of foreign languages (of the main markets of origin).

1. Brief historical overview

The roots of bath history are to be found in the ancient Egypt, since having a bath was part of the daily rituals of pharaohs and their household. This habit was continued and developed by the Greeks in form of establishing open baths. However, the foundations of the first real bathing culture were set up by the Romans.

It is proven that the Romans used both cold and hot mineral water for in- and outside body treatment, and medical purposes. Two types of Roman baths are thermes and balnea. The contemporary bath doctors, the leeches were at once also the marketing tools of the baths’ renown. The importance of having a bath is also underpinned by the fact that it was part of the teaching material under the name bath protocol. Following the collapse of the Roman Empire only ruins of its bathing culture remained.

Our conquering predecessors’ respect for water is also indicated by one of the mails of the Byzantine emperor, Constantinus Porphyrogenitus, in which he ordered a “leather-basin Hungarian bath” in his yard. The first hint for Hungarian baths after the settling down is to be found in the book of Holy Stephen about the establishment of the Benedictine Abbey in Pécsvárác. In this he prescribed among the requirements of estate endowment the construction of a bath with appropriate number of bath attendants.

The ideology of the Middle Ages, the exaggerated Puritanism did not favour the further development of bathing culture. Having a bath, and the related frothy garment and behaviour were condemned and consequently strictly prohibited. The construction of the ancestor of today’s Rác bath in the age of King Sigmund was an important event. Later on King Matthias, through his wife, established the bases of the renaissance bathing culture.
Under the Turkish rule several baths were built that are still in use. (Such baths are in Buda: the Emperor, the King, the Rudas and the Rác bath.) The Turkish knew the healing effects of the different waters very well. Rules of having a bath were prescribed by the Koran. Having a bath had a preventive nature, and there is no notice from this era about separated drink cure.

The anti-bath period was revived in the Habsburg regime. The baths were held to be the main source of syphilis and other venereal diseases. Drink cures can be dated to this time. Having a bath came into fashion again with the evolution of absolutism and enlightenment. Maria Theresa took the baths’ fortune in her hand. Bottling and long-way trade of mineral waters is related to curing by water, and meant a significant source of income for the state in the era of Josef II. Also the idea of Rousseau, “back to the nature”, thus back to the traditional entertainment and having a bath, contributed to the flourishing of bathing life.

In 1839 Lajos Tognio, a doctor in Pest, listed medicinal waters of Hungary and their scientific investigation began with chemical analysis. *After the Compromise*, Hungary caught up in bath issues and a considerable bathing culture evolved. Having a bath became in fashion as leisure time increased. The development of medicine enabled successful treatment of more and more diseases. The development and the significance of baths, respectively that of treatments were shown by the establishment of the National Balneology Association in 1891.

World War II significantly shaped our bathing culture in the 20th century. After the world wars, the number of baths increased and their services were expanded. From the 1950s on, not only people seeking for cure, but also people searching for relaxation visited the baths. In the recent, 21st century Hungary, the bathing culture gained momentum again, since keeping and regaining health is of growing importance and the terminology of health tourism appeared with the Széchenyi Plan.

**Milestones influencing our bath history and culture**

- 1937: International medicinal bath conference, Budapest
- 1960s crude oil exploration projects
- 1977: UNO Development Programme
- 2000–2003: Széchenyi Plan: significant state support for the development of medicinal-, thermal- and health tourism, maybe also due to the recognition of the need of the UNO Development Programme. For details see Chapter 5.
- 2007: National strategy health tourism development: it was created in accordance with the 2nd National Development Plan, respectively with the National Tourism Development Strategy, and broad professional contribution with the objection to make Hungary a leading health tourism destination of Europe by 2015. For details see Chapter 5.

Based on the future plans, on 15 January 2011 the New Széchenyi Plan departed, that contains health industries as a prioritized programme. (Turizmus Panoráma Bulletin, 2010/146:2010.07.29.: Kiemelt program az egészségturizmus az Új Széchenyi Tervben; Turizmus Panoráma Bulletin, 2010/149:2010.08.03.: Az egészségturizmus az egészségipar húzóága)

**2. Supply elements**

There are two Hungarian locations among the best 38 health tourism destinations in the world that are listed on the TripAdvisor website ([http://www.tripadvisor.com/Inspiration-g1-c8-World.html](http://www.tripadvisor.com/Inspiration-g1-c8-World.html), 2009.09.14., Turizmus Panoráma Bulletin, 2009/146:2010.07.29.: Kiemelt program az egészségturizmus az Új Széchenyi Tervben; Turizmus Panoráma Bulletin, 2010/149:2010.08.03.: Az egészségturizmus az egészségipar húzóága), which is one of the leading opinion shapers and information portals for travellers. Budapest is ranked number 8, and Hévíz is in position 37.

Due to Hungary’s excellent geothermic endowments, the medicinal springs and thermal waters deserve a special attention in the Hungarian health tourism supply. Based on the updated (03.09.2010) register of the Board of
National Medicinal Places and Medicinal Baths, Hungary possesses the following endowments in thermal- and medicinal water reserves, and in other medical factors:

- 213 approved mineral waters
- 218 approved medicinal waters
- 74 medicinal baths
- 13 medicinal places
- 5 medicinal caves
- 5 natural medical muds (for details see 74/1999. (XII. 25.) Decree of the Ministry of Health on natural medical factors)
- 32 medicinal hotels
- 1 cure house (for details see 74/1999. (XII. 25.) Decree of the Ministry of Health on natural medical factors)

2.1. Attractiveness of Hungarian health tourism

The attractions can be divided into natural and man-made attractions. Natural attractions of Hungarian health tourism are for example mineral-, thermal and medicinal waters, climatic medical places, respectively medical peloids (mud, fango). To man made attractions belong for example the monument baths of Hungary (ITER-project) or the new masterpiece built in Makó (Turizmus Panoráma Bulletin, 2010/126, 2010.07.01.: Jó ütemben halad Makó új építészeti és turisztikai attrakciójának alapozása), just as salt and aromatherapy caves that aim at the simulation of nature/natural factors, and the physic therapy using physical impulses, or the electro-, magneto- or hydrotherapy.

Since the attractions complement each other, destinations with several attractions can achieve a higher market share by connecting their supply. The cooperation with additional tourism services is realized in the case of health tourism. (For details see Chapter 6.)

The touristic success of an attraction is influenced by its accessibility, general infrastructure, accommodations, catering, recreation opportunities, hospitality and hygiene. In the case of health tourism a special attention has to be devoted to the creation and maintenance of the bathing city or medical place atmosphere, just as to the needs of people with physical disabilities.

The following has to be mentioned by the analysis of the Hungarian medical tourism supply:

- medicinal waters: for healing and mitigating of locomotor diseases, skin diseases, gynaecological complaints, vascular diseases and digestive system
- treatments supported by Hungarian Social Security Fund: extension of medical treatments with the support of social security is determined by the Decree of the Ministry of Health No. 23/2007. (V.18.) (http://net.jogtar.hu/jr/gen/getdoc2.cgi?dbnum=1&docid=A0700023.EUM&cel=m()); one can apply for a bathing cure twice a year and it contains 6 to 15 treatments including 4 types of treatments per cure
- non water-based cure factors (among travellers with medical aims/in medical tourism): e.g. International Pető Institute (http://www.peto.hu/), National Hearth Clinic in Balatonfüred (http://www.bfkor.hu/)
- physiotherapy used in healing
- use of natural cure factors aiming recreation in medical and wellness departments of baths, respectively medical and wellness hotels in accordance with the medical-wellness trend
- medical and wellness hotels
- medical expertise
The most important unique elements of Hungarian health tourism are as follows:

- Egerszalók – bath located at the bottom of the chalk formed by the medicinal water flowing down the hill (http://www.egerszalokfurdo.hu/index.php)

- Hajdúszeobsló – the largest bath complex of Europe, the “Mediterranean coast” of Hungary, Aqua-Palace Fedett Élményfürdő (Covered Leisure Spa) (http://www.hajduszeobslologyogyfurdo.hu/)

- Hévíz – medicinal lake, thermal medical water, balneotherapy based on natural cure factors, weight bath (http://www.spaheviz.hu/hu/)

- Mátraderecske – carbon-dioxide mofetta bath (http://www.mofetta.eu/)

- Miskolctapolca – cave bath (http://www.barlangfurdo.hu/)

- Tapolca – medical cave, cave therapy (http://www hunguesthotels.hu/hu/tapolca/goyoxygenparka/)

Decisive elements of a destination’s popularity can be:


- having a “special offer” promoting its supply

Also strategy(ies) related to the development of tourism products, just as the operation of international and domestic professional organizations favour supply side.

A questionnaire survey related to the interpretation of the attractiveness of Hungarian health tourism was made in the Department for Tourism of the Apáczai Csere János Faculty at the West-Hungarian University (hereinafter: NYME-AK by the Hungarian acronym). The 100 fulltime, first semester students surveyed were participants of the course called Wellness trends and services. They associated by hearing Hungarian health tourism destinations to the following domestic places in ranking order: Hévíz (66), Bükfürdő (40), Hajdúszeobsló (40) and Sárvár (26).

2.2. Infrastructure of health tourism

The following elements make the infrastructure of health tourism:

- establishments of local tourism, such as outdoor beaches and indoor baths

- medical place establishments, i.e. establishments for the healing oriented utilization of natural elements, such as drinking and walking corridors, halls; medicinal park, hot water baths, gas- and mud baths; inhalation treatments, locomotive treatments

- climatic medical place establishment, such as medical house, large park and forest

Based on the categorization above, and by investigating http://wellness.itthon.hu monitored by the Hungarian Tourism Inc., we have the following establishments in the domestic supply:

Table 1: Establishments of the Hungarian health tourism supply

<table>
<thead>
<tr>
<th>Type of establishment</th>
<th>Number of results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bath</td>
<td>243</td>
</tr>
<tr>
<td>Experience bath</td>
<td>78</td>
</tr>
<tr>
<td>Thermal bath</td>
<td>90</td>
</tr>
<tr>
<td>Cure bath</td>
<td>75</td>
</tr>
<tr>
<td>Aquapark</td>
<td>13</td>
</tr>
</tbody>
</table>

Created by XMLmind XSL-FO Converter.
Medical cave 4

Source: own composition based on http://wellness.itthon.hu, 2010

The website http://itthon.hu/gyogy-wellness introduces the supply based on the following categorization:

Table 2: Establishments of the Hungarian health tourism supply

<table>
<thead>
<tr>
<th>Search based on the type of establishment</th>
<th>Number of results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aquapark</td>
<td>13</td>
</tr>
<tr>
<td>Day spa</td>
<td>no result</td>
</tr>
<tr>
<td>Experience- and wellness bath</td>
<td>78</td>
</tr>
<tr>
<td>Medical cave</td>
<td>4</td>
</tr>
<tr>
<td>Medical bath</td>
<td>75</td>
</tr>
<tr>
<td>Medical hospital</td>
<td>10</td>
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<tr>
<td>Bech</td>
<td>215</td>
</tr>
<tr>
<td>Thermal hospital</td>
<td>90</td>
</tr>
<tr>
<td>Natural carbon-dioxide bath (mofetta)</td>
<td>1</td>
</tr>
<tr>
<td>Swimming hall</td>
<td>142</td>
</tr>
</tbody>
</table>

Source: own construction based on http://itthon.hu/gyogy-wellness, 2010

2.3. Suprastructure of health tourism

The suprastructure of health tourism consists of the following elements:

- medical and wellness hotels
- restaurants

Based on the categorization above and the websites http://wellness.itthon.hu and http://itthon.hu/gyogy-wellness monitored by the Hungarian Tourism Inc., the domestic supply is as follows:

Table 3: Elements of the Hungarian health tourism supply

<table>
<thead>
<tr>
<th>Type of establishment</th>
<th>Number of results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wellness hotel</td>
<td>123</td>
</tr>
<tr>
<td>Medical hotel</td>
<td>37</td>
</tr>
</tbody>
</table>

Source: by the author, based on http://itthon.hu/gyogy-wellness, 2010

It is important to mention that the Hungarian Central Statistical Office registered 62 operating medical hotels and 105 wellness hotels on 30 June 2010. The capacity of medical hotels was 14,808 persons, while wellness hotels could accommodate 17,631 persons.

3. Characteristics of supply

The system of Hungarian health tourism can work effectively only if supply and demand match. To investigate the demand of health tourism, it is important to know the target groups of these tourism products and services (active youth, youth seeking for entertainments, health conscious youth, middle-aged family persons, middle-aged health preservers, health conscious elderly people, people in need of post-surgery rehabilitation and elderly...
In the following paragraphs we deal with the main characteristics of the demand of health tourism related to sub-products. The motivation of medical tourists by visiting health tourism service providers is the improvement of their health condition, respectively resolution of pain resulting from different diseases. In the background of wellness tourists’ travellers we find (in ideal case) the protection of their health condition and prevention of illnesses, i.e. prevention (http://www.oib.gov.hu/docs/egeszsegturizmus_strategia.pdf). Research results on domestic wellness tourism show, however, that following trends and fashion play a much higher role than health consciousness (Priszinger-Mayer-Formádi, 2010). In the case of medical tourism, the motivation is the meting of the motivations of medical and wellness tourism. Based on this, medical wellness guests search for (wellness) therapy treatments that are in line with their health condition, according to medical suggestion based on a physical condition test. 

By investigating the need for leisure time, it is observable that medical tourists spend – according to the duration of treatments and cures – 7 to 10 days, and often 2–3 weeks in the visited area. On the contrary, in case of wellness tourism it is a much shorter period of time, ranging from a long weekend to a maximum of one week. 

Health tourism is obviously a product assuming high willingness to pay, since people are ready to sacrifice a lot for their health and to dissolve pain. So in the case of medical tourism, just as in that of wellness tourism, visitors are characterised by a discretionary income that equals or often exceeds the average (see the following price lists: http://bukfurdo.hu/arak_arak_nyusvatartas/gyogy_es_strandfurdo/nyomtatas/ and http://www.aquaticum.hu/). In Hungary, services of medical tourism are often used by medical orders or referrals. At the same time, we have to mention that also in the case of Hungarian health tourism, financing partially or fully by private insurance companies, health funds is becoming more and more common. This is also typical for foreign tourists (mainly German speaking countries). (http://www.oib.gov.hu/docs/egeszsegturizmus_strategia.pdf)

Health tourists usually use the services and opportunities provided by the baths and hotels of the visited area. In the spare time between the treatments, they gladly visit natural and cultural attractions of the settlement and its narrow neighbourhood. Health tourists prefer higher ranked accommodations (3–5 stars based on the categorization before 1 January 2010). 

As regards the seasonality of the products, there are no significant differences on the whole. At the same time, it has to be mentioned that a larger number of guests can be experienced during the spring and autumn period, while wellness tourism is more characterised by weekly seasons (weekend consumption is more typical).

By enlisting the most frequently visited Hungarian settlements (Napi Turizmus 2010/40, 2010.03.01.: Magyarország leglátogatottabb települései 2009-ben, http://www.turizmusonline.hu/cikk.php?id=27530) based on the guests nights spent in commercial accommodations by domestic and foreign guests, the ranking contains locations that are popular on the health tourism market, such as Budapest, Hévíz, Hajdúszoboszló, Bük, Zalakaros and Sárvár. Concerning the need for health tourism, domestic tourism shows an improving tendency. The young, already working age group gladly visits domestic wellness hotels and uses the related services. Based on this, we can argue that the demand for similar services is ensured on the long-run. The main markets for health tourism oriented holidays in Hungary are the German-speaking and East-European countries. Hungary is an increasingly popular health tourism destination among Italians (Turizmus Panorama Bulletin, 2010/30:2010.02.12.: Magyarország az egyik legnépszerűbb egészségturisztikai desztináció az olaszok körében) and Russians (Az oroszokat elsősorban Budapest gyógyfürdői és kultúrája vonzza). Over time, approximation of business tourism, mainly conference tourism and health tourism, became observable. For the approach of this touristic product to further tourism products, see Chapter 6.

Main indicators related to health tourism: travel motivations of domestic/foreign guests, respectively data of medical and wellness hotels (http://itthon.hu/szakmai-oldalak/statisztikai-adatok/statisztikai-adatok).

Table 4: Turnover of medical hotels in 2007, 2008, and 2009

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<td>2007</td>
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<td>2007/2006</td>
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<td>2008</td>
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<td>2008/2007</td>
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<td>2009</td>
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<td>2009/2008</td>
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</table>
4. Trends and operation of the health tourism market

More aesthetic appearance and striving for healthy living are recently gaining on importance. Based on the publications of Cash and Pruzinsky in 2004, the number of references on body and body image in medical and psychological scientific databases increased by 2500 from 1951 to 2000. Our consumer society is characterised by a special duality: on the one hand it always tempts us for shopping, joys, permanent seeking for enjoyment, on the other hand it establishes a strong self-control in the way of living. “Let us eat conscious, move every day if it is possible, evade harmful passions, mainly smoking and unrestricted alcohol consumption, and let us strive for emotional balance” – it suggests. Passing away, death, and sickness became unspoken concepts that are not gladly accepted by the society. It is not accidental that the messages of society induce new trends in tourism that are centred around health conservation, beauty and agelessness. The modern approach is thinking in complexities, thus new waves emerge in tourism industry that shed light on the individual in a holistic approach i.e. in the triple unity of body, spirit and soul. Due to this, a dual transformation is taking place in health tourism: on the one hand the meanings of old definitions are changing, on the other hand, a new system of definitions starts to evolve.
4.1. New trends in health tourism

The requirements of consumer society also include body attractiveness and durable conservation of workability. Performance oriented company policy can be typical not only for middle- or large companies, but also for smaller firms employing only a few people. The ordinary days of competitive situations are rich in tension, and stress situations. In the accelerated speed of living, individuals are eager to spend their leisure time effectively, striving for full relaxation, cognitive, spiritual and physical recreation and refreshment. Consequently, new trends of health tourism emphasize individuality. Their aim is that everyone finds the chance of full relaxation in the given place, by using the available services.

4.1.1. Trends of supply

The spa-culture of our age is composed as follows:

- striving for naturalness (using architectural solutions that integrate artificial spaces into the environment in the most natural way). They achieve this aim with simple forms, natural construction materials and colour compositions;

- providing experience: trying to establish internal and external spaces that provide a special experience for the guests even without the given service. This is created by the unique lightning technique, and harmony of colours, plants and visual elements.

- uniqueness: uniqueness is typical not only for architectural solutions, but also in the composition of services, and the image of the spa;

- role of the individual/selfness: the taste, value system and expectations of the guests visiting spas varies along a broad scale. The diverging needs can only be served by simple forms, colours, equipments, basic services and by perfect quality and high-qualified personnel. This attracts simple architectural forms, clear walls (without paintings) and appearance of unique colours. The so designed/constructed spas adjust to the individual characteristics and style of their guests;

- establishment of unique supply adjusted to local peculiarities: uniqueness also includes the adjustment of spa services to the environment’s features and complex service packages. Such is for example the vinotherapy in one of the hotels of Bordeaux, where grape plays the main role. The famous French wine producing area incorporates the establishment of grape- and wine related image http://decouvertes.ebizproduction.com/content/make-it-vinotherapy-bordeaux. Besides vine tasting and gastronomy, red grape body treatment and viticulture also play a role. This latter is used as main component of cleansing cures combined with other wellness services;

- combination of eastern and western trends: western medicine-based treatments can be found among the services of several European and American spas (e.g. Swedish massage, Buchinger cure) and also services based on far-eastern traditions and sometimes tracing back to several thousand years (e.g. Thai massage, panchakarma). The aim is always the same (e.g. detoxification of the body), only the methods are different;

- creation of complex services: to find and establish connections to other tourism products to increase complexity (see Chapter 6).

4.1.2. Trends of demand

Related to demand trends it is arguable that there are significant differences among the West- and North-European, just as North-American guests, and also the needs of the Central-East-European guests. Analysing wellness-oriented articles of lifestyle magazines it is clear that the new meta-trends are as follows:

Balance – wellness appears in magazines as a lifestyle rather than a short, few-day holiday. Based on the articles, wellness lifestyle is a tool for coping with everyday problems, for finding balance between the different aspects of life.

balance between work/private life – many believe that in the management of the challenges of the two spheres wellness oriented travels, even the short ones, give help (the example of product development on the supply side: package developed for tired, stressed working women http://www.blumau.com/womans-job-offer-facial-massage.html)
body balance – in the 21st century, acceptance of our body, emphasis of unique peculiarities, at the same time the desire to achieve perfect body image is still present (the example of product development on the supply side: package helping the shift to healthy nutrition http://www.mountaintrek.com/our-program/weight-loss; detoxification/cleansing cures, weight loss programmes)

living in pairs – it is a well-known and more and more accepted fact that the basis of well-being is well-balanced private life. The demand for non-specific, but jointly enjoyable, consumable services is increasing (example of product development on the supply side: packages offered for pairs http://www.blumau.com/romantic-offer-couple-bath-wine.html)

Masculine emancipation – demonstration of toughness, power and masculinity towards women (and other men) is not a permanent expectation anymore. It is a more and more accepted fact that also men are dealing with their appearance, they take care about their look and not least, their health condition. It is clearly traceable in the magazines that service providers try to reach the male target group through female readers.

men beauty – men ideals of the 21st century use cosmetics, and beauty treatments to become more attractive and preserve their youth (the example of product development on the supply side: “for him” packages http://www.wahanda.com/product/815-executive-mens-package-at-dove-spa/)

men health – the demand for treatment of smaller or larger male-specific problems is increasing, just as for hair-loss or shaving related skin problems or even prostatic problems (the example of product development on the supply side: “for him” packages http://www.wahanda.com/product/815-executive-mens-package-at-dove-spa/)

Age equality – in contrast to the youth-idealizing worldview of the 20th century, men of the 21st century strive to discover the beauty and joys of all ages.

kids spa – during travelling, parents try to consider the special needs and requirements of their children, to choose a kid/family friendly service provider, even in the rather adult customized health tourism products (the example of product development on the supply side: kid friendly baths http://www.sonnentherme.com/index.php?id=41&L=2)

children health – it is well known that our health and problems in children age have a significant effect on our health condition in the adult age. One of the most threatening problems for the developed world’s society is the obesity of children, a popular topic of lifestyle magazines (example of product development on the supply side: packages offered for chubby children http://www.spa-resorts.cz/eng/kaleidoskop/children-overweight-obesity-1160.html)

seniors: people above 60 always have been a primary target group of health tourism, mainly in the medical field. However, today also preventive, mainly medical-wellness types of treatments are demanded by people above 60 (example of product development on the supply side: http://www.purespauk.com/spa_package.htm; anti-aging treatment)

A large part of the above described demand trends is, however, not presented among the Hungarian consumers, and it appears only restricted in the supply of domestic service providers. Based on a research among Hungarian tourists it can be argued that the followings of the mentioned trends can be discovered: children friendly baths, healthy nutrition, finding balance between work and private life, and the demand of elderly people for preventive treatments.

Future trends seem to hold the increase of day spas popularity. The broadening group of guest are consider day spas it not only as a weekend relaxation, but also likes to spend a few hours in them in the hectic weekdays, for example between two meetings. Since in case of day spas one cannot calculate with room prices, one has to strive for the implementation of for-profit services, complex programmes, unique machines, products. The majority of guests is searching for an affordable quality, but they are also ready to pay a higher price for pleasant, clean environment, perfect professionalism, reliability and exclusivity. This inevitably necessitates permanent internal quality control and the regular training of staff.

5. Operational environment of health tourism market

5.1. Social environments
Accelerated lifestyle of the 20th and 21st centuries, increasing pressure at workplaces and increasing societal expectations result in serious health problems. The most common illnesses rooted in stress are heart- and cardiovascular complaints, digestive disorders, skin problems, immune system disorders, and also kidney and suprarenal capsule complaints. Beside typical “manager diseases”, the certain demand base for health tourism are problems of old age related to the increasing expected life span at birth, among which we can highlight locomotive complaints, and also digestive, heart- and cardiovascular diseases different from the above mentioned.

Our lifestyle – besides other factors – has a significant impact on our health condition. The most important risk factors include smoking, exaggerated alcohol consumption, sedentary lifestyle, overweight, drug consumption and stressful lifestyle. Based on the estimations of the WHO, these factors are responsible for 75% of death cases in the developed countries.

Knowing the health condition of citizens in the European Union (http://www.antsz.hu/portal/portal/euegeszsegiallapota_16.html) and in Hungary (http://hvgs.hu/karrier/00000000005598DC) we can say that the demand for health services and health tourism will not decrease in the following years, decades.

5.2. Natural environment

Hungary has excellent geothermic endowments. Hungary is a large power in medicinal water, since after Japan, Iceland, Italy and France it has the fifth best geothermic features. This excellence is due to the fact that the value of the geothermic gradient is one and a half larger than that of the world average. It is important to mention that in the Pannon basin including also Hungary, the earth’s crust is 10 kilometres thinner than the world average. Due to the thin, only 24–26 km thick earth’s crust, the hot magma is closer to the surface, thus thermal waters of Hungary hiding in the crust are also of higher temperature.

In addition to Hungary’s geothermic endowments, we also have to highlight the country’s other natural elements that are useable in curing: special climatic endowments used in therapy, medicinal caves, medical muds, and a dry bath (mofetta) are supporting the healing of patients (Chapter 2, The elements of supply).

5.3. Technological environment

Next to the above mentioned basic features, the modern spa architecture adapted the structural units of the ancient Roman and the Turkish baths. There are almost no Hungarian baths or spas without the three types from the Roman times: tepidarium – frigidarium – caldarium. One of the most fascinating domestic examples of this is the mosaic decorated, round sauna park of the Thermál Hotel Visegrád, where the dry sauna, steam and infra cabin, and an ice feeder is complemented by aroma cabin and relaxing room that has a thermal fountain, and oriental atmosphere. Sound of the water flowing from the fountain, the pleasant gloom, the smells spilling in from the aroma cabin and the convenient relax beds provide an unforgettable experience besides ensuring abandoning relaxation http://www.thv.hu/.

Most of the modern spas recall the oriental atmosphere of Turkish baths http://www.ramadaresortbudapest.hu/hu/oriental_spa_and_fitness?sid=, which in many cases is incorporated not only in the atmosphere, but also in the elements of supply. One of the newly discovered and slightly modified services is the hamam treatment that is basically nothing else than a peculiarity of the middle aged Turkish baths. A special, mosaic decorated room is needed where there is gloom, high temperature and humidity, and is dominated by peace and quiet music. The person making the therapy rubs in the guest with an intensively bubbling, special oily soap, and then s/he flushes the foam with lukewarm water, and repeats the manoeuvre several times. Meanwhile, the guest is lying naked on a mosaic plate that is usually octagonal or round.

The international categorization of baths was made by the International Spa Association (further categories: http://itthon.hu/site/upload/mtrt/Turizmus_Bulletin/01_12/Sz2.htm).

The modern spas are eager to offer also services that are labelled by the name of one or other countries and are wide-spread all around the world. A selection, edited by Bodecker and Cohen, was published in 2008, with the title of “international spa language”.

5.4. Political environment
The development of health tourism, as one of the strategic segments of domestic tourism, plays a major role in Hungarian national and regional tourism development strategies.

In the National Tourism Development Strategy 2005–2013, health tourism is listed among the national priorities of touristic product development. The Strategy treats health tourism as a prioritized product until 2013, aiming to improve the national and international competitive position of the product by the end of the strategic period. It should be achieved by complex product and infrastructural developments in accordance with the recent trends, and with the clear division of medical and wellness branches. In addition to these, health tourism plays a role among other priorities of the Strategy, such as the development of human resources meeting the special needs of the product. (The National Tourism Development Strategy is available under: http://itthon.hu/szakmai-oldalak/strategiai-dokumentumok/nemzeti-100112.)

As we have already seen in Chapter 1.1, further development of health tourism plays an emphasized role in the New Széchenyi Plan (just as it did in the first one) that is in force since the January of 2011. At the time of writing this chapter, we do not have detailed information on the New Széchenyi Plan, but most likely it can be found under http://www.kim.gov.hu/ by the publication of the electronic draft.

In addition to tourism development, other strategies also contain health tourism. In the 2nd National Development Plan – more commonly known as New Hungary Development Plan – (that is also for the period 2007-2013), the operational programmes of all administrative regions contain health tourism as a development field. In the latest 2009–2010 development period, tendering opportunities were opened under the name “Development of tourism investments with selected economic impact” and “Activities related to the improvement of the framework conditions and competitiveness of health tourism in places of international attractiveness determined by the National Health Tourism Strategy”. Except the second call in the Central-Transdanubian Region and the first call in the Central-Hungarian Region, prioritized tenders were opened in every region for both calls. (Operational Programmes of the regions are available here: http://www.nfu.hu/uj_magyarorszag_fejlesztesi_terv_2.)

On the commission of the Secretariat for Tourism of the Ministry of Municipalities and Spatial Development, with the inclusion of academic and business tourism professionals, the National Health Tourism Strategy was developed in 2007 (downloadable from http://www.oib.gov.hu/docs/egeszseg_turizmus_strategia.pdf). The strategy enlists seven priorities and the related tasks. The priorities are in keywords: conscious product development of medical places, harmonization of health care and tourism, development of wellness services, development of engaged hotels, effective marketing activity, development of educational-training system, and the creation of operational frameworks.

6. Cooperation with other products, synergy

This branch of tourism has several advantages compared to other, traditional branches. The most important ones are as follows:

- practically no or minimum negative effect of seasonality;
- longer average stay due to the consistency required by the related treatments;
- the specific touristic spending is 30–35% higher on the average than in other fields of tourism. This can be explained by the longer stay, by the treatments received, and with the higher willingness to pay that is due to the aim of preserving/regaining health;
- it dissolves spatial concentration. Thermal water can be found under 80% of Hungary’s territory, so there are opportunities to establish health tourism services on several locations;
- every HUF 100 spent by guests in health tourism induce HUF 167 additional production;
- every 100 workplaces created in this tourism branch create 214 additional new jobs in the national economy.

Besides the use of health tourism services, different programme packages – including for example beauty cures, manager cures, active- and sport tourism, and the inclusion of the given destination’s values in the field of family tourism – must be offered to the tourist, with the possibility of quality (longer) stay and for the aim of real capacity utilization and creation, and the preservation of competitiveness.
Health tourism can be connected to further products:
- Conference and wellness (see the chapter of Business tourism)
- Village tourism and health tourism (best practice: Turizmus Panoráma Bulletin, 2010/150.: 2010.08.04: SPA Falu a mátraaljai Sirokon)

Termálvizes Őkoszálloda épül a Lázár Lovasparkban
- Religious tourism and health tourism ~ tradition, faith, healing (e.g. relation between the Mary Route in North Hungary and baths)
- Beauty cures and health tourism (e.g. vinotherapy): http://www.kelownaspa.ca/vinotherapy.html.
- Gastronomy and health tourism (bio-kitchen and bio-foods, menu card showing also calories, reform cooking book)

7. Practice of product development

As we have seen at the introduction of the political environment of health tourism (Chapter 4.4), calls for tenders supporting health tourism are opened in every region. The topic of tender calls is different year by year, as a prioritized area for example in 2007, tenders for the development of competitive touristic products and attractions could be submitted which primarily aimed at bath development related to health tourism (calls for tenders downloadable from http://www.nfu.hu/doc/890 – by rolling down the operational programme of the regions, and searching for prioritized projects). In the 2010 calls, tenders for the prioritized products introduced in Chapter 4.4 could be submitted. Among the not prioritized products we can find calls for the establishment of accommodations, and tenders for quantitative and qualitative development of already existing accommodations (see by surfing among the operational programmes of the individual regions).

Also, the numerous health tourism developments related to the first Széchenyi Plan have to be mentioned here. Due to the supports, the number of wellness hotels significantly increased, so far that from 2004 onwards, next to medical hotels, also wellness hotels appeared as a distinct type of accommodations in the statistics of the Hungarian Central Statistical Office. Due to the support of the Széchenyi Plan, several baths have been reconstructed (http://www.sarvarfurdo.hu), and also new investments were also realized (http://www.varkertfurdo.hu/).

It is typical in the Hungarian practice that the baths do not diversify their support; they develop services instead to several target groups that often have different needs. However, as it is also included in the health tourism development strategy, it would be desirable to separate the services provided to the target groups with different needs (see the differentiations “healing water”, “regenerative water”, “entertaining water” on page 61 http://www.oib.gov.hu/docs/egeszsegerturizmus_strategia.pdf).

Excellent examples of supply diversification are three Austrian spas which follow the thematic above. We find a product development in Bad Gleichenberg, designed primarily to seniors based on “healing water” (http://www.thermenland.at/2177_DE-Steirisches-Thermenland-Thermen-Bad-Gleichenberg.123). Related to the medicinal bath, the main keywords are the following: relaxed life, health, silence, relaxation, reliability. A copybook example of “regenerative water” can also be found in Bad Blumau in Styria (http://www.blumau.com/). In this case the words attractive, rich, novel, trendy, successful and luxurious can be highlighted. Also in the family friendly “entertaining water” category, one of the baths of the Steirisches Thermenland, Sonnentherme bath in Lutzmann has to be mentioned (http://www.sonnentherme.com/index.php?id=41&L=2), and keywords as family, programmes, entertainment, safety, child friendly, price sensible can be determined.

There are establishments that are excellent examples of the diversification of services based on target groups also among the medical and wellness hotels. A Hungarian example among the medical hotels is the Danubius Hotel Gellért****, which is a classic hotel based/building on traditional supply elements offering numerous
services based on medical water (http://www.danubiushotels.hu/hu/szallodak/magyarorszag/budapest/danubius_hotel_gellert/gyogyaszolgaltatasok). One of the newest hotels in Hungary is the Hotel Spirit***** in Sárvár, which was awarded the Best Destination Spa title in 2010. As the prize shows, the hotel is among the best wellness hotels, and it bases its services mainly on the medical water of Sárvár, however, extending its supply with broad wellness supply (http://www.spiritohotel.hu/hu/hotel). The only really children/family friendly hotel of Hungary is also located in the countryside – the Kolping Hotel Spa&Family Resort**** in Alsópáhok, that fully bears in mind the needs of smaller or bigger children and families as well (http://www.kolping.hotel.hu/).

8. Research peculiarities of health tourism

Most of the researches related to health tourism are mainly carried out in the field of tourism and health care. Unfortunately, permeability between the research fields is not perfect. Priority 2 of National Health Tourism Development Strategy is the harmonisation of health care and medicine. As it is argued in the strategy, active participation of the medical professionals is inevitable both in medical and wellness tourism (page 79).

Balneotherapy is a special supply element of Hungary; however, to enhance international demand, it is important that balneotherapy should also meet the requirements of evidence based medicine as well.

Health tourism is a thoroughly researched area also in international comparison, several professional books and journals are published in the field. It has to be mentioned that in English terminology the term called “health tourism” is less frequently used, “spa tourism” is preferred in the professional literature.

It is important to mention that the expression ‘spa’ is increasingly spreading in the world; however, it does not always mean the same:

- North-Europe (Finland, Iceland): pleasure bath with warm water
- Central-Europe: thermal bath offering medical services
- USA, Asia: service provider offering physical and mental refreshment, it is imaginable in baths even without thermal water (OEFS, 2007)

Different comprehension of the expression can cause research difficulties.

A further problem is that health tourism related statistical data can diverge to a smaller or larger extent in different sources, since updates of Internet databases differ in their frequency. Unfortunately it causes problems for example in the case of trend and supply research.

The investigations of baths are also exacerbated by the fact that the supply of statistical data was not compulsory for these establishments even until recently, which can be an obstacle at the analysis of demand for the baths. Also, it relates to the research of demand that capacity analysis of baths is extremely complex and requires consideration of several factors (for example size of open/indoor surfaces, water surface etc.).

Main data sources available for investigation related to health tourism (without striving for complexity) include:

- database of the Hungarian Central Statistical Office (available on-line and printed as well);
- database of the Board of National Medicinal Places and Medicinal Baths on the domestic healing factors;
- data of medical and wellness hotels (directly from the hotel or from the HCSO database);
- number of pools (at this time available on the websites of the baths, or based on personal contacts/);
- number of National Healthcare Fund treatments required;
- database of the Hungarian Tourism Inc. (summarized by the yearly publication titled Tourism of Hungary).
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5. fejezet - Tamara Rátz: Cultural tourism

1. The concept of cultural tourism

Cultural tourism in the broader sense is a touristic product the central element of which is attraction satisfying the intellectual needs of the tourists, in the most comprehensive sense of the word. From product development and product management aspect, however, this approach is hard to handle, because on this ground practically any leisure travel can be fitted into the concept of cultural tourism, because the new experiences will inevitably give tourists new skills and knowledge.

In the narrower sense cultural tourism is a touristic product where the motivation of the tourists is definitely a cultural one, and the services on the supply side of the products satisfy the needs of culture-motivated travellers. Definitely cultural motivations can be e.g. the visiting of monuments and heritage sites, participation in festivals, visiting exhibitions, museums, attendance of theatre performances or concerts, or a study tour or pilgrimage. In this approach the essential attractions of cultural tourism are dominantly programmes, events and sights of interest belonging to the so-called “high culture” or “elite culture”, such as classical music, opera, ballet or classical fine and performing arts. We also have to take into consideration on the definition of the concept, however, the growing role of the so-called “popular” or “mass culture” in today’s cultural tourism (significant masses of visitors are attracted e.g. by the popular music festivals or sites and sights of interests related to commercially successful Hollywood films). In addition, in the last decades we could see that it is more and more difficult to categorise an event or an establishment strictly to one class: artists and facilities traditionally targeting the cultural elite – for example operas, classical music festivals, museums – are trying to address a growing range of visitors with their programmes (e.g. the concerts by the Three Tenors or the performance of Luciano Pavarotti at the football world cup of 1990 popularised opera for masses of people). It is due, on the one hand, to the fact that in the widening interests of the postmodern tourists both Beethoven and Madonna find their place, i.e. elite and popular culture well supplement each other instead of the exclusive presence of either type. On the other hand, formerly elitist cultural institutions, partly parallel to the changes in the consumers’ demands, are placing more and more emphasis on communication with their visitors and the integration of the broadest possible audience into this communication process – partly inspired by their mission and partly due to economic constraints.

Melting the two approaches above one can come to the comprehensive definition of cultural tourism: it is a tourism product in which the motivation of the tourists representing the demand is getting to know new cultures, the participation in cultural events and the visiting of cultural attractions, and the attraction making the central element in the supply is the specific and unique culture of the visited destination.

The appearance of culture in tourism

The culture of the destination appears in three major forms during the development of tourism. The category of non-living culture contains e.g. buildings (like the Eiffel Tower), architectural styles (such as the European Route of Brick Gothic), and pieces of art (e.g. Vigeland Statue Park in Oslo) or the tools used in everyday life (like glass factories and the process of glass manufacturing in Iittala in Finland). Built environment shows up as a background for the other activities of the tourists, on the one hand, influencing the total of the experience: a cup of coffee tastes much better on the terrace of the main square of a Renaissance small town than in a modern buffet in a building of socialist architectural style, but the perceived quality of a hotel service is also influenced by the view (Photo 1). On the other hand, milieu, atmosphere palpable in the built heritage of a destination can be a significant attraction for tourists with cultural motivations: according to a 2009 survey of Cultural Budapest e.g. foreign visitors travelling to Budapest were most interested in the panorama, architecture and cultural programmes.

Photo 1

View over Sagrada Familia from the terrace of a hotel in Barcelona

Foto1_Barcelona.jpg

Photo by Rátz, Tamara 2011
Elements of non-living culture can be utilised in tourism without human contribution, too, although these constituents were of course made by creative human activity. For most tourists “sightseeing” is a dominant programme, during which the historical centre, churches, fortresses, castles, museums etc. of the given destination are seen. Although opening times and the programmes offered by the respective establishments considerably influence the experience of the tourists, the built environment of a settlement, i.e. the streets, buildings, street furniture, with their entire atmosphere, are visible, liveable and experiencable in 24 hours a day.

The concept of culture manifested in everyday life includes e.g. different leisure activities, the lifestyle of the inhabitants of the destination, their behavioural and clothing habits, their gastronomy or popular leisure time activities. In Finland a sauna session is a must-have experience also from a cultural perspective, a holiday in Egypt or Tunisia is incomplete without trying camelback riding, in Argentina tango dance schools expect foreign guests, whereas in England several elegant restaurants have fish & chips on their menus (Photo 2). Although this aspect of culture is hardly influenceable by the tourism sector, it is just the moments of everyday life that make the deepest impression on visitors.

Photo 2
Fish & chips – culture in everyday life as a touristic experience
Foto2_Fish_and_chips.jpg
Photo by Rátz, Tamara 2010

The concept of animated culture covers, on the one hand, activities – such as festivals, carnivals, traditionalist programmes, replay of historical events or the animation of times gone by – which have been created primarily for tourism purposes in order to increase the attraction of, and the number of visitors to a destination or a touristic site (like the Historical Equestrian Games organised in the castle of Sümeg). On the other hand, this category includes several events which, in addition to their relevance for tourism, contribute to the preservation of the cultural identity of the local population: the Busó Festival of Mohács e.g., on the intellectual world heritage list of UNESCO, is a very good example for the synchronicity and mutual interdependence of a cultural tourism event and a living folk tradition. This category also involves personal interpretation techniques during which the interpreter animates the given sight of interest in a costume fitting the theme of the attraction, as a fictional or real person of the past (Photo 3).

Photo 3
Guide in the costume from the time of Henry VIII in the Hampton Court castle in England
Foto3_Hampton_Court.jpg
Photo by Rátz, Tamara 2008

2. History of the development of cultural tourism

The history of cultural and heritage tourism goes back thousands of years in time: the ancient Greeks or Romans had travels with this motivation, already, but the medieval pilgrimages can also be categorised here, as can the Grand Tour starting in the 18th century. Today it is one of the most rapidly developing branches of tourism.

Although the ancient travels were primarily motivated by reasons of internal or external urge like religion or state administration (where the travellers either followed their inner or external forces when making decisions on the destination of the travel, the route leading there and the services applied), in the Roman Empire we could see examples with similar motivations like today, i.e. leisure and culture-oriented tours. In history it was actually the Romans who first developed tourism into an industry, as they were the first to leave their place of residence in larger numbers in order to have fun, learn culture and see the world. Visiting the Egyptian pyramids or the Greek cities meant a similar heritage experience for the antique Roman traveller to the experience of a culture-oriented traveller of the 21st century. The Great Journey becoming popular in the ancient Roman Empire, with Hellas, Asia Minor and Egypt as the main destinations, was very much similar to the later Grand Tour. The original list of the Seven Wonders of the Ancient World can be taken as a preliminary of today’s cultural routes (Photo 4). Cultural motivation during the ancient travels was often related to religion too, so the contemporary tourism services were usually established in the vicinity of holy places; also, several sites of mythology became important touristic destinations.
It is only the Pyramids of Giza from the seven wonders of the ancient world that still exist

In the centuries following the fall of the Roman Empire the political and social relations transformed. As a consequence of the disintegration of centralised state power, the security taken almost for granted in Europe in the time of the so-called ‘Pax Romana’ ceased to exist, and a few centuries later only fragments of the very well built Roman road network of approximately 200,000 kilometres could be found, the rest perished (Photo 5).

In the centuries of the Middle Ages travelling became definitely dangerous, and the majority of the population lost their rights of free movement after the establishment of the feudal system. Although the interest in the heritage of the old days remained – as it is demonstrated by Viking graffiti in the Hagia Sophia cathedral in Istanbul from the 9th century (Photo 6) –, in the absence of security, travels with entertainment, cultural or educational motivations almost completely disappeared.

As a result of the strengthening of Christianity, religious tourism aiming at pilgrimage places became the most important touristic activity: already in the ancient times Rome was a significant pilgrimage place, as was Santiago de Compostela (the El Camino pilgrimage leading to the tomb of Saint James is walked by 130-140 thousand annually), a destination that is becoming very popular again these days. The penetration of Christianity had a considerable impact on city architecture too: medieval gothic cathedrals still attract millions of tourists to e.g. Chartres or Canterbury. Examining the relationship of tourism and culture, travels of the guild apprentices and of the students and professors should also be mentioned: they were catalysts for the development of culture in Europe, because these wonderers returned to their places of origin, taking back the habits and culture that they had learnt elsewhere.

Arts, architectural, arts history and educational tours similar to the present forms of cultural tourism first appeared in Italy in the 14th century, after the birth of Renaissance, and then they spread to other countries of Europe during the 16th and 17th centuries. The Renaissance time was characterised by the discovery and rebirth of the Antique civilisation, receding from the Church, the spread of secular thinking, realistic attitude to life, the desire for knowledge and the joy of life and love of beauty. All these ideals appeared in arts and architecture but also in everyday life. The values of Renaissance culture are still among the most important attractions of cultural tourism today (Photo 7).
From the 16th century, the start of the new era, bourgeois development and the rearrangement of the social class relations, the increase of leisure time end discretionary income led to a process that allowed the democratisation of tourism and resulted in the birth of the Grand Tour ("Great European Journey") which was extremely important for the development of cultural tourism. The original objective of the Grand Tour, especially popular in the 17th and 18th centuries, was the visit of places of cultural and historical relevance: mainly young English aristocrats spent some two years with the visiting of the major cultural centres of Europe. The classic route of the Grand Tour included destinations like Paris, Florence, Venice, Rome, and after the mid-1700s – the exploration of Pompeii and Herculaneum – Naples also became a destination that could not be missed. The list of destinations visited contained locations that well represented certain phases of the cultural development of Europe and which are also among the most important destinations of cultural and heritage tourism today.

The first package tour centred on cultural heritage was organised at the end of 19th century by Thomas Cook, the “father of tour operators”, for the visit of the antique Egyptian sights of interest, but a significant number of English guests arrived at that time at Italy (Photo 8) and Greece, too. In the field of cultural and heritage tourism, the organisation of the tourism services into packages can be especially important. The tourists take a serious risk, anyway, by buying an intangible service, and without knowing the space they visit they are rarely able to put together on their own a complex product that they want to enjoy. In the area of cultural tourism, in addition, it frequently happens that visitors travel to destinations with foreign and exotic culture where the maker of the tourism package does not only carry out practical organisation tasks but also has a key role in making smoother the encounter of different cultures.

In the development of cultural and heritage tourism a significant boom took place in the second half of the 20th century. This was partly due to the same reasons that resulted in the explosive development of the tourism sector as a whole (increased leisure time, growing discretionary income, growing mobility, development and expansion of the services supply of the tourism sector) but there were also specific reasons in the background:

- The growing schooling level of the population in the advanced economies – because the higher the school education of a person, the more s/he is interested in culture and heritage values, both in the leisure time in his/her everyday life and as a tourist.

- The more and more active participation of media in the promotion and propaganda of cultural programmes and attractions – in addition to the weekly or monthly periodicals and TV and radio programmes specialised on culture and/or tourism, almost all lifestyle magazines edited for either men or women feature cultural programme offers and/or tourism section, thus the average consumers get much more information, they are exposed to much more promotional stimuli triggering consumption.

- The creation of new, exciting heritage tourism – heritage centres using the latest technical devices, offering an interactive experience, like e.g. the Jorvik Viking Centre in York in England are definitely more attractive for visitors interested in culture but having no in-depth classical education than heritage sites left in their original conditions and thereby almost incomprehensible without additional information. A similar role is played by different cultural events which make past a liveable experience (Photo 9).

Reminiscing of a popular feast called Floralia in Aquincum

Photo by Rátz, Tamara 2007
The increase of the individual and social recognition and support of heritage tourism – in the history of the mankind, the nostalgic appreciation of the tangible elements of the past is a relatively new phenomenon, as a result of which values that have been preserved from the past are now protected much more strictly. Activities and hobbies done for getting to know the past and the identity of the individual and the narrow or wider community – from family history research through the systematic visit of World Heritage sites to participating in the replay of historical battles – have become a pastime enjoying the recognition of the society.

An increased demand for new forms of travelling, programmes and activities – parallel to the growing number of “experienced tourists” (i.e. the ones who have been regularly travelling for decades, have had a very large number of experiences and now possess a significant basis for comparison, and are able to clearly state their demands and preferences), the number of visitors on the tourism market longing for real experiences is constantly growing.

3. The supply of cultural tourism

The core, the central element of cultural tourism as a tourism product is the attraction which triggers interest of the demand and on which touristic infrastructure is built: on the one hand, directly – infrastructure allowing the exploration and marketing of the attraction –, on the other hand, indirectly – this is the touristic suprastructure allowing the stay and the consumption of the tourists. A complex touristic product is created, actually, in the lucky case when the infrastructure and suprastructure services supplementing the attraction of cultural value, in the centre of the product, also have strong cultural character (of course the experience of tourists can be satisfactory if the tiring act of the visit to cultural sites and events is followed by a rest not in a theme hotel but “only” in a high quality accommodation).

3.1. Attractions of cultural tourism

The attractions of cultural tourism have become definitely versatile, because, as we could see in Chapter 1, culture itself is a complex notion. Accordingly, cultural attractions can be categorised on many different grounds. On the basis of the character of the attraction we can distinguish events and places or locations. The duration and consequently the visitability of events is restricted, they are one-off events or ones recurring with a certain frequency (the Sziget – Island – festival is organised annually, the WAMP Budapest artist market every month). Space-type attractions can be found all the time, and although their visitability may be restricted by opening hours or the limits of capacity, they can offer some kind of experience in 24 hours a day and in 365 day a year to visitors (Photo 10).

Photo 10
The Matthias Church in Budapest is a sight of interest of the Hungarian capital city even out of opening hours

Looking at the attractions of cultural tourism from another aspect, we can talk about attractions of materialised, tangible and intellectual, intangible character. The former category involves e.g. architectural values and pieces of art, while the latter may be music, performing arts and traditions, or lifestyle. Of course intangible values are very often demonstrated through tangible objects (e.g. playing a symphony inevitably takes musical instruments, but the milieu made by the physical constituents of the music hall also influence the experience to a large extent), also, they jointly create the value to be preserved, attractive for tourists. The attraction of the Taj Mahal in India for example, now listed among the seven new wonders of the world, is due not only to the astonishing building itself but also to the connected wonderful love story (Photo 11).

Photo 11
Taj Mahal was built in the 17th century by Mughal emperor Shah Jahan as a memory of his loved wife, Mumtaz Mahal
On the basis of the birth of touristic attractions we can differentiate between natural and man-made ones. In cultural tourism it is obviously man-made attractions that are in the centre, but the popularity of the cultural attractions may be complemented and reinforced by natural factors. On the island of Crete for example the basis of cultural tourism is the historical heritage of the Minoan civilisation in the first place, but even for the most dedicated cultural tourists, sunshine and seaside are attractive factors as well. It may as well happen that the natural heritage serves as the foundation of the cultural identity of the destination, like e.g. the Hortobágy National Park, i.e. the “Puszta” in Hungary.

A significant part of the attractions in cultural tourism are multifunctional, i.e. guests are received while also maintaining the original operation. Such are e.g. religious locations (like the St. Stephen Basilica or the Benedictian Abbey of Pannonhalma) or operating production plants – some of them operate exhibition centres or museums definitely for the reception of visitors (Photo 12) –, but this category also includes settlements of cultural or historical character (like Szentendre or Cambridge) as well, where the whole of the historical settlement centre can be seen as an attraction. A common feature of multifunctional attractions is that they originally were created for non-touristic purposes, so the presence of visitors may raise many problems in connection, among other things, with capacity, accessibility or security.

Photo 12

The Guinness Storehouse in Dublin is meant to make visitors see how Guinness beer is made

Photo by Rátz, Tamara 2007

From a touristic aspect it is worth looking at the spatial location of cultural attractions in the broader sense, where we can distinguish linear, nodal or cluster-like attractions. The first category contains attractions which can only be visited along a route or route network, such as the Great Wall of China (Photo 13) or Road 66 between Chicago and Los Angeles. The latter sub-group involves attractions relatively easy to spatially designate; they may be single attractions like the Parliament in Budapest or the MODEM Centre of Modern and Contemporary Arts in Debrecen, or cultural landscapes covering larger areas and including significant cultural values.

Photo 13

The Great Wall of China

Photo by Rátz, Tamara 2002

The concept of cultural landscape means natural areas shaped by human activity, with cultural relevance where the co-existence of man and nature, the interaction of civilisation and nature is represented. During the examination of cultural landscapes we can distinguish among the following types:

- Cultural landscape designed and implemented by man, clearly designable – this category involves parks and gardens built with aesthetic, social and recreational purposes (for example the Dessau-Wörlitz Gardens in Germany).

- Organically emerging cultural landscape, created with social, economic, administrative and/or religious purposes, functions and tasks.

- Cultural landscape from the past where the evolutionary process finished in the historical past but its materialised remnants can still be seen (like Stonehenge and its area).

- Still developing cultural landscape that has materialised values from the past and utilises them in its present socio-economic life (for example the historical wine region of Tokaj).

- Cultural landscape related to the natural environment, built on strong religious, artistic or cultural associations, where the significance of the tangible cultural heritage values can be relatively modest or even completely absent. An example for this is the Tongariro National Park in New Zealand, whose mountain peaks
are considered as sacred by the native Maori population but the outsider visitors cannot see religious buildings, so they can only get to know the spiritual significance of the place by an adequate information service.

The heritage values on the UNESCO World Heritage list are especially important cultural attractions. On the basis of the World Heritage Convention the concept “cultural heritage” comprises of monuments (including among other things architectural masterpieces, gigantic statues and paintings or archaeological values), groups of buildings and locations. The concept of “natural heritage” covers natural factors (physical and biological systems and their groups), geological formations, the habitats of endangered species and other natural areas. In the spring of 2011 the list contained 911 locations, of which 704 were cultural heritage items, 108 belonged to the natural heritage category and 27 were “mixed” heritages. All locations represent the national heritage and the culture of the respective country, and the most renowned ones have become the symbols of their countries and of the national/cultural identity on the global market of cultural tourism (the most popular sights of interest in Egypt e.g. include both the Pyramids of Giza and the tombs of the Valley of the Kings). Heritage attractions of this kind are of outstanding importance from a touristic perspective, because they operate as image-making factors, “flagships”, so they can actually generate tourism both for themselves and for their whole countries. Until the spring of 2011 eight locations of Hungary had been given the world heritage status. Although cultural tourism is usually the tourism product of urban spaces, all world heritage sites in Hungary, with the exception of the ones in Budapest and Pécs, are situated in rural areas, and thereby they can contribute to the strengthening of the attraction of the rural Hungary and the decrease of the spatial concentration of touristic demand in Hungary.

3.2. Elements of the infrastructure of cultural tourism

Looking from a tourism theory aspect, the concept of touristic infrastructure means establishment and services promoting the exploration and marketing of the attraction which is the core of the product. The static elements of the infrastructure of cultural tourism are establishments which are fixed in space, such as museums, visitor centres, theatres, opera houses and concert halls. We can often see overlaps when looking at the concepts of attraction and infrastructure: although in the case of a museum it is basically the collection, the pieces of art exhibited that are the main attraction for visitors, in several cases the building that serves as the exhibition place is just as exciting as the exhibition itself (Photo 14), in fact, e.g. the Guggenheim Museum in Bilbao has become a symbol of the Basque city mainly because of its architectural solutions.

Photo 14

In the palaces of the Hermitage Museum in St. Petersburg it is the combined effect of the halls and the beauty of the pieces of art that determines the experience of the visitors

Foto14_Ermitazs.jpg

Photo by Rátz, Tamara 2010

The main task of transport vehicles categorised as parts of the dynamic infrastructure is the provision of access to the sights of interests and locations in the destinations of cultural tourism. Sightseeing buses for example allow visiting the main cultural attractions in a destination, and their routes assist the spatial orientation of the tourists by marking the most important, “must see” attractions. It is possible, however, in the field of transportation services as well to put culture in the foreground, for example by the touristic use of vehicles with cultural value (examples for such a solution are the sightseeing tours in Vienna with oldtimer cars or the Trabant Tour in Budapest). Even public transportation can be used for the propaganda of cultural tourism: in Essen for example, a German city that was one of the European Capitals of Culture in 2010, tram line 107 was converted into a cultural line. Along the route of the tram that can be used with an ordinary tram ticket, 61 cultural attractions can be seen, including two operas, a cathedral, a concert hall, two significant museums and the world heritage site of the Ruhr District, the Zollverein Coal Mine Industrial Complex (Photo 15).

Photo 15

The “Kulturlinie”, i.e. the „Culture Line“ in Essen

Foto15_Kulturlinie.jpg

Photo by Rátz, Tamara 2010

3.3. Touristic suprastructure in cultural tourism
The goal of services categorised to the touristic suprastructure is to satisfy the demand of guests related to their stay, accommodation, catering and other needs. **Primary suprastructure** includes accommodation and catering facilities, whereas secondary suprastructure is the retail trade sector. Although tourists travelling with cultural motivation do not necessarily have special requirements regarding accommodation and restaurants, they may find services with cultural USP more attractive (USP = Unique Selling Proposition, a unique characteristics of a product that guarantees a competitive edge on the touristic market). The tourism development trends of the last years include the creation of **thematic** services, which is also manifested in the field of touristic suprastructure.

In the **accommodation sector**, a cultural theme is the central element of the Library Hotel in New York, in which, following the categorisation system of Dewey, there are 10 storeys with 60 rooms and over 6,000 books for the guests: the theme of 9th floor for example is “history”, within that, Room 5 has a sub-topic called “Geography and Travel”. Another thematic hotel of cultural character is the Shakespeare Boutique Hotel in Vilnius, in which each room is named after a famous writer or a topic related to a piece of literature, and the decoration is motifs from the given work (Photo 16). Especially attractive accommodations from a cultural perspective are those that used to serve as accommodations for famous writers, poets or artists, such as Hotel Gritti Palace in Venice, where Ernest Hemingway was a recurring guest in the 1940s and 1950s.

**Photo 16**

**Bathroom of the Verona Room in Shakespeare Boutique Hotel in Vilnius**

*Foto16_Vilnius.jpg*

*Photo by Rátz, Tamara 2009*

Culture as a theme can appear in various form in **catering industry** as well, contributing thereby to the creation of a complex cultural tourism product. There are several restaurants, cafés, beer bars etc. all around the world that were haunts of important artists and this is partly the reason for their popularity among guests with cultural interest. In the Centrál Café in Budapest for example frequent guests were Endre Ady, Frigyes Karinthy, Zsigmond Móricz or Mihály Babits. Similarly attractive are catering facilities appearing in literature or films, like the U Kalicha beer bar in Prague, the favourite pub of the good soldier Švejk. A special combination of culture and catering is provided by cafés in bookstores, like for example the Magda Szabó Bookshop and Café in Debrecen (Photo 17), or the galleries, exhibitions and arts programmes located in cafés or restaurants.

**Photo 17**

**Magda Szabó Bookshop and Café, Debrecen**

*Foto17_Szabo_Magda.jpg*

*Photo by Rátz, Tamara 2009*

A special position is occupied in the field of cultural tourism related catering by the restaurants, cafés and buffets of museums, theatres and churches, which – besides their income generating function – partly complement the cultural experience, allowing visitors to have a rest and refresh themselves (Photo 18), but they can also appear as attractions in their own rights on the tourism and leisure time market: the KOGART Restaurant in Budapest for example is attractive not only for visitors of the arts exhibitions.

**Photo 18**

**Café in the cathedral of Turku, Finland**

*Foto18_Turku_Domcafe.jpg*

*Photo by Rátz, Tamara 2010*

A special example for the integration of culture and catering is the compilation of menus with cultural themes or the special names given to certain meals, either by the use of the cultural heritage of a given destination or attraction – the café of the Royal Castle of Gödöllő e.g. has Sisi coffee on its menu – or perhaps connected to a topical cultural programme (Photo 19).

**Photo 19**
“European Capital of Culture” cake in Overbeck Café in Essen

Photo by Rátz, Tamara 2010

The secondary touristic suprastructure in cultural tourism is the retail sector services, with special regard to the souvenir shops of the cultural facilities, for example museums, theatres and heritage centres – which have, in addition to their income generating functions, significant promotional roles –, or the thematic elements of the souvenir supply of the destination. It is important that the souvenir shops of the cultural attractions should be available without entry tickets, and on planning the flow of visitors, the route of leaving the attraction should be designed in a way that the direction to the exit would in all cases lead through the souvenir shop. The range of souvenirs of cultural thematic is almost endless: in addition to richly illustrated photo albums, catalogues, books, posters, CD-s we can also find subjects bearing the motifs of the attraction (ballpoint pen, mug, glass coaster, refrigerator magnet, jewellery, lighter, key ring, umbrella, scarf, tie, serviette, notebook, statue, jigsaw puzzle, deck of cards, bag, T-shirt, kitchen towel, thimble, chocolate, tea, coffee, biscuit – or even the canned air of the destination (Photo 20).

Photo 20

Souvenirs in the souvenir shop of the Aya Sophia in Istanbul

Photo by Rátz, Tamara 2010

It is important, however, that only tasteful, good quality souvenirs, matching the cultural heritage of the visited destination or attraction in theme, form and material, should be in the retail stock of the souvenir shops of cultural tourism, as the goods manufactured in mass production are definitely disillusioning (Photo 21).

Photo 21


Photo by Rátz, Tamara 2008

4. The demand for cultural tourism

Starting from the approaches of cultural tourism in Chapter 1 we can state that culture in general has a strong impact on the demand of tourists, because it is the intellectual and aesthetic development of the individuals that determines what activities they find pleasure in, what pastimes they choose and what they spend their discretionary income on, and it also impacts what destinations tourists visit. The schooling and educational level of the individual also influences the extent to which s/he can appreciate as a tourist the attractions visited: where the antique Rome comes alive to visitors possessing in-depth historical knowledge, the less informed guests will sooner or later grow tired of the view of the ruins. Of course the different cultural background will also influence the perception of the respective elements of culture by tourists: Indian dances for example can only be enjoyed to a limited extent by the outsider European spectators, in absence of the necessary background information (Photo 22).

Photo 22

Dance presenting the story of Rama and Sita in Jaipur, India

Photo by Rátz, Tamara 2008
Tourists making the demand of cultural tourism can be categorised from several different aspects. Looking at the interests and the activities of the visitors, and the visited attractions for example the following types can be distinguished:

- **Heritage tourists** – they are interested in for example castles, fortresses, archaeological sites, monuments, architecture, religious sites, the locations of historical events.

- **Creative tourists** – their favourite activities include e.g. handicrafts activities, photography, painting, cooking, language learning, i.e. they seek cultural programmes in which they can actively participate.

- **Artistic tourists** – the ones especially interested in festivals, concerts, theatre performances and locations of literature relevance.

- **Urban cultural tourists** – their primary destinations are historical cities and recognised cultural centres, they are interested, among other things, in the cultural use of industrial heritage, and also in shopping and nightlife.

- **Rural cultural tourists** – they are attracted by wine regions, wine tours, cultural landscapes, national park, eco-museums, open air museums, picturesque villages, folk traditions; the happily participate in rural tourism or agrotourism.

- **Popular cultural tourists** – attractions definitely motivating for them include theme parks, sport events, locations of film shootings and other film-related sights of interest, exhibitions on fashion and design, and shopping centres.

Another possible approach during the analysis of the demand is to look at what role cultural tourism plays in the travel decision and what depth the cultural experience reaches. On this ground five different groups of cultural tourists can be identified:

- **Conscious cultural tourists** in whose decisions a significant role is played by cultural motivations, and the personal experience of culture has a dominant attraction.

- **Consumers unexpectedly becoming cultural tourists** – who for example get information in a destination visited on a festival that grabs their attention, and the experienced lived will be definitely memorable for them.

- **Urban sightseeing tourists**, for whom culture is an important motivation but the cultural experience itself is not very deep.

- **Occasional cultural tourists** for whom culture is a motivation of medium importance and the cultural experience is also only medium deep.

- **Accidental cultural tourists** who participate in cultural programmes by chance and the impact of culture is insignificant in the travel experience as a whole.

In Europe culture is one of the major motivations of touristic mobility. Although travellers participating in cultural tourism have heterogeneous features, in general it is true that cultural tourists are relatively highly schooled, have above average discretionary income and women are represented somewhat above the average among them. As regards their age, we find both younger and older generations among them, but there is a difference between the interests of visitors at different age: elderly visitors are more interested in cultural heritage attractions, while the younger ones are more attracted by events and popular culture. The proportion of those cultural tourists whose profession is connected to the cultural sector is relatively high.

### 5. The market for cultural tourism

As we could see earlier, during the development of tourism culture appears both as an environmental factor and an attraction. The **cultural environment** mainly impacts on the **touristic motivations**; the cultural level of the countries or origin considerably influences the travel motivations of the potential tourists and thereby also the characteristics of the touristic demand in the destination. Those persons who can be considered as regular consumers of culture in their everyday lives and during their pastime activities – e.g. attend theatre performances, visit exhibitions and go to concerts – will be more likely to travel with cultural motivations and during their travels they will be more interested in cultural sites and programmes.
Because tourism provides a demand for cultural services, the two sectors play a mutually important role in each other’s lives. For example, almost 30% of the buyers of tickets at the Budapest Spring Festival are foreign tourists, which is similar to the breakdown of the visitors to the Museum of Fine Arts. The supply of cultural tourism is determined to a large extent by the general cultural richness of the destination, the development level of arts and creative industries, the recognition and appreciation of the political, economic and social role of culture, and the volume of the support of the cultural sector by the state and the non-governmental sector.

5.1. International trends affecting cultural tourism

Among the international trends impacting on the leisure time activities and touristic mobility, the following are of decisive importance on the market of cultural tourism too:

· “Rich poverty” – high discretionary income is coupled with relatively little leisure time, making tourists look for rapidly liveable, intensive experiences.

· The desire to step out of long working hours and the daily routine – visitors would like to forget their “everyday lives”, so they expect even cultural attractions to relax and entertain them.

· There is a growth in the number of “experienced tourists” who have already lived many kinds of experiences, are able to compare competing cultural programmes, establishments and destinations, so they are demanding in their tourism decisions.

· Visitors mainly look for experiences and memories; they are less attracted by objects exhibited on their own (Photo 23).

Photo 23

In the Thunderbird Park of Australia, visitors buying entry tickets get a pickax and a bucket to search for geodes hiding semi-precious stones

Foto23_Thunderbird.jpg

Photo by Rátz, Tamara 2008

· Personal, individual need and expectations are becoming more and more important for tourists; accordingly the importance of tailor-made supply is increasing.

· In connection with the experiences received, a more and more definite expectation is interactivity, the active involvement of the consumer in the – knowledge mediation and entertainment – process, especially by the utilisation of modern technology devices.

· A constant growth of the importance of hyper-reality, virtual world and virtual communities can be seen, in which the younger visitors feel comfortable. Related to this phenomenon, we can also see the attraction of devices and experiences built on simulation in cultural tourism too.

Another very important international trend impacting on the development of cultural tourism is globalisation, having an effect on, among other things, the development of the phenomenon of culture, the practice of the consumption of culture and the development of touristic demand and supply. A specific manifestation of globalisation is the creation of the UNESCO World Heritage concept, as the idea itself suggests that there is supranational universal heritage which is of outstanding importance for all communities, and that there are global criteria on the basis of which the values worth awarding the World Heritage status can be selected. Although in each country we find heritage values meaningful for the domestic visitors and important at national level, the concept of the world heritage is unique inasmuch as the World Heritage sites are universal values belonging to all peoples on Earth, irrespective of exactly what country has them in its territory. Coming from the universal character of the values admitted to the World Heritage list, countries that have joined the Convention Concerning the Protection of the World Cultural and Natural Heritage, accept, besides keeping their national sovereignty, that the protection of the locations admitted to the list is the joint responsibility and task of the international community.
In practice the picture is somewhat controversial: on the one hand, the list of sites admitted shows what the applicant countries find the most serious values of their own national heritage. There are relatively few sites which can be undoubtedly considered as the common heritage of the whole mankind: it is maybe only the natural values representing the geological or ecological development of the planet that can be put into this category, like the Grand Canyon, the Great Barrier Reef or the Galapagos Islands; or the prehistoric sites from the times before the cultural diversification of humanity started, or Ironbridge Gorge, the birthplace of industrial revolution. On the other hand, it is a very important step from the aspect of culture to recognise that heritage values remote from each other geographically and culturally have universal value for all communities, as they together make the richness of human civilisation. Openness and flexibility manifested in the acceptance of the concept of World Heritage and connected to the recognition of foreign, exotic, remote cultural values is a companion to globalisation, which has a considerable impact on the development of the market of cultural tourism.

A little bit contradictory to the global character of the idea of World Heritage is the fact that the separation of the concepts of cultural and natural heritage in the classification of the World Heritage sites is the reflection of the European philosophy from the times of the Enlightenment. Presently more than three-quarters of the sites on the list are cultural heritage, which may be the consequence of the fact that there are bigger differences in the types and characteristics of the cultures of various societies than in the natural environment of the human kind (there are “mixed” heritage sites on the list meeting both cultural and natural criteria, such as Kakadu National Park national park in Australia or the Meteora in Greece). Because the World Heritage concept is basically of material character, in certain cases – especially when it comes to non-material cultures built on oral history – this approach makes it hard to recognise the value of some locations. The Uluru-Kata Tjuta National Park in Australia for example was admitted on the list as a natural heritage in 1987, but it was re-qualified as a mixed heritage in 1994, taking into consideration that the area has been inhabited for some 30,000 years, and the natural environment had social, spiritual and symbolic significance for the Anangu aboriginals.

6. Cultural tourism in Hungary

Cultural tourism has appeared among the selected touristic products in Hungary in the last few years, because besides medical tourism this is the sector where Hungary has significant, partly still unutilised touristic resources. For the domestic propaganda of cultural tourism, in the recent past the Hungarian Tourism Inc. announced two thematic years which in some form put Hungarian cultural experiences, sites and programmes into the centre: 2009 was the Year of Cultural Tourism, while 2010 the Year of the Festivals. Summarising the findings of the campaign years we can say that the Hungarian population interprets culture and culture-related travels rather broadly, i.e. we cannot talk about conscious consumption of cultural tourism experiences, in fact, culture appears in many different forms during the inland touristic activities. The assessment of the cultural endowments of Hungary by the population is definitely positive (which is especially true for folk traditions, rural heritage, events and festivals), in addition, the judgement of the supply of cultural tourism changed positively as an effect of the thematic year. At the same time, culture is basically a supplementary motivation during the travels of the Hungarian tourists; the primary motivations are still recreation, entertainment and visiting friends and relatives.

In 2010 Pécs was the European Capital of Culture, sharing the title with Essen and Istanbul. In the city, the number of domestic guest nights during the ECC year grew by almost 13%, that of foreign guest by near 75% at commercial accommodations, making a total of 28% growth in turnover. In Baranya county in the same year, the total growth in the number of guest nights was 8.6%, which indicates that the Pécs ECC 2010 project had an impact not only on the city but also its indirect and direct neighbourhood. On the list of Hungarian settlements most popular among foreign guests, Pécs ranked No. 12 in 2010 (which was a move 10 positions forward compared to its performance in 2009) (Photo 24).

Photo 24
Széchenyi Square, Pécs
Foto24_Pecs.jpg
Photo by Rátz, Tamara 2010

6.1. The Hungarian environment of cultural tourism
The development of cultural tourism is significantly determined by the economic, political, social and technological environment in which the tourism sector operates. A factor of outstanding significance in this environment is the state support given to cultural tourism, so it is worth taking a look at the presence of this tourism product in the Hungarian tourism strategy plans. In the Hungarian National Tourism Development Strategy made for the 2005-2013 period the utilisation of culture and heritage in tourism is mentioned as a selected priority. The NTDS says that the diverse and unique culture of Hungary is one of the special values of the country that are underutilised for the time being.

The Cultural Tourism Development Strategy made in 2009 also states that Hungary has good endowments in the field of cultural tourism, but the assets of this sector are underutilised. The general Hungarian problems of cultural tourism featured in this document include, among other things, the lack of presentation that offers a real experience and the absence of complex cultural products, the complicated system of owners and operators which sets back developments and market-based marketing activity, the relatively low level of the acknowledgement of the cultural supply and the unpredictability of the financing of cultural events. Further unfavourable phenomena include the inadequate schooling level of the employees in cultural tourism and the deficient cooperations among the cultural and touristic sectors. The development priorities defined in the Cultural Tourism Development Strategy until 2015 are as follows: establishment of the organisational and operational system of cultural tourism, creation of the legal frameworks, securing the economic foundations of product development, development of attractions built on cultural values, development of the related infrastructure and provision of the human resources background.

7. Cooperation of cultural tourism with other products, synergy effects

Cultural tourism is actually related to all other tourism products, because culture manifested in the everyday life is the foundation of any human activity, including tourism product development. If we take the narrower definition of culture into consideration, the relationship is especially strong to urban tourism and medical tourism, while wine and gastronomic tourism are actually elements within cultural tourism. The particular cultural endowments can significantly influence the characteristics and thereby the competitiveness of other tourism products. For example, the built environment of a destination or legends related to the location may make other tourism activities more attractive for visitors. Although city or road running races are organised in several countries, the most special experience is to run the distance of 42,195 metres on the classic ancient road linking Marathon and Athens in Greece.

7.1. The relationship of urban tourism and cultural tourism

A worldwide trend is that cultural tourism is created dominantly in urban spaces (Photo 25). This usually is the consequence of the concentration of touristic services in towns and cities, which is partly a historical heritage: today’s towns and cities were built around fortresses and cathedrals for centuries, and these cities gradually built museums, theatres and concert halls. The geographically concentrated location of cultural events is explained by better accessibility (railway and coach stations, airports and motorways) and the higher level and larger capacity accommodation supply available.

Photo 25

Vienna is one of the most important centres of cultural tourism in Europe

Foto25_Becs_Opera.jpg

Photo by Rátz, Tamara 2006

The cities outstanding from cultural tourism aspects include capital cities and their historical centres, on the one hand: Paris, London or Berlin are all among the most significant cultural destinations in the world, for example. The second group contains cities which are not capital cities but acknowledged cultural destinations, like St. Petersburg, Krakow or Istanbul, which in certain cases may have an attraction exceeding that of the administrative capital for tourists with cultural interest. The third group is basically made by those smaller cultural centres which are recognised at regional level, mainly. Exceptions in the third category may be settlements awarded the European Capital of Culture of World Heritage rank, in which the award of the title resulted in considerable change in the number of visitors and the acknowledgement: examples for this category are Nagyszeben (Sibiu) in Romania (Photo 26) of the medieval downtown of Zamosc in Poland.
7.2. Relationship of health tourism and cultural tourism

Another worldwide trend is that habits, procedures and rituals related to the preservation of health, and also the elements of the built environment of health preservation – like spas, sanctuaries, hospitals – are closely related to the social and cultural characteristics of the respective community. The integration of health tourism and cultural tourism is thus visible in several dimensions. The comparison of the international practice of health preservation shows that during the development of the human civilisation many traditions on the same foundations but with cultural differences have evolved: for example the Turkish hamam (Photo 27), the Finnish sauna or the Japanese onsen all contain a combination of hot air and steam for the refreshment of the body and the soul. Coming from the cultural differences, however, such establishments in the respective countries – besides satisfying the recreational needs of the local inhabitants – have become partly cultural attractions for international tourism, which is well illustrated by Çemberlitaş Hamam in Istanbul, Kotiharjun Sauna in Helsinki or Oedo Onsen Monogatari in Tokyo.

8. Product development in cultural tourism

In the field of cultural tourism product development can take place at the level of individual attractions, and also at the level of larger territorial units such as cultural landscapes or historical cities. As the tasks of attraction management are discussed in detail in the study material called “Attraction and visitor management”, from now on we only focus on the latter issue.

As we could see earlier, cultural landscapes play a significant role in the development of cultural tourism. Form a touristic aspect, a specific challenge for the management of cultural landscape destinations is the fact that these areas are complex spatial units located in relatively large geographical space, with an above-average number of stakeholders and complex systems of interests. Consequently cultural landscapes, similarly to historical cities that are also significant cultural attractions, are suitable for complex tourism product development, as they can integrate practically all touristic functions that not one single attraction could integrate on its own. The Pyramids of Giza cannot accommodate or cater tourists visiting there, but the wine cellars of the Portuguese region Alto Douro that are engaged with the provision of accommodation and catering are parts of the cultural landscape, and this way vertical integration of the material conditions of cultural tourism is realised.

In cultural landscapes and historical cities the spatial distribution of touristic demand is usually much less concentrated than in the case of cultural tourism attraction located in a well designable single spot. It is key issue, however, in the relatively large geographical space to plan and manage the flow of the visitors so that as big as possible proportion of the stakeholders in the cultural landscape – both at community and business level – should enjoy the positive impacts of the increased touristic demand in a way that the negative impacts
concomitant with the increased traffic concern them at a minimum level. The optimising of traffic planning is a key issue, anyway, among other things because cultural landscapes usually involve small settlements which, as opposed to the rapidly changing urbanised world, can preserve heritage of the rural lifestyle to a certain extent. In historical cities, other urban functions must be harmonised with the cultural functions.

During the foreign development of cultural tourism, it is important to feature cultural landscapes as single destinations on the tourism market. The integration of attractions that are less popular in themselves, and their presentation in an adequate cultural and historical context can increase the demand for both the area as a whole and the constituent attractions and service providers. It must be taken into consideration, however, that one component of the attraction of cultural landscapes is usually way of life, lifestyle typical of the locality, so the development of tourism can only be seen as positive in a form and to an extent that does not endanger the preservation of the original economic and social function of the landscape and the authenticity of the heritage values.

9. The research of cultural tourism

The topic of cultural tourism is an extremely complex research field, because, as we could see in Chapter 1, both the concept of culture and the range of activities and services categorised as cultural tourism can be interpreted relatively broadly.

In cultural tourism researches, one of the most frequently studied issues is traditional demand and supply analysis, using a predominantly marketing-based approach, because cultural tourism in an economic activity, in the framework of which consumer demands must be explored, understood and satisfied in a sustainable way – i.e. with profit or at least without a deficit – on the one hand; on the other hand, the development of cultural tourism has a significant impact on the quality of life of both the participating tourists and the inhabitants of the destination. Accordingly, the aspects of social, cultural and ecological sustainability must be taken into consideration on making development decisions, so these issues also appear as research topics when studying the phenomenon of cultural tourism.

Beyond the statistical analysis of demand and supply, in the forefront of the Hungarian and international surveys we find, among other things, the complicated system of relations of culture and tourism; the impacts of the progress of tourism on the cultural features of the destination concerned; the challenges of the interpretation and representation of cultural heritage; the relationship of arts, creative industries and tourism; the development and effects of festival tourism; culture as an urban development tool; the impact of globalisation on the trends of cultural and heritage tourism; cultural tourism as an integration factor; democratisation of the cultural consumption; the role of cultural tourism in shaping individual and community identity; the appearance of multiculturality in tourism … and the list is practically endless.

Among the databases available, an especially useful one is the website of the UNESCO World Heritage Committee providing complex information of the sites on the world heritage list, the criteria of the award of the recognition the World Heritage Convention, and also giving topical news on world heritage locations and on relevant events. Several different UNESCO publications deal with the issue of the World Heritage values, including the World Heritage Review, a richly illustrated periodical released every third month in English, French and Spanish languages, or the World Heritage Paper Series launched in 2002 which discusses, at an academic level, issues related to the management, preservation and development of World Heritages.

In the topic of cultural routes as special touristic products, detailed information is provided by the European Institute of Cultural Routes on the network of cultural routes in Europe and on events and projects related to the establishment, development and propaganda of cultural routes as well as the academic research of the topic serving as the foundation of the routes.

Active researches are carried out in the field of cultural and heritage tourism by the research groups of ATLAS (European Association for Tourism and Leisure Education), especially by the tasks forces of Cultural Tourism, Religious Tourism and Pilgrimage, Gastronomy and Tourism, Tourism and Socio-Cultural Identity and Urban and Capital City Tourism. The majority of the studies and books summarising the findings of the researches can be purchased online at the webshop ATLAS.

The CCP (Cultural Contact Point) provides information on several issues related to cultural cooperations in Europe. This office is also responsible for the national coordination of the current cultural framework programme of the European Union.
Although the website of the European Travel Commission does not contain statistical data on cultural tourism per se, still statistical data available on the site on European tourism trends and forecasts are a useful source of information for the research of cultural tourism too, as cultural and heritage tourism plays a role of selected importance in the tourism industry of Europe.
Bibliography


1. Definition and historical preliminaries of active tourism

When looking for a definition of active tourism we find the following one in the Hungarian literature: “active tourism is a form of tourism where the motivation of the travel by the tourist is the pursuing of some leisure or sport activity requiring physical efforts” (Magyar Turizmus Rt., 2003). According to Michalkó, g. “active tourism is a sort of travel during which the tourist carries out intensive movement other than the usual movements that s/he makes, besides purchasing some goods or services” (Michalkó G. 2002). Following this concept and taking Michalkó’s other thoughts into consideration we give the following definition of active tourism: “...active tourism covers all those touristic activities that are realised as a pleasure-driven, non-routine movement of the tourists outside of their regular spatial tracks, together with their spending” (Michalkó G. 2002).

It is rather difficult, however, to deal with this touristic product when international literature seems to neglect the concept of active tourism, and even if it is dealt with, it is usually connected to leisure time activities. Nevertheless also in this approach active tourism is a pastime more intensive and more active than the traditional activities done by the tourists.

This way the range of active tourism typically involves hiking in nature, cycling tourism, water tourism, horse riding, golf, angling and hunting, and also other leisure time sport activities that include for example adventure tourism and extreme tourism, to name but a few new trends. The problematic nature of the definition of the concept comes, among other things, from the fact that active tourism naturally shows many similarities to sports tourism, which may be divided into two branches in this respect: amateur and professional sports tourism; they both have touristic content. The predominantly active tourism products and the related activities in the Hungarian and international literature are listed in Table 1.

Table 1: Active tourism products

<table>
<thead>
<tr>
<th>Product</th>
<th>Activities</th>
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<tbody>
<tr>
<td>Hiking in nature</td>
<td>Excursions Visit to national parks and other protected areas Walking tour Nordic Walking Achievements Mountain climbing Speleology</td>
</tr>
<tr>
<td>Cycling tourism</td>
<td>Individual cycling tour Group cycling tour Mountain cycling Bicycle race Achievements</td>
</tr>
<tr>
<td>Water tourism</td>
<td><strong>Summer:</strong> Kayak and canoe tour Rowing Ship excursions Water skiing Yacht tour Sailing Jet-ski Kite (summer) <strong>Winter:</strong> Skating on “Fakutya” (traditional ice-skate-like vehicle used on Lake Balaton) Skating Kite (winter)</td>
</tr>
<tr>
<td>Equestrian tourism</td>
<td>Horse riding tour Equestrian camp Draught carriage tours Equestrian training Medical horse riding</td>
</tr>
<tr>
<td>Golf tourism</td>
<td>Golf (leisure time) Golf teaching</td>
</tr>
<tr>
<td>Angling tourism</td>
<td>Angling on lakes (still water) Angling on rivers Angling on seas and oceans – open sea angling</td>
</tr>
<tr>
<td>Hunting tourism</td>
<td>Hunting</td>
</tr>
<tr>
<td>Ski tourism</td>
<td>Skiing Snowboarding Other new ski-related sports</td>
</tr>
<tr>
<td>Other active tourism types: leisure time sport activities</td>
<td>Motorsports (motorcycle track racing, enduro, quad, motocross) Motorcycling Cliff climbing Ice wall climbing Rafting Parachuting Different sorts of archery</td>
</tr>
</tbody>
</table>
We have to say a few words about adventure tourism and extreme tourism as well. In our interpretation these new active tourism products and leisure time activities are travel and pastime activities which are different from the conventional activity, are more demanding and “adventurous”, and which offer new exciting and “adrenalin-packed” experiences that cannot be achieved by the traditional forms of tourism (Csapó J. 2010). Extreme tourism is not always the same as extreme sports.

We have already mentioned that international tourism literature does not use the term ‘active tourism’ or uses it with different content, still there is a non-for-profit organisation that does use and even define the term active tourism. The Mexico-based Active-Tourism Organisation is a non-for-profit organisation that supports responsible and active tourism travels within organised frameworks, including e.g. a worldwide red list of service providers not meeting the requirements of active tourism – although they considered themselves as suitable service provider –; their website, where the expression “Active Tourism” is a legally protected registered trademark (see at (http://www.active-tourism.com)) includes relatively sophisticated materials on the definition and the relations system etc. of this concept.

In their approach active tourism is “a responsible way of travelling that requires physical and mental participation of the tourist, taking the criteria of sustainability, the protection of biodiversity and the preservation of culture into serious consideration. Important elements of the tourism product are recreation and education, respect and observation, and the active participation of a local expert – professional tour guide – in the given travel” (http://www.active-tourism.com/HomeFramesOrg.html). They also emphasise that active tourism has 3 main purposes: recreation, education and learning, and profit realised at the local level. Although this approach is slightly different from the one applied by the Hungarian experts, the strengthening of the focus on sustainability and active participation by the inclusion of the local experts and inhabitants is definitely welcome. This organisation handles the concept of ecotourism differently – like we do in our definition – but remarks that there are considerable overlaps among the tourism products.

In our interpretation the concept of active tourism excludes health tourism, ecotourism, tourism of theme tours and theme parks, despite the fact that they evidently have motivations or forms that inspire the tourist to have an “active” recreation. Accordingly, the “aquapark” of a thermal or medicinal spa, its entertainment facilities, ecotours and theme tours, or cycling and hiking available within the framework of rural tourism evidently have overlaps with the concept of active tourism, but our book deals with these products separately, primarily due to the marked differences. This issue is dealt with in more depth in chapter 2.

When examining the historical development of active tourism we can say that it is a relatively new phenomenon within the tourism industry, accordingly this tourism product appeared in the second half of 20th century. This was the time when, as a consequence of the urbanisation processes created by the former industrial revolution, the “everyday” people did not necessarily have any longer the previously general and almost natural good physical condition, so there was a growing demand for movement and pursuing a more active lifestyle. Getting away from the urban zones at that time was provided by the parks and the suburban leisure time zones, but the first forms of active tourism in the modern sense of the word showed up in the beginning of 20th century, in the form of alpine ski tourism. Later on these active tourism activities penetrated to the protected areas, national parks and also to other fields suitable for practicing an active lifestyle.

The rapid development of this tourism product, however, was promoted by the strengthening of the desire to get away from modern mass tourism, and its heyday is definitely in our time. Hiking, walking in nature, cycling and other leisure time activities are becoming part of the ordinary people’s lives too, changing these days many things from clothing through foods, considerably changing the way of life and the attitude to life of the active tourist.

We have to add that when looking at the history of these leisure time sports we find that these activities have been/are more and more moving towards extremities, even simple cycling has at least ten versions by now and bicycle itself is chosen by function (trekking, downhill, urban etc.) and not “only” driven by the desire to “cycle”. This is of course true for the other forms of tourism as well.
At the end of the theoretical approach to active tourism we would like to mention that in our opinion it is sad that the most important periodical of the Hungarian tourism industry, Turizmus Bulletin (Tourism Bulletin) – despite the fact that the Magyar Turizmus Zrt. (Hungarian Tourism Inc.) declared the year 2011 the year of active tourism – only contains a very few studies or articles on active tourism, and the function ‘search’ finds no matches at all for active tourism product. Of course we find articles and topics with overlaps, although not in large numbers, in the Turizmus Bulletin.

The need for the understanding of this tourism product and its research on scientific grounds is justified primarily by the conference that was initiated by the Faculty of Physical Education and Sports Studies of the Semmelweis University on a symposium in 2007 called “The situation and development of active tourism in Hungary”. The topic has a large number of publications in the periodical called Sporttudományi Szemle (Journal of Sports Studies), with the primary focus on sports tourism of course.

2. Elements of the supply of active tourism

2.1. Attraction(s)

The attractivity of active tourism can be divided – similarly to the general analysis of tourism sector as a whole – into natural and manmade attractions, bearing in mind that the role of natural attractions is far more important than that of the second category. Accordingly, the typical fields of scenes of active tourism are primarily (high) mountains, natural rivers and still waters, and all other elements of the natural environment that are good for pursuing tourism activities involving active movement.

Man-made attractions can be climbing walls, ropeway, zorb balls (rolling balls), summer bob sledge tracks, summer ski tracks (with artificial grass) and bicycle routes. The list is endless by the invention of ever newer leisure sports.

We have to remark that a very important actor is the geographical distance and the accessibility of the given tourism attraction, and another factor of vital importance is the proximity of the given area to an established tourism attraction or destination: in the vicinity of popular tourism resorts active tourism can offer good auxiliary programmes or activities, allowing both spatial centralisation or decentralisation of tourism.

2.2. Tourism infrastructure

In order to have active tourism, a given tourism area of course must have adequate conditions. When examining the reception capacity, we have to check if a destination has attractions in adequate quantity and quality, as well as the tourism infrastructure and suprastructure promoting these attractions.

As it is also remarked in the Hungarian National Tourism Development Strategy (NTDS), in general we can say that the conditions of reception for active tourism are not adequate yet in Hungary, the connected services are deficient; they are not adequately built out. We also have to remark, however, that these days, following the international tourism trends and the growing health consciousness of the populations, a growing number of entrepreneurs or municipalities invest in active tourism: examples are the extreme sports parks in Hungary (Messextrém Park in Pécs, Visegrád Bob Sledge Track), motorsport-related tracks (Hungaroring, Kakucsring, go-kart tracks, motocross tracks), or the more and more frequent bicycle route programmes or constructions (construction of the Pécs-Orfű bicycle route, Three Rivers Bicycle Route).

It is evident that more bicycle routes must be built for cycling tourism, which, besides providing the infrastructure background of the tourism sector, could integrate Hungary to the international networks of bicycle routes, also strengthening the cross-border relations and cooperations. In addition, the building out of adequate services and road maintenance systems is also necessary.

Hiking in nature does not have a major requirement for infrastructure, but the placement of information signs on the forest trails and alleys, the placement of benches or the establishment of forest sports fields would further increase the attractivity of this product.

As regards water tourism, the NTDS document also remarks that we have to improve the quality of sailing tourism on the Hungarian lakes, by the provision of ports with advanced infrastructure, and of services. The development of the infrastructure of another important branch of water tourism, river tourism must target the improvement of the conditions of motor and paddle sports.
The infrastructure conditions of Hungarian golf tourism are good in the existing golf clubs, but they do not have international recognition yet.

The most important development document for equestrian tourism is the Product Development Strategy of Equestrian Tourism for 2007–2013, approved in 2009. The document gives a detailed analysis of the positions and opportunities of this tourism product in Hungary, including the state of infrastructure, and also makes recommendations for developments, at regional level.

### 2.3. Tourism suprastructure

As regards the positions of the primary tourism suprastructure of active tourism – i.e. commercial accommodations and catering facilities –, we can definitely say that their qualitative development for active tourism leaves much to be desired. In order to reach the international level, we should have a massive stock of commercial accommodations to use the endowments that we possess. This is also true for the secondary tourism suprastructure, although it is true that active tourism more and more frequently appears in the marketing and promotion of any geographical unit, or in the offer of travel agencies. The biggest deficiency might be seen in information offices and the flow of information, the only solution for which, for the time being, seems to be (the users of) internet.

### 3. Characteristics of the demand of active tourism

#### 3.1. Tourists’ motivations, socio-cultural background, touristic behaviour, the weight within travel habits

The main motivation factor of active tourism, in addition to the motivations generally present in tourism, is the physical and psychical motivations of tourists which spur them to pass their leisure time by some active recreation. It is of course associated with the – relatively new – honourable social need for a more and more healthy way of living, in order to avoid or counterbalance the everyday stress.

An important motivation factor or attraction is of course natural environment itself, as this form of tourism is basically an “outdoor” activity. The foundation of the system is obviously movement and activity, while motivations of almost the same significance include, besides being in nature, adventures or adventure-like experiences. A third factor of the motivation system in our opinion is the presence of manmade attractions – which may be available both in “indoor” and “outdoor” forms.

**Figure 1:** Motivations of active tourism

![Motivations of active tourism](image)

Ed.: Csapó, J. 2010

When discussing active tourism in Hungary, we must not neglect the surveys made by Sonda Ipsos in 2000 and the Hungarian Tourism Inc. in 2005. The former was published in the periodical named Turizmus Bulletin.
(Tourism Bulletin) in an article called “Opinion of the adult population on the active holidaymaking and cultural activities”, the latter in another article in the same periodical, by Vizi, I. (2005) under the heading “Preferences of the Hungarian population for active tourism, and the intensity of active tourism forms”. The two surveys provide an interesting basis for analysis, also due to the time span between them, as such a long duration allows the detection of potential changes at the consumers and in their habits.

The 2005 survey revealed that respondents were primarily interested in hiking in nature, excursions, bicycle tours and water sports, although we have to remark that the evaluation method applied during the research operated with a 1 to 5 scale and the average score of the responses just passed 3, which marks a relatively neutral preference. The research thus made it clear that respondents are not particularly motivated by active recreation, as golf and hunting were more often rejected than seen as neutral.

There were demonstrable differences between the sexes as regards the responses: women are more interested in horse riding, bicycle tours and hiking, whereas men showed a somewhat higher preference for golf, angling, hunting and skiing.

The very low level of interest in active tourism is also demonstrated by Table 2 showing the travel motivations of foreign and domestic tourists in Hungary. Among the motivations analysed, city sightseeing and camping may be taken as active tourism, and it seems that the “remaining” motivations can be detected in only 3.7% of other tourism activities.

<table>
<thead>
<tr>
<th>Table 2: Motivations of foreign and domestic tourists</th>
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<tr>
<td>Holiday, recreation</td>
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<td>City sightseeing</td>
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<td>Health tourism</td>
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<td>Events tourism</td>
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<td>School study tour, camp</td>
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<td>Visiting relatives</td>
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<td>Shopping</td>
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<tr>
<td>Business tourism</td>
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<tr>
<td>Other tourism activities</td>
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<tr>
<td>Non-tourism activities</td>
</tr>
</tbody>
</table>

Source: Magyar Turizmus Zrt. 2006, HCSO

From marketing aspects, the target groups of active tourism in Hungary are as follows:

1. **Hiking in nature**: all social layers, but most typically those aged 40-49, with secondary and tertiary education.

2. **Cycling tourism**: all social layers, mostly those under 50, diploma holders and village dwellers.

3. **Water tourism**: young, aged 40-49, males, with secondary and tertiary education, mostly from the capital city.

**4. Operation of the market of active tourism products, trends**

**4.1. An international outlook**

From the 20th century on, parallel to the growing popularity of active tourism, spaces to be explored expanded; the zone of seeking active tourism adventures now practically covers the whole of Planet Earth. The field of international active tourism is now not so much the interesting of beautiful elements of the natural environment, it is much more the extreme elements that are sought: desert tours, extreme mountain climbing, extreme mountain sports, areas around or beyond the polar circle, and deep sea zones.
If we want to look at the spatial concentration of active tourism in an international outlook, we find difficulty in selecting major countries or destinations, because, as we have already mentioned, any point of the planet may be a suitable area for pursuing active tourism. Still there are a few countries where physical exercises and the related active tourism activities have been part of the everyday life for a longer time, on the one hand, and the natural environment is excellent for servicing the active tourism products, on the other hand.

In Europe these countries are the Alpine countries (but not only because of the Alps): Austria, Switzerland, Slovenia, Italy, France, Germany, the Scandinavian countries, the British Isles; in America it is mainly the United States where active tourism has a significant proportion within tourism activities, and also has traditions.

4.2. Active tourism in Hungary

One of the most significant areas of active tourism in Hungary is equestrian tourism, because horse riding has ancient traditions in Hungary. A number of places are available for dressage riding, horse jumping and field riding; also, there are many equestrian schools and equestrian facilities. Since 2000 a qualification system for equestrian tourism has been operated by the Hungarian Equestrian Tourism Association. A total of 375 facilities have been qualified so far, from which more than 170 have received a qualification ranging from 1 to 5 ‘horse shoes’.

**Figure 2**: Major equestrian and hiking trails of Hungary

*Source*: Aubert, A. 2007

*Water tourism* is another major branch of active tourism in Hungary. Hungary has an extended system of rivers and still waters, approximately 3,500 kilometres of waterways serve the needs of tourists, but infrastructure is not adequately built out in the environment of those lakes and rivers which are otherwise suitable for water tourism. Water tourism is usually pursued by those tourists who are most fond of unspoilt nature. We can see a development in this field too in recent years, as many settlements have well-equipped water tourism facilities by now.

When looking at water sports, we must not neglect those water sports and active tourism forms for which winter is suitable, because no matter how evident the summer seasonal character of water tourism we think to be, waters are relatively frequently visited in wintertime too. Such active winter tourism types are skating, ice hockey, curling and “Fakutya” skating (typical on Lake Balaton mostly), as well as ice surfing and kitewing.

**Figure 3**: Major ports and angling facilities of Hungary

*Source*: Aubert, A. 2007

*Golf* as a sport and leisure time activity is also part of active tourism, and has more than 15 years of tradition in Hungary. The Hungarian golf competition courses have been created in accordance with the international standards, so they are suitable for the organisation of international competitions. Hungary has 14 golf clubs, e.g. in Kisoroszi, Hencse (Hencse National Golf & Country Club), Máriavölggy, Szentlőrinc, Pécs, Alcsútőduboz, Tata, and Bük. These include 6, 9 and 18 hole courses, courses in hilly and mountainous areas and also in wetlands.

A form of tourism also popular in Hungary is hiking in nature, the most visited areas are the hiking trails in the national parks, but walking is also important. Hungary has a total of 11,000 kilometres of designated hiking paths, of which 2,500 kilometres are of national significance. These hiking paths make a national blue circle (Hungarian Blue Hiking Trail). The national hiking paths of Hungary are integrated by the European society of hikers into the long haul hiking trails of Europe (E3, E4, E7).

The main motivation of hunting tourism is the observation of the game, its killing, its respect and protection. The main fields of hunting tourism in Hungary are the mountains and hilly areas, but the Great Hungarian Plain is also suitable for hunting tourism activities. Most popular hunting resorts are the Somogy Hills, the Zala Hills, Gemenc, Bakony, Danube Bend, Mátra and Bükk.

In the case of hiking, the interest in the activity goes together with actually doing it; this is followed by cycling tourism. The opportunities of water sports are relatively limited in Hungary, they are seasonal, and this is the reason why only 15% of those interested in water tourism actually pursue water tourism activities. As regards horse riding and golf, the regular or occasional pursuing of the activity is limited by the costs incurred. The
income positions of the inhabitants allow hiking in the first place, both in the case of foreign and domestic trips. A major difference between the domestic and foreign destinations can be seen in the choice of water sport fans. Because the waters of Hungary are less suitable for certain water sport activities, the demand for seaside resorts has significantly increased, as opposed to the domestic destinations.

The basic destinations of active tourism in Hungary are featured in the map below. It is clear that Hungarian active tourism (too) is basically connected to mountain areas and bathing complexes (aquaparks).

**Figure 4**: Active tourism in Hungary

*Source: Aubert A. (2007)*

5. Environmental conditions of the operation of the market

No comprehensive strategy has been made on active tourism by the tourism policymakers, but strategies for some areas have been written: cycling tourism and ecotourism (hiking). The Hungarian National Ecotourism Development Strategy says that authors are unhappy (because of the specific needs of ecotourism) about the fact that in the case of some ecotourism products, in calls for tenders “ecotourism has been treated together with active tourism in several cases” (ÖFS 2008). Nevertheless there is a need for the reconsideration of a comprehensive active tourism, and for the assessment and analysis of development possibilities.

The Hungarian National Tourism Development Strategy (NTDS) mentions as an example the marketing and tourism strategy of Austria, where active tourism is treated as a selected tourism product (it is true though that hiking and ski tourism has longer traditions in Austria).

The tourism development strategy considers active tourism as a selected tourism product for the young, when discussing youth tourism. By order of importance, “the form of active tourism which is most popular is hiking in nature, followed by cycling, water tourism and horse riding” (NTS 2010). The most popular active tourism pastime of the youth, according to the strategy, is visiting national parks and participation in walking tours and more spontaneous bicycle tours, but horse riding tours and equestrian camps are also very much interesting for the young.

When introducing the elements of supply and the macro-regions of tourism, the SWOT analysis of the strategy considers active tourism related to the rivers and lakes as an opportunity. One of the weaknesses mentioned by the strategy in this respect is the scarcity of accommodations in the vicinity of the attractions, the inadequate conditions of the reception of tourists and the deficient related services. “In accordance with the demand of the market, it is necessary to change the supply towards a higher quality category. In addition to the improvement of the quality, the range of services should also be expanded.” (NTS 2010)

The development strategy devotes a separate sub-chapter – in the chapter on traditions and manmade attractions – to equestrian tourism as an outstanding activity among the traditional attractions of Hungary. The problems listed include the lack of skills necessary to pursue equestrian tourism services, the low number of equestrian trainers, the deficient language skills and the inadequate stock of horses. “The level of horse riding culture is low (despite the positive image of this living in foreigners), and the designated riding trails are also missing.” (NTS 2010)

The tourism development strategy summarises the things to be done in connection with the respective tourism products as follows:

– In cycling tourism the connections to the international bicycle route networks must be created, while at the bicycle roads already built the adequate level of services and maintenance of the roads must be achieved.

– As regards hiking in nature, the strategy mentions the development of water tourism and cycling tourism, urging them to cooperate with the non-for-profit and non-governmental organisations involved in hiking. The strategy also calls in the field of youth tourism for the implementation of good service supply and information services.

– In the field of water tourism, the document says it is important to improve the quality of sailing tourism on the lakes of Hungary, by the provision of adequate ports and services. In order to increase the traffic on water, the
Danube River must be made more easily navigable, and more attention must be paid at the rivers of Hungary to the creation of the conditions of motor boat and paddle tourism.

- Golf tourism should primarily be developed by private capital, the objective of the strategy is the minimisation of the environmental stress, and it also states that the number of golf courses should only be increased within reasonable limits.

In the National Regional Development Concept of Hungary, the development of active tourism is recommended for the alleviation of the serious handicaps of the Great Plain areas dominated by scattered farms. The concept also mentions the creation of the conditions of tourism to rural areas and of active tourism, and the harmonisation of the development possibilities.

In the youth tourism development programme, the segment of young travellers is associated with active tourism in the first place. According to the development programme, sport programmes and active tourism supply play an important role in the development of the youth. The programme says it is the youth that is the “best” generation on the basis of their health conditions to pursue active tourism activities.

5.1. Features of the environmental elements

As regards the features of the elements of the environment, we can say that active tourism (as a tourism product) is built on the characteristics of the natural environment in the first place. Hungary boasts of a large number of active tourism products competitive on the international market. The versatility of the contents of tourism products and an effective marketing activity are the tools that will make active tourists visit Hungary for a longer stay.

**Figure 5:** Relationship of rest, recreation and tourism


Among the attractions, the rivers of Hungary are outstanding natural values, as they are suitable for water tours, while the Hungarian lakes are good for surfing, sailing and angling, making waters attractive for the specific target groups. The caves offer a special kind of tours, including cave tours in overalls and the visit of natural values, unique in the world, like the hydrothermal karst caves of the Buda Mountains or the Aggtelek karst cave (the latter is part of the world heritage).

A significant part of the international youth tourism is attracted by the destinations considered as “active tourism paradises”, the visit to which is an adventure in itself. Unfortunately, the main countries of origin no longer associate the image of “adventurous country” to Hungary, while the neighbouring Austria does its best to build up the “active tourism paradise” image. In a borderless Europe it is irrational that the neighbouring province of Burgenland wishes to become the cycling tourism centre of the Union and the adjacent Hungarian region of West Transdanubia does not follow the example. A large number of examples could be mentioned for many active tourism products where the Austrians use the opportunities and the same products are not even recognised on the other side of the “border” (active tourism in the mountains, along the Dráva and Mura Rivers etc.).

In the hilly and mountainous areas of Hungary hiking has a lot of possibilities, but this activity is usually only good for the attraction of the domestic youth, mostly in the form of one-day excursions. As an auxiliary product, rock climbing has a potential. A much larger interest is shown for some technical sports (e.g. mountain biking, off-road tours, quad tours, gliding etc.). The major part of the areas suitable for this activity is managed by the national parks, and they do not support (in fact, they prohibit) developments, because of its nature degrading impact. This makes it important to designate areas where – with certain limitations – such activities can be freely pursued.

The openness of mountainous environment to tourism has been evident for long; the development of tourism in mountains was based on the utilisation of different resources. The special natural areas with valuable landscape or ecology are not necessarily mountains. It is true though that mountains have traditionally been the least ruined medium, coming from their special features where the constituents of the physical environment appear in their most extreme forms (special climate, steep elevation, dense vegetation etc.). The number of those mountainous areas that abound in tourism products built on the exploitation of the above-mentioned resources is very low, and the majority of these can be found in the advanced countries, or they are “relatively nearby” mountains, usually on different development levels from the aspect of tourism. It is generally accepted by now that mountain tourism products can by and large be divided into the following groups:
– snow tourism (Alpine and northern skiing, and the versions of snowboard that have become popular recently);
– green tourism (including nature parks in the mountains and the visit to national parks);
– tourism related to mountain waters (lakes, rivers, reservoirs and medical health spas) such as whitewater rafting, angling, balneology; tourism based on historical-arts-cultural resources and traditions of the mountains; and adventure tourism.

**Figure 6:** Major scenes of adventure tourism, especially mountains

![Diagram of active tourism destinations](image)

*Source: Hudson (2003)*

Among the characteristics of the economic environment we have to mention that among all tourism products, the largest investments in relation to incomes were realised in extreme sports, equestrian tourism, water tourism and cycling tourism. As these are the tourism activities generating the largest incomes in Hungary, they will have to enjoy priority in future developments (in the active tourism strategy to be made).

As regards the special features of the social environment, this tourism product is the best for active movement and a healthy way of living. In the field of health indices (life expectancy, heart and vascular diseases etc.) Hungary has always had one of the worst positions in the European Union (and also at international level) – many health problems could be prevented by the development of active tourism as the marketing of active tourism as a way of life.

As regards technological environment, the accessibility of the arenas of active tourism could be improved by the expansion and more flexible organisation of travel services. The National Tourism Development Strategy also mentioned the scarcity of accommodations near the attractions, the low level of reception conditions, the deficiencies of the related services; infrastructure must be developed in some way. The improvement of accessibility could be greatly promoted by the establishment of new vehicle parking facilities, if necessary, transfer buses or other transport means could operate between the parking places and the scenes of active tourism.

### 6. Cooperation with other products, synergy effects

The development of active tourism has an improving judgement within tourism development in the recent years, because the health conditions of the Hungarian society has reached the critical level. The appearance of active tourists and the development of this tourism product would lead to a bigger attraction of Hungary, thus it would also promote more backward regions and rural development.
Active tourism has a basic system of relations to rural tourism, youth, health and sports tourism, provided that sport tourism pursued by professional sportsmen are excluded from the tourism products of active tourism.

Looking at the respective tourism products individually, however, there may be cooperations and synergy effects with other products:

– In the first place we can say that equestrian tourism is one of the most infrastructure active tourism products of Hungary, which maintains considerable relations to event tourism, besides sport tourism and rural tourism. Products of outstanding significance are the horsemen shows (“Puszta Five” or “Puszta Ten” shows, equestrian shows reminding of the conquering Hungarian tribes etc.), and the annually organised National Gallop.

– In cycling tourism, attraction is the landscape itself, together with the infrastructure: bicycle roads, built-out resting places and photograph spots. Of course most links can be found here again to rural tourism and sport tourism, but the significance of urban tourism is much larger (in many places cycling tourism has already become part of the urban tourism), together with cultural and heritage tourism (bicycle roads touch and also connect the elements of the attraction of the tourism product) and youth tourism (which has preference for using this means of transportation).

– Natural tourism as part of hiking in nature involves all those tourists who are motivated to travel by the natural environment. Natural tourism means hiking, excursions, mountain climbing, observation of the fauna and flora, nature photography, angling, fishing, sailing, ski running and the visits to national parks, and also ecotourism. Especially for youth tourism (and for youth as a selected target group) it is necessary to have an adequate supply of programmes and information services. In hiking in nature, its relation to health tourism and event tourism may lead to a synergy effect.

– Water tourism is usually mentioned together with the following types of tourism: youth tourism, because most of the participants are in the school age; sport tourism, because this in an active form of leisure time recreation; and rural tourism, because it is usually done at rural settlements (or smaller towns).

– Golf tourism has most of its relations to health tourism, within that to wellness tourism. Separate wellness hotels are built for the participants of golf tourism. A similar parallel can be drawn in Western Europe between ski tourism and wellness tourism – unfortunately ski tourism is not a selected product within active tourism product in Hungary.

– In the category “other”, Gábor Michalkó put extreme sports. Extreme sports (bungee jumping, trekking, rafting, mountain biking, outdoor etc.) can be done in many places in Hungary, but this product is concentrated in adventure parks, so it cooperates (among other things) with the theme park sector.

Figure 7: A broader approach to active tourism
7. Product development, the practice of product development

The Regional Tourism Development Strategies (2007-2013) feature, almost without exception, active tourism in their sub-programmes as an area to be developed. Within active tourism concrete tourism products are mentioned (Table 3), on the basis of the natural conditions available and their further development potentials.

Table 3: Development directions in active tourism

<table>
<thead>
<tr>
<th></th>
<th>Balaton – Central Hungary</th>
<th>North Hungary</th>
<th>North Great Plain</th>
<th>South Great Plain</th>
<th>South Transdanubia</th>
<th>Middle Transdanubia</th>
<th>West Transdanubia</th>
<th>Tisza-Lake</th>
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<td>Water tourism</td>
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Because physical activities related to active tourism can be defined as tourism products in their own right and also as a set of services, the development of this sector depends on many factors. These are: a detailed analysis of the environment; mapping of the potential target markets; assessment of consumer preferences, the supply conditions and the competition; the substituting or complementary character of the product; the demand for infrastructure development and resources; and the impact on the environment, the quality of life of the local inhabitants and the guests, and on the number of guests, duration of stay and tourism revenues.

7.1. Active tourism products selected by the regions

7.1.1. Lake Balaton

The development of active tourism in the Lake Balaton region aims at the expansion of the season and the attraction of a new, more solvent demand. In the field of water tourism, the development of sailing may take place by the extension of the existing yacht ports and the creation of new ones. The objective of angling tourism development is the creation of the conditions of boat angling by the modernisation of the boat ports, which entails the improvement of the environmental culture and the raising level of quality of the angling tourism related services. Equestrian tourism as an independent product of the Lake Balaton region set as its primary goal the expansion of the existing horse riding trails and the training of experts. The construction of the full bicycle road around the lake and the expansion of the related tourism services aim at the improvement of the conditions of cycling tourism.

7.1.2. Budapest – Central Hungary

As an effect of the programme packages defined in 2006 in order to remedy deficiencies, the expansion of active tourism on the basis of segment-specific criteria was set as an objective. On the basis of the duration of stay of the guests arriving at the region and their favourite activities, the strategy aimed at the creation of so-called “experience chains” and the organisations regulating the operation of these. Water and equestrian tourism were featured as parts of this chain of experiences, while cycling tourism was seen as a separate element, whose infrastructure background is in need of development. In case of their improvement they expand the possibilities of the Budapest citizens and the business travellers.

7.1.3. North Hungary

The competitiveness of the region is greatly influenced by the availability and accessibility of the respective touristic points. The obsolete infrastructure facilities related to active tourism and the low level of the related service network necessitate the development of the selected locations and the creation of the logistics hubs of these products (cycling, water, ski and equestrian tourism). The strategy of the region attributes a special significance to hunting tourism, which is meant to extend with its high quality services the already existing range of experienced guests. The new programmes would attract interested guests who have not been to the region before.

7.1.4. North Great Plain

The natural endowments of the region place the emphasis on the development of water tourism and cycling tourism. The section of the EuroVelo international bicycle route along the Tisza River is more of a factor decreasing competitiveness, due to the complete lack of services. Besides the improvement of the quality of services related to hunting and equestrian tourism, the strategy mentions golf tourism as an opportunity.

7.1.5. South Great Plain
According to the strategy, the active tourism related products of the region will be created by the integration of the bicycle roads to the international network, the harmonisation of hiking with other tourism products, the expansion of the services of water tourism and the establishment of golf tourism. The development of the preferred products in a coherent system aims at the creation of specific attractions for the region.

7.1.6. South Transdanubia

During the development of the recreational destinations available, the strategy puts those products in the foreground which serve the strengthening of economic efficiency and regional cohesion. Besides the measures for the improvement of the existing products, in the field of active tourism special attention is paid by the strategy to the better utilisation of the favourable endowments of water tourism, the development of the skilled human resources training of equestrian tourism, the further expansion of the range of participants in hunting tourism (of special importance in the region), the qualitative development of the conditions of angling tourism and the increase of the number of service providers related to cycling tourism.

7.1.7. Middle Transdanubia

Active tourism product development built on the natural endowments, defined as an objective, will be implemented by the infrastructure development of the environment of the existing hiking paths and the creation of possibilities for several generations.

7.1.8. West Transdanubia

The development of active tourism supply harmonically matching the endowments of the region is meant for the increase of the natural values based attraction of the region. Among the selected supply elements, in the first place we find the improvement of the conditions of cycling tourism, realised according to the strategy by the establishment of a network of ecotourism paths and the connection to the international paths. Water tourism is mentioned in connection with the development of the reception capacity and the creation of a logistics and information system. The development of the further products mentioned above will be realised by the establishments related to the given elements of supply, and the creation and expansion of services.

7.1.9. Tisza Lake

One of the most important sectors of tourism in the Tisza Lake region is water tourism, which aims at the establishment of more organised tours and port facilities. A product of selected importance in the region is angling tourism, which can only lengthen tourism season if the accessibility of the region is improved and the stock of fish is grown (offering better catches). In addition to the above-mentioned tourism attractions, products to be developed include equestrian tourism (the task is the creation of complex programme packages), hunting tourism (where the stock of game should be improved) and cycling tourism (where the task the establishment of new tracks and services).

Active tourism is a rather versatile branch of tourism. After analysing the products one by one we can say that the general goal in the development and expansion of the tourism activities selected by the region is to fit the given product, both on its own and as an auxiliary factor, into the national (and of course also the regional) supply of tourism. However, the elaboration of complex service packages can only be achieved in cooperation with the stakeholders of other tourism branches, coming from the differences of the characteristics and needs of the respective products.

7.2. Active tourism developments

The most important factor for the development of active tourism, in addition to the available financing conditions, is to make the economic advantages coming from the developments meet market demands and the elements of the Hungarian tourism policy (Parliament, Sports and Tourism Committee of the Parliament, Hungarian National Tourist Office, National Tourism Committee, Hungarian Tourism Inc., Regional Tourism Committees, professional organisations), besides the priority of environmental aspects.

According to the publication of the Hungarian Central Statistical Office, 88% of foreign tourists spending several days in Hungary use preventive and recreational services.

On the basis of the marketing plan of 2010, the following active tourism facilities are at the disposal of the guests arriving at Hungary:
• seven 18-hole golf courses, surrounded by a high level supply of services;
• 1,500 kilometres of designated bicycle roads with road signs, suitable for tourism purposes, and another 2,500 kilometres of bicycle routes, including lower rank side-roads;
• Bicycle map of the Hungarian Tourism Inc., released in 2010 with upgraded content
• 3,000-4,000 registered horses involved in active tourism;
• a growing number of guest hunters;
130,000 hectares of natural waters, supplemented by lakes managed by angling clubs, with a stocking of 4,137 tons in 2008.

8. Research characteristics related to the active tourism product, recommended databases

The efforts to organise the above-mentioned, isolated active tourism products into a complex package can also be seen in the databases of active tourism. In previous editions of the periodical called Tourism Bulletin, the respective elements of supply were published with qualitative data (e.g. tables 4 and 5), but the renewed National Tourism Database of the Hungarian Tourism Inc., launched in 2008, now aims at the more complex featuring of the elements of supply.

The establishment of a regularly updated database containing fresh information would not only be good for meeting the growing demand for active recreation but could also serve as reference for researches and for the elaboration of development programmes in active tourism.

Table 4: Attitudes related to hiking in nature

<table>
<thead>
<tr>
<th>Values (on five-grade scale)</th>
<th>Places known</th>
<th>New places</th>
<th>Environment of the place of residence</th>
<th>Large distance</th>
<th>Mountain tour</th>
<th>Satisfaction (tourist signs)</th>
<th>Relation to other programme</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.98</td>
<td>3.75</td>
<td>3.21</td>
<td>2.79</td>
<td>3.79</td>
<td>3.21</td>
<td>2.98</td>
<td></td>
</tr>
</tbody>
</table>

Source: Hungarian Tourism Inc. Attitudes of the Hungarian population related to hiking in nature, 2006. Edited by the selection of a few data of the study (Savella, O. 2010)

Table 5: Attitudes related to equestrian tourism

<table>
<thead>
<tr>
<th>Values (%): Has already ridden</th>
<th>Frequency: Regularly</th>
<th>Occasional rider</th>
<th>Every half year</th>
<th>Has never ridden Reasons</th>
<th>Lack of interest</th>
<th>Financial reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>31.7</td>
<td>4.2</td>
<td>11.4</td>
<td>4.3</td>
<td>68.3</td>
<td>44.6</td>
<td>19.8</td>
</tr>
</tbody>
</table>

Source: Hungarian Tourism Inc. Attitudes of the Hungarian population related to equestrian tourism, 2006. Edited by the selection of a few data of the study (Savella, O. 2010)
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7. fejezet - Pál Horváth: Ecotourism

1. The concept and history of ecotourism

The clarification of the concept of ecotourism in the professional literature has not been done yet. The very concept of ecotourism itself is debated, i.e. whether it should be seen as a tourism product or as a basic principle to be followed.

According to the definition of Ecoclub (http://www.ecoclub.com), ecotourism means an ecological tourism, it is a process meant to change the whole of tourism. Ecotourism in this approach is the ideal state of tourism to be reached, which minimises its own environmental impacts, establishes a financial fund for the protection of the environment, this financial fund supports equality and decreases poverty in local communities by the assistance of projects, also, it increases environmental and cultural knowledge, mutual understanding of cultures. Also, it is accessible and open to all.

Hungary accepted during the development of ecotourism the definition by the IUCN, the International Union for the Conservation of Nature and Natural Resources. In this view “ecotourism is environmentally responsible travel to natural areas, in order to enjoy and appreciate nature (and accompanying cultural features, both past and present) that promotes conservation, have a low visitor impact and provide for beneficially active socio-economic involvement of local peoples”.

The World Tourism Organisation (http://www.unwto.org) (WTO, or United Nations World Tourism Organisation, UNWTO) summarises the definition of ecotourism as follows, typically as a principle for ecotourism managers and organisers:

1. All forms of tourism based on natural resources where the primary motivation of tourists is the observation and preservation of nature, and cultures close to nature
2. It is accompanied by education and the comprehension of the phenomena
3. It is typically – but not exclusively – built on local businesses having small groups of clients
4. It minimises negative impacts on nature and socio-cultural environment
5. It supports the protection of the nature by the following ways: it
   - brings economic benefit for the receiving communities, organisations and authorities dealing with the preservation of the natural environment
   - creates alternative employment and income possibilities for the local communities
   - raises the awareness of both local inhabitants and tourists concerning the necessity of the preservation of natural and cultural values.

It is very difficult to assess the market share of the world’s ecotourism, partly because it is organically linked to other tourism activities, and also because the definition of ecotourism is not universal, and accordingly the statistical data are also collected in different ways. In the light of this, UNWTO estimates the market share of ecotourism to be around 1 to 9 per cent, while this figure is about 20% in Europe.

The birth of the present form ecotourism as a product in its own right originates from the post World War II period, also linked to the appearance and transition of consumer society. The development of the tourism supply can also be traced back to individualisation typical of consumer society, which process has many implications for ecotourism too. One of the aspects of individualism is that travellers of the consumer society wanted special, unique experiences. Another aspect is the decrease of embeddedness, the increase of mobility, as a result of which distant destinations also became accessible. In the mid-60s then a new form of travel appeared: adventure tours, which participants chose for some extra sports achievement (e.g. mountain climbing), or special aesthetic experiences or natural phenomena (volcanoes, the observation of exotic animals etc.), or simply to try a specific means of travel (boats, elephants). The primary destinations of these travels were countries of the third world with their almost unspoilt nature offering perfect scene for adventure tours: the very being there was an adventure and also an experience. Travellers fascinated by the new pleasure of consumption – and also the
organisers of tourism – used natural areas at that time without taking into consideration the principles of sustainability, which soon made the negative impacts of tourism palpable. In these same years, in the late 1970s and early 1980s the world organisations of nature and environment protection were created and they drew attention to the problematic impacts on the natural and social environment induced by the travels. Their campaigns resulted in the organisation of the first eco-minded tours and to the birth of ecotourism per se as a form of travel. The first definition of ecotourism was made by Hector Ceballos Lascuráin, and this way ecotourism was raised to the level of the other tourism sectors and was given more and more attention, due to the ever strengthening global and local movements of environment and nature protection. The appearance and development of ecotourism thus perfectly fits into the worldwide trends: the appreciation of nature, increased environmental consciousness, evaluation of health and healthy environment, self-expression, the strengthening of individualisation, the search for authentic values (or values looking authentic), globalisation and the access to information.

In Hungary the idea of eco-minded tourism appeared with the thought of the establishment of national parks. Tamás Szontagh geologist made a recommendation in 1879 on the assembly of the Hungarian Physicians and Naturalists “for the protection, preservation and maintenance of the natural values, with regard to the basalt columns of Somoskő”, and it was also him who wrote in 1913 on the importance of national parks in tourism: “And the lucrative industry of serving guests and travellers does depend to a large extent on the beauties and rarities of nature, among other things.”

Mór Déchy, member of the Hungarian Academy of Sciences wrote in 1912 in his essay called “The protection of nature and the national parks”: „The establishment of the National Park is not only desirable from the aspect of science, though. An economic significance can also be attributed to this institution. In the designation of the place we have to make sure that a region rich in natural beauties be chosen which was less known or not known at all formerly. This way we definitely are able to create substantial tourism in an area derelict and neglected before. This means that we have to provide access to the park with good roads, so that all friends of nature have the chance to look into the special, ancient world for whose preservation the institution of the national park is dedicated. The observation and studying of the vegetation with ancient beauty and the undisturbed wild animals will give unprecedented joy and many things to learn to the visitors of the national park.”

The events of the 1900s, however, did not favour the creation of national parks, so the first park of Hungary, the Hortobágy National Park was created in 1973, only (http://www.hnp.hu), and the tenth national park was established in 2002, this was the Őrség National Park (http://onp.nemzetipark.gov.hu).

Conscious ecotourism developments started in Hungary in 1998, when, on the initiative of the Office of Nature Protection of the Ministry of the Environment and Regional Development, a task force dealing with ecotourism development was set up. The task force functioned until 2004, when its role was taken over by the ecotourism departments operating within the directorates of the national parks.

2. Elements of supply

In connection with ecotourism, the issue of sustainability is an almost always emerging one. This is not accidental, since ecotourism is the tourism product that is suitable for the handling of the seemingly unmanageable oppositions in tourism: it features attractions and services in a way that resources are not ruined, still the economic benefits of tourism are realised. We often encounter the statement that ecotourism is sustainable tourism, but this is an incorrect belief. Ecotourism is a product which has to take the sustainability principles of tourism into consideration as much as possible. A sustainable tourism must in the long run be ecologically suitable, economically viable and ethically and socially fair for the local population.

The supply structure of ecotourism is special from many aspects, as it does not exclusively has to adapt to the demands, to the needs of the visitors but it should primarily focus on the protection of environmental values, and on the service elements designed for and realised besides the protection of these values.

2.1. Attractions

The attractions of ecotourism are built on the natural endowments. It is important to emphasise though that natural endowments and natural values in themselves are not necessarily attractions. For the protected flora and fauna of a given region to become real attractions, in most cases it takes interpretation techniques and tools which are suitable for the successful presentation of the given natural or cultural-historical values. The objective
of ecotourism services, besides giving tourists an unforgettable experience, is to make visitors more dedicated to the preservation of natural, cultural and social values.

When creating the ecotourism product we have to consider that the respective elements of the tourism supply should harmonise with the objectives of ecotourism. Accommodations should preferably be buildings fitting into the landscape, with minimum stress on the environment and applying environmental-friendly procedures; also, catering should be based on foods made from local products. An indispensable part of ecotourism is the involvement of guides and experts providing knowledge dissemination and education in the design and implementation of programmes. In absence of guides, adequate information network, infrastructure and interpretation are needed to allow visitors to get a deep and enjoyable knowledge on the area. The success of the ecotourism product is secured if it is built on local resources and the services are offered in the first place by local inhabitants (e.g. accommodation, catering, maybe guiding). In addition, one of the biggest sources of please for ecotourists is the relationship built with the local people, getting to know the local culture, habits, and participation in the lives of the local people.

The areas worth offering for visitors in Hungary are usually protected, and in protected areas it is protection that has a priority. The management of protected areas in many cases, their supervision is always the task of the national park directorates. The respective national parks belong to the national park directorates, together with other sensitive areas that “only” have Nature Protection Area or Landscape Protection Area status. Hungary is now divided into 10 regions from the aspect of the management of protected areas; each region has a national park whose supervisor is the directorate of the respective national park. The other protected areas in the region are also supervised by the national park directorates, but they are not parts of the national parks. The national park directorates are institutions, authorities, whereas national parks are protected areas; these two concepts must not be confused. E.g. the supervision of the Danube-Dráva National Park (http://www.ddnp.hu) is done by the Directorate of the Danube-Dráva National Park, also responsible for the supervision of the Zselic Landscape Protection Area in the region. The Zselic Area, however, is not a national park, it is only an area under the supervision of the national park directorate.

The national park directorates have, in addition to their nature protection activities, exhibition, educational and tourism tasks. Now there is a department at each national park directorate which is responsible for exhibitions and tourism. The national park directorates are obliged by law to demonstrate the protected areas: in accordance with the Act No. LIII. of 1996 on the protection of nature, Part 4 Par. 64 (2) (http://www.kvvm.gov.hu/index.php?pid=11&sid=11&hid=439), “in protected areas the national park directorates must provide access to the protected natural values as part of knowledge dissemination, education, scientific research and tourism”. This actually means that the act makes tourism a “compulsory” task of the national park directorates; this is the reason why a significant part of the Hungarian ecotourism supply is offered by the national park directorates. For the national park directorates, tourism is also a source of revenue that is more and important for them. The budgetary organisations “consuming” state support can gradually become income generators by their tourism services.

It is a problem on the demand side that the Hungarian planners of ecotourism are nature protection experts and not tourism professionals; their market skills are deficient. In nature protection there are many things that cannot be approached and made successful on the ground of education: beyond knowledge dissemination through education, emotions must also be targeted. As a tool of effective exhibition and environmental attitude shaping, in addition to credible information it is experience that also matters – or should also play important role.

The share of nature parks and other ecotourism NGOs is continuously increasing in the territory of Hungary. These are usually voluntary organisations that cover areas smaller than those of the national park directorates. In addition to the protection of the values of nature they try to preserve the folk traditions of the respective areas (e.g. through the organisation of traditional programmes). The establishment of a nature park is also based on the natural values, and an ecological farming is allowed in these areas for the protection of the natural values. In Hungary nature parks are not so much nature protection areas, they are more of spatial development character.

The actors operating at different levels and having different roles (non-governmental organisations, ecotourism service providers and forest schools) also have different tasks and competencies. Their effective cooperations may promote the division of the tasks and hardships concomitant with the development of the supply structure, and also the quantitative and qualitative change of the supply. The national park directorates, nature park associations, non-governmental organisations and ecotourism service providers are the main basis, in addition to the service providers of other tourism infrastructure.
We must not forget, however, that the target areas of ecotourism are not exclusively protected areas, and the needs of market can be better focused on in non-protected areas.

2.2. The infrastructure of ecotourism in Hungary

The national park directorates, the non-governmental organisations and the municipalities operate ecotourism exhibition places. These places can have various forms:

- Visitor centre or reception centre: these are complex institutions established at the centres of the national parks or in other areas visited by tourists, whose basic services include an information desk, exhibition room for permanent and temporary environmental exhibitions, a conference room, a workshop and a “green” shop. In addition, auxiliary services may include a library of publications on nature protection, catering facilities and accommodation. Such establishments are the e.g. the Harmattáni Educational and Visitor centre in Óriszentpéter (Őrség National Park), the Hortobágy Visitor centre (Hortobágy National Park), the Salföld Farm in the Balaton Upland (Balaton Upland National Park), the Körös-valley visitor centre in Szarvas (Körös-Maros National Park), the Bechtold István nature protection visitor centre in Köszeg (Őrség National Park) (Photo 1), or the Csapody István visitor centre in Fertőújlak (Fertő-Hanság National Park).

Photo 1: Nature Protection Visitor centre in Köszeg. Photo by Erzsébet Pénzes

- Educational centre, with nature-related workshop programmes: due to its primary function, the environmental education programmes offered in these places are primarily used by organised school and forest school groups, often together with accommodation. Examples for these establishments include Fecskeház (‘Swallow House’) Forest School in Hortobágy-Máta (Hortobágy National Park), Naprózsa (‘Sunrose’) Forest School in Fülopfé鮎a (Kiskunság National Park), Green Community House and Forest School in Mórahalom (Kiskunság National Park), Nyugati Kapu (‘Western Gate’) Educational and Visitor centre in Felsőtátrákány (Bükk National Park), Pangea Educational Centre in Pénzesgyőr.

- Local sights or specialised exhibition places: places designed for the general introduction of natural or cultural heritage of a specific type, and the surrounding area. Typically, several forms of introduction are applied, including geological exhibition places, show farms, arboreums, local museum houses and local history exhibitions, e.g. the Hegyestű (‘Sharp Needle’) geological exhibition place in Monoszló (Balaton Upland National Park), the Kotsy Watermill in Zalaszántó (Balaton Upland National Park), the Vésztő-Mágó Historical Exhibition Place (Körös-Maros National Park), the White Stork Museum in Kölked (Danube-Dráva National Park), the Eszterházy Bird Watching Post in Oslí-Földsziget (Fertő-Hanság National Park), or the geological exhibition place of Gánt. The open-air exhibition places are not bound by opening hours, they can be visited at any time of the day or year (e.g. by a signpost introducing the protected geological excavation), like the Kálvária Hill in Tata or the quarry of Sámsonháza.
- Study path: a special theme path that exhibits the natural and cultural heritage of an area, usually by signposts and/or publications located at stations, allowing visitors to gather information actively (Photos 2 and 3). Hungary has more than 400 study paths, e.g. the Tisza Lake water path at Poroszló, the Tiszavirág (‘Mayfly’) flood plain walking path at Tiszafüred, the Szálkahalom (‘Heap of fish bones’) study path (Hortobágy National Park), the Vár-hegy (Castle Hill) study path in Felsőtárkány (Bükk National Park), the Lóczy study path Tihany (Balaton Upland National Park), Báránypirosító (‘lamb dying’) study path in Fülöpháza (Kiskunság National Park), or the Gyada study path at Vác.

Cave exhibition place in more or less explored caves open to visitors, e.g. the Baradla Cave in the Aggtelek Mountains or the Csodabogyós (‘Butcher's Broom’) Cave in the Keszthely Mountains.

Photo 2: Sign of a study path in the Szigetköz. Photo by Péter Tóth-Almási

Photo 3: Interpretation sign at the study path of the forestry company of Szombathely. Photo by Erzsébet Pénzes

Hiking paths are usually also classified as parts of the ecotourism supply: although there is no exhibition along these trails, they are still one of the main pieces of infrastructure of active ecotourism. In addition, further exhibition tools of ecotourism and nature are watch posts offering wildlife watch, and other signed hiking trails. The supply of ecotourism also includes programmes with professional guides, and, if accompanied by exhibition or the support of the local community, also active ecotourism services such as canoeing, cave visits or special days (Day of Birds and Trees on 10 May; Day of the Earth on 22 April etc.).
2.3. Suprastructur

Typical accommodations of ecotourism are the so-called eco-lodges, frequently discussed in the international literature but rather rare in Hungary. Such an accommodation is e.g. the Öko-park boarding house in Szarvaskő (http://www.oko-park.hu/) or the Kacár Farm in Szokolya (http://www.kacar.hu/). In the centres of the Hungarian national park directorates and connected to the visitor centres and forest schools we also find accommodations, offered mostly to researchers and school groups; their equipment and construction style satisfy such demands, they are often in the tourism accommodation category. Ecotourism may also involve the local accommodations used by rural tourism, as through these accommodations the ecotourism product can involve and support the local community (see Chapter 6.).

3. Features of the demand

The demand for ecotourism is different in Hungary and the rest of the world. While the international literature writes about large ecotourism destinations where tourists arrive after buying packages, the Hungarian demand is mostly analysed in connection to visits to nature.

3.1. International demand

According to the data featuring the findings of a 2005 survey of the International Ecotourism Society (http://www.ecotourism.org/atf/cf/%7B82a87c87c8d-0856-4049-8b0a-c4e9ed1c98%7D/TIES%20GLOBAL%20ECOTOURISM%20FACT%20SHEET.PDF), the consumer groups participating in international ecotourism can be characterised as follows:

- two-thirds of the tourists from Great Britain are aged 25-40;
- this figure is 70% in North America;
- North American tourists prefer travelling in summer, but pre- and after-season are also favoured;
- the average duration of stay of visitors of nature is 5-9 days in the USA;
- in Australia an average of 33 days are spent on getting to know natural environment;
- the Hungarian travellers only spend 3 days on ecotourism activities on the average, only 20% of them spend more time on ecotourism.

3.2. Travel habits of the Hungarian population

Hungary has splendid endowments for participants in ecotourism, still the country is not among the top destination of the world in this respect. The majority of the participants in ecotourism are Hungarian tourists. The Hungarian Tourism Inc. made an assessment on the travel habits of tourists participating in green tourism, but no report on ecotourism as such has been made so far. Although green tourism is not identical with ecotourism, some of its elements can be related to this tourism activity. Activities having the closest ties are hiking and excursions in nature. If is sad that 39.4% of respondents never make a tour, and only 3% of them mentioned visiting national parks as their main motivation. The Hungarian Tourism Inc. differentiated among four groups of hikers:

- indifferent, do not make excursions and not interested in the activity (11%);
- like touring and have information but do not take it as a sport (31%);
- consider it a healthy activity but not a sport (24%);
- keen excursionists without much knowledge, the emphasis is on community experience and sport (34%).

According to the survey mentioned above (http://itthon.hu/szakmai-oldalak/turisztikai-termekek/turisztikai-termekek#_Z%C3%B6ldturizmus), the main characteristics of Hungarian ecotourists are as follows: they

- are young or middle aged.
Pál Horváth: Ecotourism

- have higher school qualification;
- have an above average income;
- are families;
- have as their main motivation the beauty of nature, tranquillity and clean air.

Table 1 demonstrates activities done by the visitors of national parks and the services that they use.

<table>
<thead>
<tr>
<th>Activity done during the visit</th>
<th>Service used</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Walking, hiking (63.8%) 2. Visit to study paths and other exhibition places (49.1%) 3. Cave tour (23.1%) 4. Organised programme with guide (19.3%) 5. Cycling (15.7%) 6. Tasting traditional foods, wine tasting (15.6%) 7. Passive recreation (14.1%) 8. Paddling (7.3%) 9. Horse riding (4.3%)</td>
<td>1. Catering (41.8%) 2. Purchase of souvenirs, books etc. (36.8%) 3. Organised programme with guide (36.0%) 4. Simple accommodation (17.4%) 5. Middle-category accommodation (17.4%) 6. Bicycle rent (9.9%) 7. High quality accommodation (4.5%) 8. Organised travels (8.0%) 9. Canoe rent (5.4%)</td>
</tr>
</tbody>
</table>

Table 1: activities done by the visitors of national parks in Hungary and the services that they use. Source: Hungarian Tourism Inc., Ministry of the Environment and Water

3.3. The motivations, behaviour and socio-cultural background of tourists

The primary motivation of tourists participating in ecotourism is the observation and evaluation of the beauties of the landscape and nature, and getting to know the culture of the visited areas. In addition, however, the demand for getting new experiences and seeing new places is also becoming more and more important.

When implementing ecotourism developments, it always is the actual features and demands of the specified segments that have to be taken into consideration. More in-depth consumption surveys demonstrate that there are no “clear” traveller types, today’s intensive travellers travel in many different ways. In this approach everybody is only an “occasional” ecotourist, because they also visit cities, make holiday in rural areas or at seaside. On the basis of the “clarity” of consumption thus it is difficult to differentiate among the types of tourists, the basis of differentiation can only be the quality of consumption (Urry, 1995).

The definitions worded in many ways show that only a part of the tourists participating in ecotourism are “real” ecotourists. In ecotourism, we have to consider several target groups, on the basis of different motivations. Academics and authors gave different names and definitions to the respective target groups. The International Ecotourism Society (http://www.ecotourism.org) differentiates among four consumer segments on the basis of driving forces, motivations chosen. These motivations and driving forces of the respective groups are rather different, from active recreation to “occasional” visits. In other words, conscious ecotourists are only a small part of participants in ecotourism, because if all tourists acted consciously, tourism would not have negative impacts. The four consumer groups also taken by the Hungarian ecotourism development strategy (http://www.mth.gov.hu/download.php?ctag=download&docID=422) into consideration – are as follows:

1. occasional green tourists (50-60% of all visitors):
   - they make short visits of one hour or two;
   - their main motivation is getting to know a place of historical relevance or protected natural area, as well as entertainment;
   - the main attraction for them is special natural landscapes, tranquillity and clean air;
   - their interest can be grabbed with awareness raising events, they are more attracted by experiences than receiving in-depth knowledge;
   - they travel primarily when weather is fine for excursions;
   - the require higher comfort level and are less keen on active recreation;
- they decide on the basis of what they hear from acquaintances and friends, in the first place;
- they use middle category accommodations;
- they typically make self-organised tours, but they also may be participants of group tours who only pay a short visit to an exhibition place.

The service packages used by this group are the following:
- well-known and well built out exhibition places, visited study paths easily accessible by car;
- programmes enriched with experiences, e.g. carriage riding in the ‘puszta’ (waste land) or horse riding.

2. active green tourists, “outdoor tourists” (20-30% of all visitors):
- this group can be divided into one-day, several days and longer stays. They are typically young;
- the main motivation of the tourists is to pursue some fashionable outdoor sport or active recreation;
- these people can be divided into two groups on the basis of their interest: those interested in adventure tours, and in outdoor sports (mainly hiking), the centre of their interests is recreation;
- they frequently participate in eco-tours or eco-based tours;
- their travel does not depend on the weather;
- they see special landscape and clean air as attractions too;
- they gather detailed information on the accessible values of the areas, the exhibition places, accommodations etc.;
- the sources of information they use include internet, catalogues, travel guide books;
- they also use middle category rural tourism and private accommodations.

The service packages used by this group are the following:
- sport activities that can be pursued in beautiful natural environment;
- they primarily make group travels, both in organised and non-organised way.

Within the category of conscious ecotourists there are two sub-segments on the basis of their motivations and activities:

3. ecotourists (10-15% of all visitors)
- their main motivation is getting to know and understand natural-ecological values;
- they feel themselves responsible for the protection of the natural environment and they actively do something for that;
- they visit areas for a longer time, in order to get to know their values more thoroughly;
- their travel does not depend on the weather;
- their level of tolerance to environment pollution is low;
- they are willing to take an active part in researches and eco-projects.

4. dedicated ecotourists (5-10% of all visitors)
- for this segment ecotourism is more of a lifestyle than a product;
- they regularly participate in ecotourism;
- their primary motivation is learning;
- the love of nature and the concept of sustainability are parts of their lives;
- they often sleep in tents, they require simple but environment friendly accommodations;
- they take an active part in nature protection.

The service packages used by this group are the following:

- instead of spectacular and striking programme elements, they choose a destination in order to get to know the values significant from natural sciences or cultural history perspective;
- they prefer to purchase local products, in fact, they search for such products;
- they often try the local public transportation, they travel in an environment friendly way, by bicycle or on foot, or by public transport;
- they use as much information as possible before making their travel decisions.

We have already referred in the previous chapter to the fact that tourists travel for experiences, visitors buy experiences when they see the exhibition place, and it is experiences that make them spend their leisure time on the visit to some attractions. The transfer of knowledge in itself is very rarely enough to offer a real experience; it also takes some other – interpretation – tools to fully satisfy tourists. Passing on information without experiences is similar to teaching, which is not a good approach from the aspect of tourism, in this place, from the aspect of environmental attitude shaping.

Furthermore, interpretation also means that if it is impossible to develop attractions, we should develop the expectations and experiences of tourists, instead (Packer, 2008). Interpretation is a tool for getting to know and understand local values, as it effectively makes tourists aware of the natural and cultural values. Besides the protection of values, interpretation itself creates a value.

Tourists also have a role in the interpretation process and the creation of the experience, which is realised by the collaboration of tourists and service providers. In this collaboration service providers have the task of “orientating experience in the right direction”.

### 4. The market and trends of ecotourism

#### 4.1. The international market for ecotourism

The market of ecotourism has been one of the fastest developing tourism segments for years. A world phenomenon promoting this process is that tourists more and more consciously seek experiences enriching their lives and worldview, including the values of healthy environment and nature. This is related to the changing attitude to nature – realising the significance of the preservation of species and ecosystems –, the development of environmental education in public education and the growing attention of media in environmental issues.

From the 1990s, ecotourism has reached an annual growth of 20-34%, which compared to year 2004 means that the market of ecotourism grows three times more rapidly than the whole of the tourism sector. Similarly to the branches of alternative tourism (heritage, cultural, adventure or countryside tourism) a significant growth is expected in the development of ecotourism in the coming two decades as well, parallel to the stagnation of the traditional sun-sea-sand market; in fact, the latter market will more possibly shrink by a few per cents. Analysts expect an increase in the field of eco-accommodations and green hotels, a continuous growth is possible in the nature-related forms of tourism, and in the light of this it is forecasted that ecotourism will be one of the first activities to profit from these phenomena.

The market of ecotourism is not a single market. A wide spectrum of products/experiences may belong here, also, the market is characterised by several consumers activities, motivations and features. One of the most important trends is the participation of the elder generations in the major markets of ecotourism: in North America, Northern Europe and to a smaller extent in Japan. As they are getting older, they are less and less interested in active, tiresome and dangerous activities; they prefer less tedious programmes related to the watch of nature. The proportion of the generation older than 55 reached 25% in the United States of America by 2010,
with a population of 75 million, and their share from the total population is similar in Europe, Canada or Japan as well. This layer with substantial leisure time and discretionary income is an excellent market for ecotourism.

A problem related to the interpretation of ecotourism is that travel agencies, taking into consideration the sensitivity of the consumers in this respect, label all of their products offering nature-related services or done in nature with the “eco” specification.

### 4.1.1. The most renowned eco-destinations of the world

The most important ecotourism destinations on the international market are Latin America, Africa, Australia and some parts of Asia.

In Latin America ecotourism is mostly concentrated on the mountains of the Ands, and the forests of the inner regions. In this area the overweight of tourists coming from the United States of America is not as definite as in the case of Mexico or the Caribbean; besides the visitors form the USA a large number of European visitors also arrive here. Brazil has an outstanding significance, in this country the environment friendly attitude is becoming more and more typical, following the traditions of the 1992 Rio Conference.

In the larger part of Africa visitors are attracted by huge open areas, exotic wildlife and tribal culture. The wildlife of East Africa, the safaris, the huge national parks of Kenya, Tanzania and Uganda may be the most famous destinations, but the South African countries also consider as central elements their unspoilt national parks, which are better protected than the East African ones and where the demands of the animals are more often taken into consideration (http://www.wildlifesaf.co.za/). Both regions are successful in attracting tourists from the largest tourism markets of the world (USA, Great Britain, Germany etc.), despite the fact that in East Africa market sales are hindered by serious social and economic problems.

The huge and sparsely populated continent of Australia is an important attraction in ecotourism, due to its unspoilt seaside, deserts and mountains and the political stability of the country. Its main markets are the countries of the Pacific region, mostly the USA and Japan.

In Asia it is mainly India

(http://www.ecoindia.com)

and Nepal

(http://www.nepal-guide.com/nepal_eco_tourism.htm)

that are significant ecotourism destinations. India’s ecotourism market includes the large countries of origin in Europe (United Kingdom, Germany, France), the United States of America, but the country also receives a considerable number of tourists from the Middle East and Japan. The average duration of stay is very long, 28 days, but this also includes the visits to the relatives having emigrated to the United Kingdom and the Middle East. The proportion of young tourists with rucksacks is also high; they spend 21 days on the average in India. The Indian sub-continent has the most diverse fauna and flora after Africa, and in the proportion of protected areas it is Africa again that can compete with India, only. Since 1911 more than 70 national parks and 330 game reserves have been established in the country. In Nepal it is the ridges of the Himalaya that are the primary attraction, apart from China it is the place from which it is possible to approach the highest peaks in the world, the Mount Everest or the Annapurna. The visitors to Nepal are usually mountain climbers, mountain hikers, adventure tourists, but white water rafting and mountain cycling are also available in Nepal. The most popular activity – attracting a quarter of the visitors – is mountain hiking, where tourists visit with the assistance of local carriers and guides the probably most spectacular mountains of the world, far from all inhabited settlements.

### 4.2. International trends

In the United Kingdom ecotourists are typically 25-54 years old (two-thirds of them), a similar proportion can be seen in North America where the share of this generation is approximately 70%. The age of the tourists impacts to a large extent on the experiences that they seek: a higher proportion of visitors under 24 participate in physically challenging activities such as mountain climbing, kayak tours, rafting, cliff climbing and sailing. In Australia this age group is interested in derelict lands and in safaris, the age group of 25-34 is more keen on diving, while the national parks are more typically visited by people older than 55.
Literature has little information on seasonality. The North American ecotourists like travelling in summer (23% in June, 40% in July and 40% in August), but the pre- and post-season months are also popular (16% for May and 29% for September), also, there are ecotourists even in winter.

The length of the travels is rather varied, depending on the activity chosen. The average USA tourists on vacation spend less time (3-4 days) than the nature walkers (5-9 days) during their travel. In Australia, those who arrive with the goal to see the natural environment spend an average of 33 days in the country, those on vacation 24 days. The domestic travellers, however, only spend half a day or one day with ecotourism activities and only 20% of them spend four days or more; the average is only there days.

A quarter of the North American tourists wish to spend USD 200 per capita on ecotourism activities, and they also calculate USD 238 per capita for travel costs. For specialised ecotourism products there seems to be a higher spending willingness. It is also evident that people are willing to pay more for rare natural values than for values similar attractions to which can be found in many places. Of course the willingness to spend money also correlates to the quality of other services, like tourism information centres, the quality of accommodation and guiding, and of traffic devices.

### 4.3. Hungarian trends

The Hungarian ecotourism market is quite different from the international one. While in the case of foreign destinations (Western Europe, USA, Australia) literature is on large ecotourism destinations and the eco-tours organised by tour operators specialised on these destinations, in Hungary the scales are much smaller and ecotourism in this country is mostly built on domestic tourists. It is usually unorganised tours, i.e. tours organised by travellers themselves, and products are far from being complex for the time being. It is usually one-day visitors who travel to Hungarian ecotourism exhibition places, the number of foreign guests visiting Hungarian ecotourism sites is rather small.

There is limited professional literature on Hungarian ecotourism, as no comprehensive and representative national survey has been made specifically on ecotourism yet. The document called “Report on the Hungarian Tourism Inc. on the achievements of the Green Tourism Research of 2006” (see at http://itthon.hu/szakmai-oldalak/turisztikai-termeket/turisztikai-termeket%20-%20%C3%B6kztet%20tirizmus), published in 2007 revealed that the Hungarian ecotourists (green tourists) were typically domestic tourists, young or middle-aged, with above-average school education and also above-average income. They frequently include four-member families raising children and men without children. Their main motivation is the excursion possibilities, the beauty of natural environment, the clean air and tranquillity. It is only 3% of travellers who start a journey just to visit a national park, and approximately 6% of them consider this opportunity when planning their trips. On the other hand, visit to a national park – if it is in the way, anyway – is welcome, 18% of respondents visit these destinations, if they can. When visiting national park, what these tourists consider as especially important is natural values, beautiful landscape, clean air and tranquillity environment.

They typically require more simple and middle-category accommodations, i.e. what they choose is 1 and 2-star hotels, tourist and youth hostels, holiday homes. They have a definite demand for complex service packages, professional guidance and lecturing.

They also require catering facilities and other services of the visitor centres. They would be happy to use all these in complex service packages including travel, accommodation, catering and organised programmes.

The most visited Hungarian destinations receive 30–150 thousand people annually (see Table 2). Most visited sites with 100–150 thousand visitors a year or more are the Baradla Cave in Aggtelek (http://www.baradlaecoportal.hu/index.php?lap=baradla_barlang), the cave with lake in Tapolca (http://www.bfnp.hu/magyar/oldalak/tapolcai_tavabarlang/), and the caves of the Buda Mountains. Approximately 50–100 thousand people are received by the cave of Abaliget (http://ddnp.nemzetipark.gov.hu/index.php?pg=menu_2465) and the buffalo reserve of Kápolnapuszta (http://bfnp.nemzetipark.gov.hu/index.php?pg=sub_33). Every year, 30–50 thousand tourists visit the Szént István (Holy Stephen) Cave, the Bat Museum of Abaliget, the visitor centre of the Hortobágy National Park (http://www.hnp.hu), the monuments of folk art and architecture in Pityerszer (http://onp.nemzetipark.gov.hu/index.php?pg=menu_2510) and the Hegyeső geological exhibition place (http://bfnp.nemzetipark.gov.hu/index.php?pg=sub_27). It is evident that the most visited places are mass tourism destinations, easily accessible and popular anyway, while the rest of the national park visitor centres are not very well known and hardly receive any visitors in many places.

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Tourism policy features of ecotourism

The Hungarian National Tourism Development Strategy (NTDS) classifies heritage tourism built on cultural and natural values to the tourism products of selected national importance. On the basis of the objectives in the NTDS, on the assignment of the State Secretariat of Tourism of the former Ministry of Local Governments a national ecotourism development strategy was made in 2008. The strategy-makers created the ecotourism development plan for the coming 8 years with consultations with the ministry responsible for tourism and environmental protection, the national park directorates, non-governmental organisations and service providers.

After the approval of the strategy, a Task Force of Ecotourism was set up on the initiative of the State Secretariat of Tourism of the Ministry of Local Governments and the Secretariat for Nature and Environmental Preservation of the Ministry of the Environment and Water. The members were selected from the representatives of the two ministries, and the task of the group was the implementation of the strategy in practice. The task force continues its operation, after the establishment of the new government, with the inter-ministerial cooperation of the Ministry of the National Economy and the Ministry of Rural Development.

The strategy worked out concrete tools and tasks for the balanced consideration of the aspects of nature protection and tourism. An issue of selected importance in the strategy is the visitor-friendly development of the ecotourism attractions and service providers, and the establishment of visitor centres offering complex services. On the ground of Measures 1-3 and 6 in Priority 1, Measures 1-4 in Priority 2, Measures 2-4 in Priority 5 and Measures 1-3 in Priority 6, a special role must be assigned to the establishment of visitor- and family-friendly exhibition places meeting the specific requirements of the target groups, both as regards the already existing and the planned exhibition places, study paths and other services.

The task force defined in the first phase of their work those tasks that require fewer resources, including the start of the visitor- and family-friendly developments.

The New Hungary Development Plan (NHDP) has several indirect implications for ecotourism. This document states that in the development of the rural areas, the tourism of natural values is a possible tool, both for the development of the environment and for health-conscious teaching and education. On this ground the NHDP supports in rural areas with low number of population and low population density the integrated development of products based on local and regional endowments and of (tourism-related) services built on the initiatives of the reviving local communities, as far as the aspects of sustainable development are respected. Also, almost each of the LEADER programmes in the implementation phase handled ecotourism developments as a field where tenders could be announced – the recommended topics of the applications included ecotourism-related services, although not specifically named as ecotourism (e.g. establishment of study paths etc.). The development of rural areas can be implemented from the European Agricultural Fund for Rural Development (EAFRD). The renewal possibilities of the rural areas are different in areas of different endowments. This is what makes important in areas abundant in natural, landscape and cultural values the sustainable local, regional utilisation of local values and resources, by the close collaboration of spatial development, nature- and heritage protection and tourism.

· The nature-related legal environment of the development of ecotourism is Act No. LIII. of 1996 on the protection of nature, and Chapter 9 of Act No XXXVII. of 2009 (Forest Act). The new act on the forests made several restrictions for tourism activities pursued in forests, especially as regards equestrian tourism.

<table>
<thead>
<tr>
<th>number of visitors</th>
<th>visitors destination (competent national park directorate)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100–150 thousand people</td>
<td>Baradla Cave (Aggtelek National Park) Lake Cave of Tapolca (Balaton Upland National Park) Buda Mountains Caves (Danube-Ipoly National Park)</td>
</tr>
<tr>
<td>50–100 thousand people</td>
<td>Abaliget Cave (Danube-Dráva National Park) Buffalo reserve Kápolnapuszta (Balaton Upland National Park)</td>
</tr>
<tr>
<td>30–50 thousand people</td>
<td>Hegyestű geological exhibition place (Balaton Upland National Park) Szent István Cave (Bükk National Park) Pityerszer (Örség National Park) Zirc Arboretum (Balaton Upland National Park) Salföld Farm (Balaton Upland National Park) Bat Museum (Danube-Dráva National Park) Tisza Lake Water Trail (Hortobágy National Park) Hortobágy Visitor centre (Hortobágy National Park)</td>
</tr>
</tbody>
</table>

Table 2: Annual visitor numbers at the exhibition places of the Hungarian national parks (averages of several years). Edited by the author, based on the data of the Ministry of the Environment and Water
Socio-cultural and economic environment of ecotourism

In accordance to what is written in Chapter 2, in the case of ecotourism the protection of the natural environment must be considered during tourism developments. The market of ecotourism, however, is not only made by conscious ecotourists but also people with other motivations, so when talking about ecotourism attraction we do not only have to deal with the so-called ecotourists but also with other tourists – because if all visitors were conscious ecotourists, the negative impacts of tourism would practically not exist. The motivations of the visitors to nature are diverse, from active recreation through the study of nature to “I just came across so I popped in”. Certain ecotourism services are thus definitely designed for the masses, and some of the Hungarian ecotourism destinations have to face, serve and handle the mass tourists. This is a paradox statement for many, but let us take a closer look at the situation!

One of the tasks of ecotourism is the shaping of the attitude to the environment. A real, conscious, genuine ecotourist does not need attitude shaping; the mass tourist who does not know nature is the one who has to be the subject of this attitude-shaping work. Very important in this work is the teaching and education of the young generations (Photo 4).

It is also absolutely evident that the positive impacts of ecotourism (job creation, income for the local community, revenues for nature protection) can only be realised if ecotourism attracts to the service providers a mass of tourists that is still acceptable for the carrying capacity of the area but also allows the utilisation of the place and the generation of adequate income. Empty visitor centres and exhibition places not consciously marketed or not marketed at all will not result in positive impacts, neither will they generate income for the operator, but will lead to the unnecessary waste of financial and human resources.

Ecotourism is a means of passing on environment conscious attitude; it promotes pastimes with active movements, whose health preserving effect can have a considerable contribution to the improvement of the quality of life.

Photo 4: Stork labyrinth – an interactive exhibition in Köszeg on the life of storks. Photo by Pénzes Erzsébet

Coming from the general increase in the demand for natural environment and the improvement of the living standards of the layer receptive to such tourism, ecotourism and its auxiliary services provide a living or a supplementary source of income to an ever increasing number of people. In many places this is the only breakout possibility for the economic development of a region, in cooperation with agriculture, the sales of local products.

Ecotourism has not been able to make a breakthrough yet because the business sector has only joined in the developments to a limited extent so far. The main reason for this is that several service providers do not know the advantages and benefits of ecotourism, and there are many false beliefs in connection with ecotourism (e.g.
that ecotourists are “gumboots” people with low spending). Due the deficient communication, the Hungarian population knows little about ecotourism for the time being, they have no information on the possibilities it offers, although a few nature protection exhibition places established in a new approach could be real competitors to famous places of entertainment and popular destinations. There are opportunities then in the field of marketing communication, both for nature protection and ecotourism service providers.

It comes from the thoughts above that during ecotourism developments market needs must be taken into consideration, together with the habits of the postmodern tourists of consumer society, even it seems to be a blasphemous thought at first hearing. Consumer demands and nature protection can be reconciled; the appearance of mass tourists does not necessarily mean an immediate degradation of the area, environment pollution and other negative impacts. If tourists are “directed” in the right way, if visitor management operates effectively, then the attitude shaping and other positive impacts can be realised. This does not mean, however, that the natural environment should be fully built up with adventure elements; it means that the existing exhibition places must be transformed in a visitor-friendly way with a new attitude.

Infrastructure developments (parking place, WC, resting place, catering facility, souvenir shop, guiding etc.) must all serve consumer demand, the satisfaction of visitors, in an indirect way this is how they contribute to the acceptance of ecological attitude. Where natural environment does not allow the presence of “non-ecotourists”, it is only developments specially designed for ecotourists that can be implemented. This does not mean that ecotourists do not have needs or they only have more modest needs.

The improvement of the quality of ecotourism services in many cases is also important for the preservation of the natural environment providing the attraction, because the visitors use the controllable infrastructure designed and made for them and not the resources of nature; also, the “message” gets more effectively to the visitors.

Developments satisfying family-friendly needs should be given a priority; this is also listed by the national ecotourism development strategy as an activity of selected importance.

Ecotourism and nature

Areas with unfavourable endowments for agriculture (dry lands, sand areas, saline soil areas, karst hillsides, marches and bogs) were not used by intensive agriculture and by industry either, so infrastructure developments also neglected these areas. These areas were left in their original state, and now they are the core areas of nature protection. In the mountainous areas the extraction of raw materials was stopped, forestry companies are switching to quasi-natural forest management – this way the valuable hilly and mountainous habitats could also be preserved.

The preservation of the natural values, however, also requires sacrifices on the side of the local population: the relative scarcity of jobs (e.g. due the closedown of mining and processing industry activities). More difficult accessibility is also a problem for the local community, but it is also a barrier to the development of tourism to some extent. Some segments of ecotourism (the dedicated ecotourists), however, definitely prefer hardly accessible places where they can almost certainly find quasi natural conditions and the feeling of being far from civilisation.

The Hungarian national parks (with the exception of the Bükk NP) and a part of the protected areas are mosaic-like in space, and many of these areas can be found in economically backward regions of the country, dominated by small villages. The tourism-related development of the areas rich in natural values and worth presenting to visitors often has very significant impacts on the development of their regions too. The initiators and later the responsible organs of the economic development of such areas are either national park directorates or non-governmental organisations dedicated to the objectives of ecotourism. Good examples for this can be found in the Őrség and the Aggtelek National Park, in the landscape protection area of Szatmár-Bereg and in the Vértes mountains, where the tourism development – and the subsequent general development – of the area was launched by the national park directorates or the organisations of the nature parks. This role is later taken over by the TDM organisations – which is an ongoing process –, and in such cases the national park directorates and nature park organisations can become members of the TDM organisation.

4.4. Spatial relevances of ecotourism

The Hungarian flagships of ecotourism, the national parks and other protected areas have the special political geographical feature that some protected areas belong to several administrative areas, they are “shared” by several counties, planning-statistical regions or even tourism regions. This has a positive impact on the demand
for ecotourism, on the one hand, as certain areas may be part of the supply of several regions, but it may also cause difficulties, on the other hand, as developments – and even operation processes – require very complex reconciliations and negotiations. The territory of the Hortobágy National Park e.g. is shared by four counties, two planning-statistical and two tourism regions; in addition, areas of the selected holiday region of the Tisza Lake belong to the territory of the national park.

5. The connection of ecotourism to other tourism products

Ecotourism is an excellent segment to mutually complement and intertwine with the services of cultural and heritage tourism, rural tourism, and active and health tourism. The social responsibility taken by the organisations of ecotourism must also be manifested in conveying the environment- and health conscious way of life to ss wide as possible layers of the society.

The Hungarian supply of ecotourism may be enriched by the creation of joint complex programme packages worked out with other tourism segments. Ecotourism needs this, on the one hand, because as we could see from the findings of the survey made with the Hungarian population, there is a very narrow layer of people in Hungary who consider natural attractions as their primary motivation to travel. On the other hand, ecotourism supply may complement the supply of a region, ecotourism destinations may be parts of bigger tours, also, ecotourism offers special, unique programmes attractive for smaller segments (e.g. photography tours, wildlife watches, adventure tours).

5.1. Active tourism

Certain active tourism activities may be closely linked to ecotourism. The ecotourism strategy also discusses “eco-active” tourism, i.e. cycling, walking and water tourism as possible means for environment friendly movements. By 2010 the development strategy of bicycle tourism of Hungary was made, whose implementation will offer good infrastructure conditions for ecotourism developments too in some regions. The Tisza Lake rightly uses the slogan of being the “ecotourism island of Hungary”, because in the territory of this tourism region practically all attractions and service are accessible by environment friendly transport, by bicycle or on water. The network of bicycle roads in the Szigetköz also contributed to the ecotourism developments of the area. Where allowed by the conditions of the area, study paths manageable by these means of transports are established: such as the Egyek-Pusztakóc bicycle study path in the Hortobágy National Park, or the Vízi Rence (Water Utricularia) study path in the Fertő-Hanság National Park.

The improvement of the possibilities of public transportation contributes to the environment friendly operation, which is a basic principle of ecotourism. The tourist friendly attitude of public transport increases the number of passengers, on the one hand, and may also increase the number of arrivals to eco-destinations, on the other hand. Public transport is a specifically cheaper means of travel, which is available also for those who cannot afford to have a car. Transport companies, however, are in a difficult situation, because they have to serve the demand of local communities for their everyday movements. A possible solution in bus transport in some areas is summer seasonal timetable specifically designed for tourists. Some special, unique means of travel – e.g. the small trains – may be parts of the ecotourism products, due to the adventure of the nature of transport. A unique programme is the Görülnő (‘rolling’) study path in the Children’s Railway (Széchenyi Hill – Hűvösölgy) (http://www.ipolyerdo.hu/index.php?op=category&id=004003002), and the Libegő (Chairlift) study path (János Hill).

5.2. Rural and agrotourism, the marketing of local products

Ecotourists indirectly may revive local handicrafts, and they also may have a favourable impact on arts. In the green shops of the exhibition places of nature protection, the sales of the local handicrafts products may enlarge supply, on the one hand, and may contribute to the support of the local community, on the other hand. In the visitors centres locally made products should be sold, and in catering facilities local food products should be preferred. The latter is allowed by the new legal regulation which is much less strict than the previous one: Decree No. 52/2010. (30 June) of the Ministry of Agriculture and Rural Development no longer requires small-scale producers to meet unrealistic hygienic and processing criteria that made their activity impossible for many years, or made them sell their products illegally. The protection of authenticity should be safeguarded and
maintained by trademarks; the ministry responsible for rural development and the national park directorates already have initiatives in this respect. Local products – especially processed meats like sausages, salamis, hams etc. – are provided with sign bearing the logo of the national park.

The sales of local products and the work of local producers are assisted in some regions by non-governmental organisations. Such an initiative is the local product database by the Magosfa Foundation (http://www.magosfa.hu), or the Living Tisza trademark and marketing system of the Living Tisza River Association (http://www.elotiszaert.hu). The positive impacts of ecotourism can also be observed on folk traditions, and historical or religious holidays. The interest of the ecotourists may help preserve, in fact, often revive the traditions and holidays. Ecotourists also have a positive impact on local cultural programmes, because they need these events, they actively participate in them and their expenditure promotes the survival of local culture (Photo 5).

Photo 5: Visitors to the Fürkész study path in Jósvafő are treated to potato ‘lángos’ (a Hungarian food speciality, deep fried flat bread) Photo by Erzsébet Pénzes

Other services of rural tourism closely related to ecotourism are private accommodations. Rural accommodations are important parts of the supply of ecotourism in a region from several aspects:

• in space they are connected to the locations of ecotourism, to rural regions;
• if tourists visiting natural attractions and the related cultural sights use local accommodations, a basic criterion, i.e. the support of the local community is already satisfied;
• rural accommodations fit into the image of ecotourism, coming from their character and structure;
• accommodations and ecotourism services can collaborate and mutually advertise each other;
• rural accommodations are small capacity accommodations, which is also a basic principle of ecotourism.

5.3. Health tourism

Among the seven programmes of the New Széchenyi Plan (http://www.ngm.gov.hu/data/cms2068241/uj_szehenyi_terv.pdf) the first one is on the development of health industry, including health tourism. For the development of health tourism, however, a basic condition is healthy environment, the diversity of the natural and landscape endowments, their preservation and sustainable use. If the conditions of ecotourism are also improved in connection with the development of health tourism, we make
a more effective step to improve the living conditions of the domestic population and to disseminate the importance of a healthy way of living. This perfectly fits into the concept that includes rural development and green economic development, i.e. programme 2 in the New Széchenyi Plan.

The development of spas, which is a trend now in Hungary, can be reinforced by the ecotourism supply, the natural heritage of the respective regions.

6. The practice of product development

From among the participants in ecotourism, only a small proportion can be considered as consciously acting tourists maximally taking sustainable tourism into consideration; a large part of the participants in this kind of tourism also show the mass tourists’ habits and negative behaviour. This means that during the practice of developments the needs of modern consumer society must also be taken into consideration. Infrastructure facilities (e.g. visitor centres, resting places, accommodations) must also serve the needs and satisfaction of the visitors. Where developments of such character and quality are not allowed, projects designed for conscious tourists must be implemented. Tourists participating in ecotourism are mostly family people, which means that a special attention must be paid to family friendly developments.

The development of ecotourism has to consider, in addition to the aspects of nature and environment protection and the market, other basic principles of ecotourism, i.e. the involvement of the local community, the support of the local economy, environmental education and the effective implementation of the exhibition of values. An ecotourism service or product is only credible if all these conditions are met. This all can be realised by the involvement of the local labour force, the promotion and sales of local agricultural and handicrafts products, or the cooperation with local accommodations. Exhibition places must be created in a way that the information transferred should also be an experience, for which a wide range of interpretation techniques must be used.

Emphasising the importance of ecotourism and its role in rural development, regional tourism development strategies feature ecotourism and the development of its conditions as a selected product.


1. Balaton Region: the long-term objective of the tourism development concept of the region is the creation and development of a sustainable but also competitive tourism. Besides these long-term objectives, a further priority is the protection of water and environment. Strength of the region is the authentic beauty of the landscape and the villages, the diverse natural and cultural attractions, and the Balaton Uplands National Park (http://www.bfnpi.hu). The existence of these conditions offer excellent opportunities for the introduction and development of ecotourism. The tourism demand of the Lake Balaton, furthermore, is a potential demand for the hinterland of the lake, which may also be used by ecotourism developments. The operational plan of the strategy contains the creation of complex new tourism products, mentioning, among other products, ecotourism as a product to be developed. The strategy says that in the 2007-2013 period a total of 5,000 million HUF should be spent on the development of ecotourism.

The utilisation of these endowments was alleviated by the establishment of the Salföld Nature Protection Farm (http://www.kali.hu/salfoldmajor/), the organisation of walking tours in nature, the opening of study paths and visitor centres. In this development cycle the Lavender House Forest School and visitor centre in Tihany will be opened, and the visitor friendly development of the Buffalo Reserve of Kápolnapuszta will also be made.

2. Budapest–Central Hungary Region: This strategy, taking into consideration the statement of the NTDS (National Tourism Development Strategy), sets as an objective the creation of “chains of experience”, among other things. One element in a chain of experience is the “inclusion of protected areas in tourism”. The demand for unique and special products is increasing in the competition among attractions, so the region puts emphasis in its development plans on the development of unique products. A possible element for the enlargement of ecotourism is e.g. the exhibition of special natural phenomena, or the featuring of rare plant species, a potential location for which is the Damube-Ipoly National Park (http://www.dinpi.hu). A project already implemented is the Study Centre of Királyrét, offering both programme and accommodation for hikers fond of nature and interested in nature protection.

3. North Hungary Region: a selected tourism product category in this region is ecotourism. An objective specified in the development strategy is the continuous maintenance of the hiking tracks, the construction of resting places and lookout towers and the renovation of the already existing ones. A map of the study paths of
the region has been made, and the eco-village of Gömörszáló (http://www.ecolinst.hu) can serve as an example to be followed: it has been realised as a tourism development taking sustainable development into consideration. Also, tourists interested in ecotourism find in the region over 1,000 kilometres of designated hiking trails and study paths, cliffs of picturesque beauty, caves and national park exhibition places (http://anp.nemzetipark.gov.hu). For all segments of ecotourism, potential ecotourism bases are the visitor centres in Ipolytarnóc and Jósvaúfö, which were established with the consideration of both the principles of ecotourism and the market factors.

4. North Great Plain Region: in matters of ecotourism, the Hortobágy National Park (http://www.hnp.hu) is of utmost importance, because this was first and is still the largest national park in Hungary, and also part of the world heritage. For the implementation of the development programme, the following objectives were defined: the assessment and physical planning of ecotourism locations, promotion and support of the cooperation of national parks, creation and development of high level ecotourism supply, e.g. by the establishment of accommodations and exhibition places, the organisation of eco-lifestyle camps, the construction of activity houses, or the professional training of guides. In the framework of this was the new visitors centre built in the village called Hortobágy, the small train around the fisheries re-started and is the Pusztá Animal Park safari now being implemented. Plans also include the theme tour of “old-style inns” in addition to the already existing study paths. A private initiative, the Hortobágy Bird Hospital fits perfectly into the activity of the region.

5. South Great Plain Region: the clean environment of the region, the dedication and professionalism of the inhabitants was the guarantee of the ever growing importance of ecological animal husbandry and plant cultivation. For the development of eco-farming a number of initiatives were made in the region, good examples for which are the Titok-ér eco-park in Körösladány or the Homokhátság (Sand Hills) Bio-farm in Kerekegyháza Sample Farm (http://www.kamra-tura.hu). Other potential ecotourism locations are the Körösvölgy (Körös Valley) Visitor Centre in Szárvas (http://kmnp.nemzetipark.gov.hu/index.php?page=menu_804) and the Dévaványa Great Bustard Reserve at the Réhely Visitor Centre (http://kmnp.nemzetipark.gov.hu/index.php?page=menu_805), expecting treating guests with diverse services and programmes.

The development strategy does not refer to ecotourism as a product per se, but the development of equestrian and rural tourism is going to be done in the direction of ecotourism. The region can join ecotourism by agricultural products and the introduction of the cultural heritage of the folk traditions.

6. South Transdanubia Region: One of the four tourism products to be developed selectively in South Transdanubia is ecotourism. The Dráva River is an outstanding natural value, as is the national park with the smallest territory in Hungary: the Danube-Dráva National Park (http://www.ddnp.hu). One programme element of ecotourism supply is walking tours, for which the conditions are favourable in the region. The physical state of the walking paths, however, must be improved, together with the related infrastructure. The propaganda of walking tours (e.g. by internet advertisements, catalogues etc.) is also an important task, featured in all tenders submitted by the region. An idea already implemented in the area of the National Park is the development of the Dráva Gateway Exhibition Place and the Historical Memorial Place of Mohács, offering several opportunities for all generations to get to know the natural and cultural historical values. An extraordinary attraction is the programme offered by the Starry Night Reserve of Zselic.

7. Middle Transdanubian Region: The tourism development strategy of the region set as an objective the development of the touristic use and exhibition of national parks, nature parks and nature protection areas. Popular destinations of ecotourism in the region include the mountains (Vértes, Bakony and Gerecse); these attract visitors with hiking trails and study paths, in the first place. The House of Bakony Forests in Bakonybél, the Pangea House in Pénzesgyőr are regional centres for the introduction of forest schools and environmental education, and also for the show of bio-farming. An excellent example for the connection of ethnic minorities, local community and tourism and also for the introduction of quasi natural farming is the Vértes Nature Park (http://www.vertesinaturpark.hu), offering to visitors a broad range of programmes and service supply to feature the natural and cultural sights of interest in the Vértes area.

8. West Transdanubian Region: The Fertő-Hanság National Park (http://www.ferto-hansag.hu) and the Órség National Park (http://onp.nemzetipark.gov.hu) are popular ecotourism destinations. The first nature park of Hungary was established in this region in 1997, this is the Írottó Nature Park (http://www.naturpark.hu), dealing with tourism development, marketing and environmental education. Its activity serves the purposes of ecotourism. The objective of the developments, in addition to the provision of sustainability, is the creation of habitats, exhibition places and study paths, the reconstruction of the small train network, and the introduction of traditional farming. The Bechtol István nature protection visitor centre in Köszeg, managed by the Órség...
National Park, was awarded the title “The ecotourism showplace of the year” in 2010, because the structure of the building is visitor friendly, and by interpretation it gives to all generations enjoyable environmental education. The building is natural and also modern, meeting the requirements of modern times (Photo 1).

9. Tisza Lake Region: The main aim of ecotourism in the region is to finish the Eco-centre of Poroszló (http://www.poroszlo.hu/hu/okoturizmus.php), and the development of exhibition places and study paths. The Eco-centre is a unique development in Hungary, whose objective is the creation of a centre and nature house in which tourism, nature protection and education are related to each other. The Centre unites and develops into a complex programme the individual ecotourism elements in the region. In addition, two well built out study paths have been established, one in the east and one in the west side of the Lake. The ecotourism developments of the privately owned Szabics Port (http://www.szabicskikoto.hu) are also worth mentioning.

7. Special features of ecotourism researches

While it is obvious that the interest in nature increases and there is also a growth in ecotourism at international level, it is very difficult to measure the impacts of ecotourism, because of the lack of reliable statistics. Of course this problem is related to the fact that ecotourism is not comprehended the same way by everybody.

Researches related to ecotourism include measurement of the visitors’ satisfaction, certain landscape assessment methods (like the examination of Szilassy, P. in the Káli Basin), and the measurement of the impacts of tourism. On the basis of visitors’ needs, the range of attractions and services can be further developed and the supply of tourism experiences can be transformed. The existence of an environmental monitoring system also means an active form of nature protection, thus the preservation of the resources.

Prior to the task force for ecotourism mentioned in Chapter 6, no comprehensive research had been conducted on the demand of ecotourism in the nature protection areas of Hungary. In the framework of the green tourism campaign year of the Hungarian Tourism Inc. in 2006, a representative survey was made that gave us some information on the attitude of the Hungarian population to nature. The measurement of the satisfaction of visitors was far from being systematic, too. As a continuation of the green tourism campaign year, the ministry then responsible for environmental issues and the Hungarian Tourism Inc. launched a single questionnaire survey for all national parks, asking the visitors of the nature protection showplaces about their opinions. The national park directorates can define on the basis of the entrance tickets that they sold, how many visitors the showplaces received, but there are no credible data on the number of visitors outside official visitor places. The number of visitors, however, would be necessary to define, among other things for the definition of the carrying capacity of the areas.

Another initiative of the task force was in 2010 the survey of the impacts of tourism in natural areas, in ten locations in the national parks. Regular impact analyses create the foundation to implement tourism developments in a sustainable way, without harming the natural heritage. The definition of the methodology of data recording and processing, and the use of a single methodology allow rapid and considerate decision-making. On the basis of the information collected it is possible to define the carrying capacity of the area, the number of visitors to an area can be optimised. A single data collection methodology was made for the survey, by which the changes in the selected area can be measured in an objective way.

The communication of the findings of the regular data collection contributes to increasing the value consciousness of visitors, on the one hand, and improving the credibility of the communication, on the other hand.
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8. fejezet - Andrea Máté - Géza Szabó: Wine and gastronomy tourism

1. Tourism (travel) historical/social historical/cultural historical preliminaries of the product

1.1. Concepts of wine tourism and wine routes and their characteristics in Hungary

Wine, its culture and its production areas are all tourist attractions. If it is used as an agricultural product with auxiliary information service, demonstration and sales promoting wine tasting sessions, then it is a product of agrotourism; however, if wine and its production is seen as a tourism product integrating the settlements and producers of a region or wine producing area and transforming them into a community with a single will, a product that also introduces the traditions and cultural attractions of the settlements and communities in addition to the demonstration of the agricultural products and that is suitable for their integration at regional level, then wine and its production can be taken as the foundation of a regional theme route.

- A special solution of agrotourism: - method for the demonstration and sales of local products
- Touristic supply at the respective producer (plant): - wine show and wine tasting, - related catering, - in the better case accompanied by wine sales

- Local product based theme route connecting settlements and regions
- Grapes and wine culture as a region-specific programme is featured: - diverse and varied auxiliary programme offer - the programme is also related to the natural values, monuments, municipal traditions and local culture in the region

Wine routes are spatial tourism products and community creations with the cooperation of all stakeholders – from private persons through enterprises to municipal governments – who are interested in the touristic development of the respective region and in strengthening the wine region, namely

- Original producers, businesses and organisations dealing with grapes and wine;
- Those engaged with catering, gastronomy, and the organisation of tourism;
- “ Owners” of the attractions: organisers of events, operators of museums, handicraftsmen, local producers, educational and traditionalist institutions and organisations;
- Those engaged with the accommodation of guests, from rural hosts through boarding houses right to hotels;
- Local and regional professional and non-governmental organisations; and
- “Masters” of the settlements, i.e. municipal governments and their institutions.

The Hungarian national representation of wine routes, the Association of Hungarian Wine Routes [1] also defined the content of this concept. In their view wine routes are complex touristic products that have specific, unique supplies, operate as organised units; their access to the market is assisted by community marketing, their services are qualified and thus meet the international requirements. The definition emphasises the close interrelation of tourism, local culture and wine production and their significance in rural development, and also the selected role of non-governmental organisations in the coordination of the local stakeholders.

Wine routes as parts of the touristic supply became recognised in Hungary in the last 10-15 years, only. The first Hungarian route, the Villány-Siklós Wine Route was established in Baranya County, integrated into the wine route development programmes primarily designed to support the EU wine routes by the Assembly of European Wine Regions (AREV, Assemblée des regions Européennes Viticoles). The Villány-Siklós Wine Route Association was founded in 1994, whose membership includes, in addition to municipal self-governments and local inhabitants, also entrepreneurs. The wine route defined as their objective of operation “the creation of the
wine route of the wine producing area, strengthening of the specific image and landscape of the wine route, the promotion of wine tourism and the full utilisation of the development potentials lying in the two-thousand year old wine culture”. The three pillars of the wine route programme implemented with the support of the Phare Fund are as follows: a qualification system of supplies and programmes; touristic information system; and community marketing activities. The programmes of the established wine route are of course closely related to wine: demonstration of the wine production and viticulturist traditions, promotion of handicrafts activities connected to cellars and wines, wine tasting and wine purchase in the qualified cellars of the wine route, catering, cellar programmes and holidaymaking at winemakers. This offer is enriched by auxiliary programmes:

§ rural tourism, village programmes,
§ gastronomic programmes,
§ hiking programmes,
§ cycling and equestrian programmes,
§ different hobby activities,
§ cultural and arts programmes,
§ events and local holidays,
§ religious tourism etc.

Characteristics and touristic types of Hungarian wine routes

Knowing the individual features of the Hungarian wine producing areas, it is hard to imagine that each wine route of all wine producing areas the create offers of similar character. The differences among the wine producing areas in the landscapes, production places and tourism should be featured with adequate touristic supplies and the designation of unique wine routes. Fortunately there are several examples for this to be followed in the European wine routes.

The council of European Wine Regions (CERV) operating as the professional organisation of AREV, with regard to the wine routes with several decades of experiences in Europe (Rhine-Pfalz, Alsace), and the wine routes developed since 1992 with the Dionysos programme of the European Union (including the Alentejó and Porto regions, Sicily, Styria, Catalonia, Lombardy), differentiates the following types of wine routes:

1. **Open wine route**, a loose network of wine tasting facilities. Units prepared for wine tasting and catering in a touristic region.

2. **Thematic wine route**. Wine tasting facilities are complemented by special programmes. Most frequently related products are culture, nature (protected areas with special values), and gastronomy.

3. **Classic wine route**. A designated, manageable route, “wine circuit” with qualified wine tasting and sales facilities, restaurants, accommodations, sights of interest and programmes for the guests. Visitors are directed to the service in demand by information signposts.

Adapting this classification to the Hungarian circumstances (G. Szabó – E. Sarkadi 2006), wine routes in Hungary can be of the following categories:

**Open wine route**: wine tourism offer of wine producing areas consisting of separate production places located relatively far away from each other. In open wine routes, the possibility of development is the creation of rural tourism network which, through the demonstration of the area and the wines, can bring about the improvement of the recognition of the wines. Besides the specific programmes of wine tourism, these wine routes can offer rural tourism, agrotourism and cultural programmes whose development can be the key to success by the activation of local inhabitants and their integration into the wine route.

In South Transdanubia such an open wine route is the Tolna Wine Route, but several wine routes of North Hungary are also moving into this direction of development. This can definitely be a development “way” for the wine routes in the Great Hungarian Plain.
Thematic wine routes require more concentrated enological and touristic supply, including major tourist attractions to which wine tourism services are worth connecting.

Wine producing areas suitable for the establishment of thematic wine routes can integrate the wine route services to the already existing and popular attractions, mutually reinforcing each other. In these wine producing areas the fame of the wines, wine production culture and the related catering services are still in need of development, in which touristic programmes can be of great value. This category includes the recently established South Balaton Wine Route with its developing supply or the Bóly-Mohács “White Wine Route”. Besides the existing and cooperating touristic supplies recognised by the market we also find in these wine routes wines of good quality, with considerable development potential. By the integration of these both fields, i.e. tourism and wine production can win.

The third type of wine routes are classic wine routes or wine circuits. This category can be found in renowned but geographically small wine producing areas with an established tourism offer like the Villány-Siklós Wine Route, the Hungarian archetype of wine routes, or the Badacsony Region Wine Route and the wine route of the Sómló Hill. The facilities and settlements in the geographical proximity of each other allow the systematic managing (walking) of the area. The tourism developments in the Szekszárd and the Sopron wine producing areas will result in the birth of such “wine circuits”. This development direction is a realistic possibility for wine producing areas that have a high quality enological sector and wines of international recognition, for wine producing areas where wine producers have realised the possibility lying in wine tourism and have joined the wine routes as service providers themselves. Several of these producers have created their supply, in addition to wine tasting and sales, in gastronomy and even in accommodation services (by the establishment of family-run boarding houses) (Szabó, G. 2006, 2003a, b, 2002, 2001, 1995).

[1] Magyar Borutak Szövetsége, MABOSZ

1.2. The foundations of Hungarian wine culture

Viticulture and wine culture of Hungary go back to two thousand years (Kollega Tarsoly, I. 2000). The varied environmental conditions of the Carpathian Basin and the impacts that Hungary received during history make Hungarian wine culture diverse, which, on the basis of its endowments, could be a competitor of French wine culture (Appendix 1). There are common features in the development of the Hungarian wine regions, but each wine region has their own special development features as well (Tables 1 and 2).

Table 1. Main periods in the historical development of Hungarian wine culture until World War Iű

<table>
<thead>
<tr>
<th>Period</th>
<th>Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heritage from the Roman Times (Pannonia)</td>
<td>· Emperor Probus supports the plantation of vines in Transdanubia · Viticulturist tools, grape seeds, and stone coffin with grapes motifs from archaeological excavations (for example Szekszárd), wall paintings with grapes motifs from ancient villas</td>
</tr>
<tr>
<td>Time of the great invasions, the Hungarian conquest</td>
<td>· Hungarians, settling down in the territory of the Khazar Kaganate, get to know viticulture and wine production (around 600 A. D.) · Word of Turkish origin in Hungarian language: szőlő (grape), bor (wine), szűr (sieve), seprő (wine lees), ászok (skid). · The conquering Hungarian tribes took over and continued viticulture in the Carpathian Basin.</td>
</tr>
<tr>
<td>Time of the rulers from the Árpád Dynasty</td>
<td>· King I. (Holy) Stephen integrated Hungary into Christian culture, promoting the spread of viticulture and wine culture. · Settlers coming from abroad, the so-called hospeses (Germans, Walloons, Italians) planted vines on forest clearings. · The role of the church (episcopacies and abbeys) in medieval viticulture and wine production (production of “wine for the masses”) · Literate priests arriving from the western and southern countries could disseminate knowledge on grapes and wine, especially on church</td>
</tr>
<tr>
<td>Period</td>
<td>Events</td>
</tr>
<tr>
<td>------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>The Renaissance era</td>
<td>Hungarian students studying at foreign (Italian, Polish, French, German) universities brought new skills and practical experiences. During the reign of King Matthias strong Italian impacts can be felt in raisin making; this is the time with evidence for the appearance of red wine grape sorts.</td>
</tr>
<tr>
<td>Time of the Ottoman Rule</td>
<td>Destructive impacts of the Ottoman occupation: vanished Szerémség wine region. In the Tokaj region the sort called Furmint appeared, and the making of aszú wine started. The spread of the red wine grape called Kadarka brought from the ‘Rac’ (Serb) refugees from the Balkans, and of red wine production in the area of the Ottoman Hungary</td>
</tr>
<tr>
<td>Baroque era</td>
<td>The settling down of Swabian people, with new sorts of grapes (Blue Franc, Zweigelt) and viticulturist methods (e.g. the use vine stakes). Training of the practice of viticulture and wine production in the Georgikon of Keszthely founded in 1797. On the influence of Sámuel Tessédik, the loose sand soils of the Great Hungarian Plain were fixed by the plantation of vine.</td>
</tr>
</tbody>
</table>

Source: edited by Máté, A. after Kozma P. 1995, Máté A. 2007a

Table 2. Main periods in the historical development of Hungarian wine culture after World War I
1.3. The concept of gastronomy and its relevance in tourism

Gastronomy is a word of Greek origin; it is a concept with a narrower and a broader interpretation. Its primary meaning is delicacy, the in-depth knowledge, the sophisticated joy of foods and beverages, and the art of eating. Also, it may mean chef arts, culinary arts, in a broader sense it also involves the art of laying the table and servicing guests, the culture of eating and actually everything that is related to eating (Tusor, A. – Sahin-Tóth, Gy. 2006).

Hungarian gastronomy is part of the country’s intellectual and cultural heritage. The Hungarian and ethnic gastronomic traditions which are diverse across the different regions may give the uniqueness and strength of the supply of the rural areas. Getting to know regional gastronomy promotes the touch of tourists and local inhabitants. Tourism built around Hungarian gastronomy is a possibility to strengthen the good will of the Hungarian catering industry, enhance the hospitality of the local population and revive the regional traditions, almost forgotten folk traditions, economic holidays and the making of region-specific foods. Programmes and events related to gastronomy are not limited to the main season; thereby they decrease the temporal and spatial concentration of touristic season and lengthen the duration of stay (Fehér, I. – Körödi, M. 2008).

1.4. Birth of the Hungarian gastronomy

The Hungarian eating culture and gastronomy are closely related to the history of the Hungarian nation. Since the time of the great invasions, several impacts have made their marks on Hungarian cuisine. Hungarian cuisine developing over the centuries is known all over the world for the variety of ingredients and cooking methods, which makes it unique and popular with guests (Table 3) (Bádonyi, M. 2009). To the contrary of the stereotypes living in the tourists’ minds – such as goulash, spicy, hot and fat dishes, spicy paprika garlic, onion used as ingredients – the offer of Hungarian cuisine is much more varied, of which Hungarians are deservedly proud (Appendix 2).

Table 3. Main periods in the development of the Hungarian gastronomy

<table>
<thead>
<tr>
<th>Period</th>
<th>Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time of the great invasions</td>
<td>· Hungarians have a half-nomadic way of life: fishing, hunting, grazing animal husbandry · Impacts of Bulgarian and Turkish cuisine · Hungarian words from this period: hal (fish), öz (roe deer), vad (game), nyúl (hare), keszeg (bream), sügér (perch), fogoly (partridge), fajd (heath-cock) · Roasting on stone plates and grilling on the spit, use of outdoor pots for cooking · Drying and smoking of foods: dried pastry and meat · Spices: salt, honey, tarragon, savory, garlic, dill, sage · Cereals gown: barley, millet, wheat.</td>
</tr>
<tr>
<td>and the conquest</td>
<td></td>
</tr>
<tr>
<td>Time of the rulers from the</td>
<td>· Impacts of Byzantine, German and Italian cuisine</td>
</tr>
<tr>
<td>Árpád Dynasty</td>
<td></td>
</tr>
<tr>
<td>Period</td>
<td>Events</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Renaissance times</td>
<td>· Italian impacts in the royal cuisine of King Matthias:</td>
</tr>
<tr>
<td></td>
<td>· Spices mediated by Italy: ginger, nutmeg, cinnamon,</td>
</tr>
<tr>
<td></td>
<td>· peppermint, anis, cane sugar sweets for making roast dishes and</td>
</tr>
<tr>
<td></td>
<td>· sauces · Sweets made from cane sugar, anise candies,</td>
</tr>
<tr>
<td></td>
<td>· marzipan of Italian origin · Spread of two-branch fork</td>
</tr>
<tr>
<td>Time of the Ottoman rule</td>
<td>· The split of Hungary into three parts brings an end to the</td>
</tr>
<tr>
<td></td>
<td>· New products brought by the Turks: maize, coffee, paprika, tobacco</td>
</tr>
<tr>
<td>Baroque period</td>
<td>· German and French impacts: tablecloths, china dishes,</td>
</tr>
<tr>
<td></td>
<td>· cutlery, drinking glasses · New raw materials: coffee, tea,</td>
</tr>
<tr>
<td></td>
<td>· chocolate, rice, maize, sunflower oil, potato, tomato, red pepper</td>
</tr>
<tr>
<td></td>
<td>· (around Szeged and Kalocsa)</td>
</tr>
<tr>
<td>The Reform Era</td>
<td>· Development and strengthening of Hungarian catering industry:</td>
</tr>
<tr>
<td></td>
<td>· spread of confectionaries and cafés · Austrian impact: pork lard</td>
</tr>
<tr>
<td></td>
<td>· for frying meat, frying in breadcrumbs · Widespread penetration of</td>
</tr>
<tr>
<td></td>
<td>· stew base: pork lard, onion of Makó, red pepper</td>
</tr>
<tr>
<td>Time of the Austro-Hungarian Monarchy</td>
<td>· József Marchal Sr. (of French origin) renews Hungarian</td>
</tr>
<tr>
<td></td>
<td>· Gundel dynasty: world famous restaurant and cookbook; József Dobos C.: Dobos Cake</td>
</tr>
<tr>
<td>Between the two world wars</td>
<td>· During world wars catering industry declined, shortage</td>
</tr>
<tr>
<td></td>
<td>· of food, introduction of food coupons · World economic crisis:</td>
</tr>
<tr>
<td></td>
<td>· unemployment and inflation set back catering industry · During</td>
</tr>
<tr>
<td></td>
<td>· World War II buildings, equipment and tools annihilated</td>
</tr>
<tr>
<td>Socialist era</td>
<td>· After World War II catering industry was nationalised in</td>
</tr>
<tr>
<td></td>
<td>· Hungary · County or city catering companies were</td>
</tr>
<tr>
<td></td>
<td>· founded · Hotels were used by governmental bodies or</td>
</tr>
<tr>
<td></td>
<td>· converted into homes · Catering in canteens was supported</td>
</tr>
<tr>
<td></td>
<td>· Uniform catering facilities, lack of unique image</td>
</tr>
<tr>
<td></td>
<td>· In the 1960s catering facilities were re-opened, especially</td>
</tr>
<tr>
<td></td>
<td>· for foreigners · 1970s: drink bars, night clubs, self-service</td>
</tr>
<tr>
<td></td>
<td>· restaurants were opened · In the 1980s private restaurants</td>
</tr>
<tr>
<td></td>
<td>· and catering facilities were allowed to operate</td>
</tr>
<tr>
<td>Since the systemic change</td>
<td>· Privatisation: by the 1990s most catering facilities are</td>
</tr>
<tr>
<td></td>
<td>· privately owned again · Opening and penetration of fast</td>
</tr>
<tr>
<td></td>
<td>· food restaurants, most of them foreign owned · In 1992 Gundel</td>
</tr>
<tr>
<td></td>
<td>· Restaurant started to operate again · Growing popularity of</td>
</tr>
<tr>
<td></td>
<td>· gastronomic, foundation of gastronomic theme routes</td>
</tr>
</tbody>
</table>


2. Elements of supply

2.1. Attractions

2.1.1. Wine growing areas and wine regions in Hungary

Presently there are 22 wine producing areas in Hungary (Figure 1), whose names and the settlements belonging to them are regulated by decrees of the Ministry of Agriculture and Rural Development. According to a HCSO survey in 2009, Hungary now only has a total of 83,500 hectares of vineyards, which is a 9% decrease compared
to the figure of 2001 (Appendix 3). The economic opportunities and market challenges of the last twenty years affected all wine producing areas in Hungary, but significant regional disparities evolved in how successful they were in using their endowments and meeting the domestic and international expectations. Some of the wine producing areas (Villány, Szekszárd, Eger, Tokaj) have become successful by now even in the international arena, their achievements are justified by the increase in their territory, the growing number of viticulturist businesses, the awards won in wine competitions and the market performance. The other part of the Hungarian wine producing areas (and they are the majority) are lagging behind, which is reflected by the decrease in their territory, and the problems of the quality, market performance and sales.

The organisation of wine regions was allowed by the Act No. XVIII of 2004, which called for the creation of wine regions as bottom-up organisations initiated by the wine producing areas. The wine regions that have officially been founded since then are the Danubian, the Balaton and the Pannon Wine Region (Figure 1). The birth of further wine regions is expected, but their territorial designations and names are quite uncertain now, which is also indicated by Figure 1 (Máté, A. 2009, 2007a, b).

The wine production of Hungary is dominated by white wines, because in 70% of the vineyards white grapes are grown. The major red wine producing areas in Hungary are Eger, Sopron, Szekszárd and Villány. The most typical sorts of grapes in Hungary are Italian Riesling and Blue Francs, although with production areas decreasing in size. After the systemic change, the market demanded an increased proportion of world sorts (Chardonnay, Sauvignon Blanc, Rhine Riesling, Cabernet Franc, Cabernet Sauvignon, Pinot Noir, Merlot). In
the last years the typical local and regional sorts (Kadarka, Cifrándli, Linden Leaf, Kéknyelű – “Blue Stem” –, Furmint, Cserszeg Spicy, Irsai Olivér) have been growing in production size, by which Hungary can keep its unique offer of wines. The world famous centre of dessert and aszú wine making is the Tokaj wine producing area. The amount of wines produced in Hungary has considerably decreased, from 450-550 million litres to only 310–350 million litres per year, influenced, in addition to the weather, by the decrease in the size of the vineyards (Appendix 3).

The wine producing areas and wine regions abound in attractions (Máté, A. 2009, 2007a, b):

- **Favourable geographical and climatic endowments of the wine producing areas:** southern slopes or transformed hillsides rich in pleasant sunshine, diverse sorts of grapes, well-kept vineyards, the centres of wine production. The special atmosphere attracts visitors (Michalkó, G. – Vizi, I. 2006, Rohály, G. – Mészáros, G. – Nagymarosy, A. 2004).

- **The cellars and wineries:** in addition to the old press houses, cellars and cellar streets as organic parts of the landscape, visitors are now awaited by modern wine houses as well. The fame, products, reception capacity and accessibility of cellars all influence the number of their visitors. The technology applied in the cellars, the buildings of the processing plants and the peculiarities of the reception place also evoke the interest of the visitors. A high quality catering requires adequate opening hours, and the skills of foreign languages. The staff must be friendly, organised and polite. Cellars must be made accessible to tourists, if necessary, roads and car parking facilities must be constructed (Appendix 4).

- **The wine products:** the quality of wines and the attraction of brand names created by the cellars have been continuously growing, as more and more of them are known by the consumers. The results of wine competitions are given a growing publicity, and although the opinions of wine assessments are subjective (depending e.g. on the taste and health condition of the wine judge, the location etc.), still it is a decisive information for certain target groups. Uniqueness is an important element in tourism, which must be used in wine tourism as well, as wines from the respective years offer novelty and diversity, making it worth returning to the cellars to taste the difference of the years or among the cuvée wines.

- **Wine route:** Wine routes are a guarantee of quality for visitors, because a well functioning wine route offers a wide range of services, programme packages, good accessibility (both physically and virtually), an adequate environment of reception and high quality accommodation and catering facilities (Máté, A. 2006). The first one in Hungary was the Villány-Siklós Wine Route that was followed by a number of other wine routes (Szabó, G. 2006, 2003a, 2003b, 1995).

- **Towns and villages of the wine producing areas:** A dominant role is played by the hinterland around the wine producing area. Both urban and rural spaces can offer a number of values enriching the visits of tourists, depending on their interests (Máté, A. – Pap, N. 2007). The attractions of nearby big cities are their historical past, entertainment facilities and dynamic mood, whereas villages are made interesting by their tranquil and clean environment, village hospitality, traditions and folk arts values.

- **Museum, exhibition, local history collection; historical memories; handicrafts:** In addition to exhibitions featuring former viticulturist and wine production technology, it is also worth including the local history, ethnographic and arts values of the area in the programme for the tourists. Just like development and new technologies are expected in wine production, environment friendly environment, and staff are also becoming more important, together with the application of multilingual information tools and multimedia technology in museums and exhibition places. Castles, chateaus and churches are those historical remnants that have survived the last centuries and make the range of sights of interest more diverse. Several handicraftsmen work in the wine producing areas whose products can be seen as ornaments, dishes or other subjects in the cellars.

- **Events, festivals:** Events and festivals make the touristic supply of an area dynamic and diverse. Events can be extremely diverse: folklore, ethnic traditions, vintage festival, gastronomic, music or arts festivals, or conferences and fairs. Wine may be a dominant element in some types of events, whereas it may have a supplementary role in other sorts. An advantage of events and festivals is that wine producers can more easily introduce their wines to new customers, they may increase their profit. Wine producers are given a chance to establish relationships with the consumers and thereby they can get to know their opinions.

### 2.1.2. Hungarian gastronomic traditions
The unique tastes of Hungarian cuisine have been made by the combined effect of diverse ingredients, the characteristic seasoning and the special kitchen technology procedures.

The dominant characteristics of Hungarian cuisine are as follows (Tusor, A.–Sahin-Tóth, Gy. 2006):

- stew base: the joint use of pork lard, onion and red pepper
- pork as a dominant ingredient
- meat products: Gyula, Csaba and Debrecen double sausages, Pick salami, bacon, goose liver
- frequent use of sour cream
- specific cooking methods: making stew base, toasting, thickening of foods with flour mixed with lard or sour cream
- special spicing procedures: red pepper, onion, garlic, cumin
- soups: spicy fish soup, Palóc soup, chicken soup Újházi art, Jókai bean soup
- high carbohydrate content of garnishings and vegetables
- pastries and sweets: Hungarian pastries made from batter (with poppy seeds, cottage cheese etc.), Rigó Jancsi, Dobos cake, somlói galuska (sponge cake), Gerbaud cake, Rákóczi quark cake, Gundel pancake

Several characteristics of the Hungarian gastronomic traditions can be converted into touristic programmes (TUSOR, A.–Sahin-Tóth, Gy. 2006):

- village wedding party and the related events, e.g. the Sárköz wedding
- baking and cooking in oven, smoking, drying
- grilling on the spit, bacon grilling, ox grilling
- roasting in clay, cooking in pot in open-air
- pig killing, pig slaughter feast
- ethnic gastronomic traditions: Swabian, Székely, Sokác, Serb, Slovak and Romanian

The gastronomy of the Hungarian regions can be accompanied by the following attractions (FEHÉR, I.–KÖRÖDI, M. 2008):

- *Gastronomic events:* A successful part of tourism product development in Hungary are those events and festivals that attract audience “hungry” for programmes at a well selected time of the year, introducing the most characteristic local products, their cooking methods or the local gastronomic traditions. These events evoke the interests of a wide range of visitors in the respective product. The period of their preliminary advertisement and the ex-post events may further lengthen interests in the respective product. Festivals and events, if they are well organised, can gain a market for the given products, increase the everyday demand for them. Annually recurring events, some of which have a large number of visitors now, have a role in strengthening image that should not be forgotten.

It is not an easy task to evaluate the dynamically increasing supply of local product festivals and gastro-festivals in Hungary. The different programme advertisements contain some of these events in rather varied approach and composition. If we select agrotourism related events from the “crop” of the last years, we can register almost 300 events. The attraction of and the number of visitors at festivals are hard to assess, and it is not easier to define their content, either. On the basis of their programmes and content they can be classified into at least four categories:

- *Feasts of local products or crops,* where an outstanding position is held by vegetables (from cucumber to pumpkin) and fruits. It is remarkable that plum is the most popular fruit, several festivals in many regions of Hungary are organised on it!
Cooking festivals of traditional dishes, where the dominant role is played by the approximately 15 fish cooking festivals every year. Looking at this figure only, one could think that the consumption of fish is very widespread in Hungary, although the facts show that the situation is just the opposite!

Cooking competitions that also attract a significant number of visitors from the narrower and in some cases the wider environment, may represent two trends. There are competitions organised on dishes made with special techniques (e.g. grilling) where attraction is, on the one hand, the large number of competing groups, and in the tasting of the dishes, on the one hand. However, we also find competitions organised on special raw materials and ingredients (e.g. games).

Mixed events maybe festivals or events without a clear-cut profile and/or having very diverse programmes. In the diverse profile a special emphasis is placed on keeping traditions, programmes introducing several products, and the combination of beverages and foods. Most of them even integrate music, cooking competition and cultural elements in the programme.

Gastronomic museums and local exhibitions: Local exhibition places can introduce the economic activities, everyday life of a respective area or ethnic group, including cooking and eating habits. Former cooks, tools and pieces of equipment may evoke days gone by. Gastronomic museums, on the other hand, demonstrate the production methods of certain foods and the tools used for making these foods, they are “live museums” in many cases where visitors can participate in the creation of the food product (like in Petrits Honey Cake and Candle Museum in Szekszárd), as well as purchase them, e.g. Paprika Museum – Kalocsa, Marzipan Museum and Confectionery – Keszthely, Dobos Sweets (Chocolate Museum) – Szentendre (FEHÉR, I. – KÓRÓDI, M. 2008).

Gastronomic theme routes: Inspired by the success and wine routes and international examples, several theme routes of gastronomic character have been created in Hungary, such as the Plums Route (in the Szatmár-Bereg region), the Horseradish Route (in the area of Bagamér), the Apple Route (in Vas and Zala counties). These theme routes are built on the small intensity, scattered but diverse attractions of the rural areas. They integrate and convert into touristic programme the agriculture and gastronomy related attractions of the respective regions. Service providers in the theme routes can be businesses making local products (on the Plum Route they may be producers of plums jam, dried plums, plum brandy), gastronomic events, local catering facilities, local accommodation owners, or handicraftsmen (FEHÉR, I. – KÓRÓDI, M. 2008).

2.2. Related touristic infrastructure: the information system of wine routes

For the implementation of a wine route, a basic requirement is to find the communication channels to promote the marketing of the supply, in which the touristic information system plays a primary role. At the first Hungarian wine route, the Villány-Siklós Wine Route, one of the achievements of project development was the system of information signposts and the information office of the wine route in 2007. The system has been enlarged since then, the number of information signs and their content has multiplied, but they basically followed the objectives defined in the development phase.

The touristic information system can be taken as the living connection between the touristic market and the local supply. There are expectations against the system from two sides. Of special significance are the needs of tourists who expect the full exploration and demonstration of all segments of the supply and also want to have enough information to select and use the supply suitable form them. The operators of the wine route, on the other hand, hope to find a market for their supply, using the information system. The system can only meet these two requirements if it can guarantee both availability and accessibility.

The demands can be satisfied by the location of two information systems, which are of different characters but closely related to and mutually complementing each other (Table 4).

The two networks are as follows:

- system of orientation, information and demonstration signs,
- network of interactive information points.

<table>
<thead>
<tr>
<th>Information signs of the Villány-Siklós Wine Route</th>
<th>Tasks of the interactive information points</th>
</tr>
</thead>
</table>

Created by XMLmind XSL-FO Converter.
Signposts orienting to the wine route | Spread of information and propaganda materials
---|---
Signposts marking the wine route | Up-to-date information on the wine route services
Wine route information signposts | Bookings and sales of entrance tickets
Signs introducing the wine route | Sales of souvenirs typical of the wine route

| Table 4. Elements of the information system of the Villány-Siklós Wine Route |
|---|---|
These are the constant elements of the built-out and still expanding information system. They are complemented now by an internet website up to the requirements of these days and by topical web2 applications. The information network still serves as an example to follow for other wine routes, especially in its signpost system.

- pictogram (Appendix 5)
- photo (Appendix 6),


### 2.3. Related touristic suprastructure: catering facilities in Hungary

Gastronomy and wine culture reach guests by the mediation of different catering facilities. They are not only expected to offer high level services today; they must also monitor topical trends, local tourism development objectives, and they should also join in and adapt to the topics of product development, for example by offering the beverages produced by local wine route producers or by treating guests with menu including ethnic specialities in an environment where ethnic minorities live (Dávid, L. – Jancsik, A. – Rátz, T. 2007).

Catering facilities can provide both tourists and local inhabitants with catering services, so the statistical indices of restaurants and other facilities are not only the indices of tourism (Appendix 7). In Hungary there was a considerable growth in the number of catering units from 2001 to 2008. At the end of 2008 there were 56,612 commercial facilities and canteens in operation, although their number had decreased by 1% from the previous year. In 2008, 87.6% of all units operated as commercial catering facilities. Within this category, 23.5% were restaurants, 3.4% confectioneries, while 44.8% were registered as other, non hot kitchens, while 28.2% operated as bars, wine bars, pubs or music pubs. Of all catering facilities, 46% were operated by private entrepreneurs, 50% by businesses, 4% by non-for-profit and other organisations. As regards the breakdown of catering facilities by statistical regions in 2008, the biggest proportion of them could be seen in the Central Hungary Region, where 26.6% of all facilities operated, of which 10% could be found in Budapest and 16.6% in Pest county. The North Great Plain region was home to 14.2% of all units, the other Great Plain region, the South Great Plain to 12.9%. All other regions had 11-12% of all catering facilities. The sales of foods and non-alcoholic beverages increased between 2003 and 2008, while that of the alcoholic beverages, coffee and tobacco products decreased. The turnover of catering facilities continuously grew from 2001 to 2008. Catering industry received revenues in excess of HUF 684.6 billion in 2008, which was a 2.5% growth compared to the previous year. Of all revenues, 87% was realised at commercial facilities (Bodnár, L. 2005) (Appendix 7).

### 3. Characteristics of the demand

Few and relatively limited national surveys have been made so far, but the number and depth of examinations of the popularity and wine tourism demand of the Pannon Wine Region are satisfactory. The latter is used here as an example to introduce the characteristics of demand.

#### 3.1. Popularity of the Hungarian wine producing areas

According the representative population surveys (MT Zrt. – M.Á.S.T. 2006), there are considerable differences as regards how well known the respective Hungarian wine producing areas are known. Whereas the proportion of those who know the names Tokaj, Eger, Badacsony or Villány ranges from almost 80% to approximately 50%, the least known wine producing areas – including a few high quality ones – are known by less than 5% of respondents (e.g. Lower Bükk, Ászár-Neszmély, Hajós-Baja).
The wine producing areas in the Pannon Wine Region are categorised by the Hungarian population into two separate groups of diverse characteristics. Stable members on the "House of Lords" include the Villány wine producing area – whose name is still frequently mentioned as Villány-Siklós wine producing area, i.e. the formerly used specification – and the Szekszárd wine producing area. The proportion of those in the survey sample who knew Villány was almost 50%, which made this wine producing area one of the best known ones in Hungary. Szekszárd was known by \( \frac{1}{4} \) of the sample, as revealed by the responses, which was a high value in the survey, still put this wine producing area to the last position of the upper class.

The extent to which the Pécs wine producing area – featured in its old name, Lower Mećsek area in the survey – and the Tolna wine producing area are known is totally different. Among the 22 wine producing areas, the Pécs one is at the bottom of the middle class with the 9% frequency of mentions, followed by the Tolna wine producing area that is known by 6% of respondents.

A somewhat more subtle approach to how much wine producing areas are known is allowed by the figures of consumer demand. Figure 2 indicates that even the products of wine producing areas familiar to 2/3 or almost that big a proportion of respondents have much more subordinate positions on the shelves of the supermarkets. On the shelves of hyper- and supermarkets, in addition to Villány and Tokaj it is Eger that shows the best position, with proportions from 15 to 20%. The majority of the Hungarian wine producing areas have shares far below 10% from the supply of Hungarian wines on the market. The position of Szekszárd in 8% of the stores is a good position. In this competition, the wine producing areas of Pécs and Tolna have considerable lags; their products can hardly be found in supermarkets.

![Figure 2. Products of the wine producing areas on the shelves of hyper- and supermarkets (Source: http://hvg.hu/gazdasag.hazai/20060214borpiac/page2.aspx )](image)

The Pécsi Borozó assigned the Szocio-Gráf Consumer Research and Survey Institute to carry out a national representative survey to detect how much the wine producing areas, the wineries and the grape sorts of the Pannon Wine Region are known and to demonstrate the segmentation of the market (Pécsi Borozó Vol. I. No. 3 pp. 58–59). The number of respondents mentioning the respective wine producing areas (Figure 3) follows the well-known pattern. Villány dominates the market, but the distance between it and Szekszárd is smaller than in the previous surveys. Although Pécs and Tolna lag behind the premier class, the proportion of respondents mentioning them – between 5% and 9% – reinforces the level of their popularity already revealed by previous national surveys.
The situation is somewhat different if we look at the extent to which wineries of the wine producing areas are known. This part of the survey underlines again the importance of Villány and of Szekszárd, although the latter lags far behind the former. The performance of the wine producing areas of Pécs and Tolna are even worse in this respect. Of all respondents, only 1.8% could name a wine producer or a winery from the Pécs area, while the same figure for the Tolna wine producing area was 0.7%. The dominant wineries shaping the image of the wine producing areas include the famous names of the “wine producer of the year” and the “winery of the year”. Another factor significantly promoting popularity is strong market presence, the large volume of bottled wines in shops. Good examples for this are the popularity of the Teleki Cellar and the Mőcsény wines of the Zwack Company.

Consumers of the wine region can be broken down into segments, as the survey suggests. The main groups are:

- predominantly men;
- diploma holders;
- with higher incomes;
- Budapest citizens in a high proportion.

The findings of the research also provide information for the definition of consumer characteristics across the different wine producing areas. The fans of Pécs wines are from the middle aged generation, between 50-59 years, in larger numbers. The wines of Szekszárd and Tolna have a more diverse range of consumers, as regard age. The age groups consuming these wines range from young adults in their thirties to the middle aged generation up to 59 years. A favourable feature of the Villány wine producing area is the large proportion of young adults and the middle aged generation in their forties among the consumers.

### 3.2. Popularity of the Pannon Wine Region

On the assignment of the Pannon Wine Region, tourism experts and students of the Faculty of Natural Sciences of the University of Pécs made a survey on the selected locations of the event called Open Whitsun Cellars on 30 May, Saturday and 31 May, Sunday 2009. The questionnaire survey included the Cabbage Festival of Bóly on Saturday, on both Saturday and Sunday the Szekszárd Whitsun Festival and only on Sunday the visitors to the Mecsekknádasd Rooster Stew Cooking Festival. According to the findings of the survey (Table 5), the wine route most known, after the Szekszárd and the Villány-Síklós Wine Route, was the Bóly-Mohács White Wine Route, followed by the Tolna Wine Route.
Table 5: Popularity of the wine routes in the Pannon Wine Region (Source: findings of the questionnaire survey)

In each wine producing area, approximately 85% of the respondents already used a wine route service. The level of satisfaction with the services is an important starting point of marketing and a measure of the quality of wine tourism services in the region. During the questionnaire survey guests evaluated both direct and indirect services of wine tourism, with which they were basically satisfied.

The most frequently used service directly related to wine tourism that guest used was wine tasting (72.73%), followed by visiting cellars (64.94%) (Table 6). Also, the highest level of satisfaction was attributed to wine tasting (4.77 on a 1 to 5 scale); the differences among the evaluations of the respective wine producing areas were negligible. As regards related service, the ones most frequently used by guests included catering (83.12%), which was the most popular of all services used.

<table>
<thead>
<tr>
<th>Service</th>
<th>Proportion of respondents using</th>
<th>Average level of satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event “Open Whitsun Cellars”</td>
<td>89.61 %</td>
<td>4.30</td>
</tr>
<tr>
<td>Other event</td>
<td>25.97 %</td>
<td>3.75</td>
</tr>
<tr>
<td>Wine tasting</td>
<td>72.73 %</td>
<td>4.77</td>
</tr>
<tr>
<td>Wine purchase</td>
<td>42.86 %</td>
<td>4.45</td>
</tr>
<tr>
<td>Visiting cellars</td>
<td>64.94 %</td>
<td>4.42</td>
</tr>
<tr>
<td>(Quality of) accommodation</td>
<td>20.78 %</td>
<td>4.00</td>
</tr>
<tr>
<td>Culinary pleasures / catering possibl</td>
<td>83.12 %</td>
<td>4.48</td>
</tr>
<tr>
<td>Folk traditions (e.g. local exhibition</td>
<td>31.17 %</td>
<td>4.13</td>
</tr>
<tr>
<td>Churches and monuments</td>
<td>51.95 %</td>
<td>4.33</td>
</tr>
<tr>
<td>Historical memorial places</td>
<td>37.66 %</td>
<td>4.55</td>
</tr>
<tr>
<td>Sport facilities (hiking, cycling)</td>
<td>22.08 %</td>
<td>3.59</td>
</tr>
</tbody>
</table>

Table 6: Level of satisfaction with the wine route services (Source: findings of the questionnaire survey)

Accommodation and sport facilities are used by a low proportion of guests, and they are also the services with which respondents were the least satisfied. This determines the position of the surveyed area in wine tourism, which is precisely indicated by the willingness to return (Figure 4).

On the basis of overall impressions, almost each of the visitors would recommend the destination to everybody, especially their own generation. In accordance with this, 50% of respondents will certainly visit to the region again, and another 20% find it likely that they will return. The number of those who will not want to return to the Pannon Wine Region in any case is negligible. In this case, reasons why respondents reject return to the area were as follows: family engagements, they require one-off visits, or they find prices too high.

Total
Yes, certainly  Probably  Perhaps  Probably not  No way  No reply


<table>
<thead>
<tr>
<th>Needs</th>
<th>Motivation</th>
</tr>
</thead>
<tbody>
<tr>
<td>physiological</td>
<td>solves and eliminates tension · alleviates the creation of new relations · offers recreation after stress-filled weekdays · to drink fine wine and have good foods (encounter of wine and gastronomy)</td>
</tr>
<tr>
<td>security</td>
<td>medical researches have proved the favourable effect of red wine on certain diseases · wine and a part of fresh foods contain antioxidants, trace elements and vitamins · need for healthy food</td>
</tr>
<tr>
<td>belonging</td>
<td>visiting cellars is a social programme with friends and relatives · strengthening of personal relations with business partners, acquaintances, wine producers · organisation of wine clubs and culinary clubs · membership in a wine order</td>
</tr>
<tr>
<td>esteem</td>
<td>status symbol · social recognition · organisation of wine dinners, garden parties · participation in enological or gastronomic events</td>
</tr>
<tr>
<td>self-actualisation</td>
<td>acquisition of own wine cellar or wine storage · labels on wine bottles with the owner’s name · own opinion on the issue, having a special own taste · participation in cooking, grilling or baking competitions</td>
</tr>
<tr>
<td>to know and understand</td>
<td>openness to integrate and learn new skills · interest in wine, from viticulture to wine production · exploration of other cuisines · getting to know production methods of foods · getting to know new products, producers, wine producing areas · participation in the process of wine making and cooking</td>
</tr>
<tr>
<td>aesthetic</td>
<td>the wine producing areas as an aesthetic experience · beauties of the well-kept cultural landscape · exploration of the values in the settlements of the wine producing area (local people, cellars, press houses, local gastronomy) · sequence of dishes, the way they are treated to guests, their colours, as an aesthetic experience of creations · respect for and acceptance of traditions</td>
</tr>
</tbody>
</table>

Source: Máté, A. 2007a

4. Operation of the market of the product, trends

4.1. Demand trends and target groups in wine tourism

The Community Wine Marketing Programme, and then the Strategy defined the selected target groups of wine purchase and wine tourism, on the basis of consumer trends. These were supplemented by the findings of our
market research in the Pannon Wine Region (Szabó, G. 2008; 2009). Taking market trends and the main target groups into consideration, the following groups can be identified:

§ **Young adults**

The segment involves the group aged 18-35. The youth is the most important target group of marketing communication, because they are the generation with the greatest purchasing power of all times, and they are very sensitive to advertisements and novelties. The consumption habits of the generation aged 18-25 are still developing, and this generation is easy to reach (organised education, media, internet etc.). At the same time, they are a considerable reserve for the increase of the consumption of wine, because their consumption is below the average, and they are also the majority among those who rarely or never consume wine. As regards the propaganda of wine culture, the 25-35 year generation is the most receptive, as more and more of them are interested in civilised wine consumption and the popularity of wine courses, tastings and other wine-related events (wine dinners, wine and gastronomic festivals etc.) is also growing among them.

§ **Women**

In the marketing of wines today, women have a growing importance, as they are responsible for shopping in most cases. They have a considerable purchasing power: although a little less than half of the revenues of households are earned by them, they are the ones who decide on the largest part of household expenditures. Although they do 75% of shopping, only 25% of them buy wine regularly. On the other hand, accessing this target group allows us to influence the wine consumption habits of families and increase their knowledge of wines. Just like the target group of youth, women also represent a significant potential, as many of them do not drink wine at all, and the proportion of women drinking less than one bottle per month on the average is almost 80%. However, they are more likely to drink wine than other alcoholic beverages, and they usually choose bottled quality wines.

§ **Wine friends**

This group contains those who like wine, for whom wine is a value and is more important than other alcoholic beverages. They usually live in Budapest or other cities, they have high school qualification and probably also have above average income. The consumption of wine is part of their ordinary days, entertainment and intimate moments as well. They are relatively well informed about Hungarian wine producing areas and wine sorts, and they are also open to specialities and wines from abroad. They live active social life, they like eating out, wine tastings and wine dinners, they participate in wine and gastronomic festivals, on weekends they make trips to the wine producing areas and also accomplish some kinds of wine courses. They are the most important target group; they are agile, dedicated and competent.

Further breaking down the potential target groups allows a more precise focus:

§ **Professional audience**: those wine producers, wine dealers and others dealing with wine qualification and gastronomy who use the special services of the professional centres established in the respective wine producing areas. They may be the target audience of wine qualifications, enological further trainings and gastronomy shows; they can be from the nearby city, from the wine producing areas of the wine region but may also come from the national or even international target group. This target group is interested in new services, appreciates new names and brands. They are willing to travel to have these new experiences.

§ **Participants of enological, wine tourism and wine gastronomy trainings**, the majority of whom are full-time and correspondent students studying at vocational trainings, BSc or MSc courses of higher education institutions, and also students of other courses. For them, wine regions and thus the centres of the wine routes can be locations of theoretical and practical trainings, which they can regularly use. They should also be considered as opinion makers who can activate new target groups, new circles of guests.

§ **Those interested in enological and wine gastronomy programmes, wine route information and services**, buyers of wines, who are the broad target group of customers. They may include guests visiting the wine regions and their towns and cities with different cultural, business or educational motivations. The guests of cities who are interested in wines, participants in conferences, tourists travelling in groups, the audience of events and guests just getting familiar with wine routes are the main target groups. They can be expected as regularly returning guests and the participants in group travels, especially if their programme is part of business tourism. At wine tourism service providers they show up as the audience of trainings, professional workshops and symposia. They are demanding consumers who use a wide range of services.
Special attention should be paid to the inhabitants living in the wine regions, who are the largest consumers of wines, drinking wine regularly, as national surveys show. The population, especially the urban part thereof, is dedicated to the wine producing areas of the wine regions, they happily make excursions to the wine producing areas and are the main participants in events organised on wine and gastronomy. They are an important target group; they are dedicated and conscious consumers and are also in a privileged situation, being in touch with the excellent producers and wine route service providers of their on wine producing areas.

Inhabitants of Budapest interested in wine, who consume wine regularly, are interested in wine culture and train themselves. They visit Hungarian wine producing areas with their friends or as family programmes. Their number is growing; they are very motivated and have substantial knowledge of wines. If they are satisfied guests, they can activate a significant number of acquaintances and wine friends to participate in the programmes fitting into the topics of the project location (e.g. Siller Festival), and to use the services of wine tourism. They are demanding and critical, but also relatively well-off – and they are consumers!

5. Environmental conditions of the operation of the market

5.1. The position of wine and gastronomy in development strategies

Wine and gastronomy in the National Tourism Development Strategy (NDTS 2005–2013)

The NTDS approved in 2005 defines selected and regional level priorities of touristic product development, new products built on innovation and the development of the selected destinations. Selected tourism products include health tourism, heritage tourism and congress tourism. Selected areas within heritage tourism are world heritage sites, national parks, equestrian tourism, gastronomy and selected events.

The objective of developing wine and gastronomy tourism is to

- use the values of Hungarian gastronomy and wine culture as touristic products;
- make restaurants meet the quality expectations of both domestic and foreign tourists;
- make as many Hungarian restaurants as possible offer real Hungarian foods and quality Hungarian wines;
- promote the breeding of indigenous Hungarian domestic animals and the cultivation of traditional plants, and increase their use in catering;
- improve the quality of services in as many Hungarian restaurants as possible (menus in foreign languages, polite waiters speaking foreign languages);
- decrease the number of abuses in the sector.

Wine and gastronomy in the operational programmes built on the New Hungary Development Plan (NHDP 2007–2013)

The development objectives of the 2007–2013 European budgetary period were defined in the NHDP, and the development of tourism was included in the regional operational programmes (ROPs). The development of wine and gastronomy was given different emphasis across the regions, depending on the local endowments.

- Under the measure called ‘Development of touristic products’ we can find the development of wine and gastronomy attractions and of theme routes.
- The measure called ‘Expansion of the supply of touristic services and the development of touristic infrastructure’ included the development of restaurants.

Wine and gastronomy in the New Hungary Rural Development Programme (NHRDP 2007–2013)

In the NHRDP elaborated for the 2007–2013 period, among the measures of the axis called “Quality of rural life and diversification of the rural economy” we find “Promotion of touristic activities”. The objective of the
measure is to develop the infrastructure conditions and the services of sustainable rural and agrotourism, from which the following can be connected to the topic of wine and gastronomy:

- presentation of agricultural activities and products
- creation of “heritage farms”: show farms, tasting of own products, development of handicraft workshops;
- development of wine tourism services: development of wine route member cellars for catering purposes in the settlements of the wine routes;
- organisation and support of local events.


The Community Wine Marketing Ltd. founded by wine production organisations worked out in 2008 the Community Wine Marketing Strategy of Hungary. In this document, national, regional and exporting strategies were defined. The strategy includes, in addition to the propaganda of wine culture, the promotion of consumption and image building, the propaganda of wine tourism and the promotion of the local HORECA sector. The objectives of the development of the latter two are as follows:

- working out publications and campaigns to advertise and promote wine tourism;
- modernise the websites of the wine routes;
- create a single information sign system and qualification system for the wine routes;
- organisation of events, festivals and tastings;
- assistance of the promotion of local events;
- organisation of courses, e.g. sommelier courses for the actors of local gastronomy.

5.2. Social, economic, technological and natural environment of the touristic product

The external environment of tourism has considerably changed in the last twenty years, which has an impact on the possibilities of the product called wine tourism and gastronomy (Dávid, L. – Jancsik, A. – Rátz, T. 2007).

Impact of the economic, legal and political environment:

- Frequent changes in the taxation system and the legal regulations make the operation of businesses more difficult.
- Although company business tax was decreased to 10%, catering activities are taxed with the highest rate of VAT, 25%[1]. The taxation of food vouchers led to the decline in their use.
- The changes in the exchange rate of Forint may have both positive and negative impact on turnover and revenues.
- The uncertainties of the tendering systems slow down developments.
- In the regional operational programmes, at the development of touristic infrastructure it is usually accommodations that are presented, catering is less important.
- The popularity of the travel cheques strengthens domestic tourism.

Impact of the technological environment:

- ICT developments promote computerised orders and invoicing and the management of the changes in the inventories.
· Internet allows credit card payments and e-mail orders; websites provide information on the supply and accessibility.

*Impact of the social environment:*

· The consumption habits and solvent demand of the population has an influence on the use of wine tourism and gastronomy services.

· The strengthening local non-governmental organisations of wine and gastronomy may promote the survival of the sector.

· There is a need for the further training of the actors in the sector, but it also requires the openness of the enterprises.

*Impact of the natural environment:*

· Special natural endowments are the foundation of the existence of wine producing areas, so their preservation is of utmost importance.

· The reasons for the decrease in the territory of the wine producing area include, in addition to the state-supported elimination of vineyards, urbanisation (spread of settlements) or the spatial expansion of holiday resorts.

· Global climate change may influence the possibilities of planting and cultivation of vines, the time of the vintage and the character of the wines.

[1] Which will be raised to 27% in January 2012 (*by the translator*).

### 6. Cooperation with other products, synergy effect

*Connection of wine tourism and gastronomy*

In wine tourism the tight relationship of wine and gastronomy is very important, both in cellars receiving guests and in restaurants. Regional ties can be further strengthened by local wines and region specific (fish, game) or ethnic (Hungarian, Székely, German, Serb, Croat) dishes. The majority of the wine producing areas abound in other local agricultural products (cheese, red pepper, asparagus, ham, salami, brandy) that are worth trying with wines but have received little attention so far (*Máté, A. 2007a*). Viticulture and wine making give work for producers all year long. The work processes can be accompanied by holidays and religious traditions, several of which wine producing areas have preserved or revived. Some of these include celebrations, balls, catering and feasts. The most typical example is the day of St. Martin, which has become almost identical by now with the new wine and the consumption of roast goose. This programme has gained a growing popularity with tourists in the recent years. The creation of gastronomic theme routes is in its infancy, so the experiences of the operation of wine routes can be of great use in the future in the establishment of theme routes built on agricultural products.

*Connection with village tourism*

The special form of relationship between the values and traditions of agricultural production and its products and village tourism is the creation of very pleasant holidaymaking conditions in the wine producing areas, at wine producers. Holiday at a wine maker is a well-functioning rural tourism supply, in addition to Austria and Germany, in a number of European wine producing countries. The programmes called “Urlaub am Weinbauerhof” (Holiday at a wine farm, in Austria) and “Urlaub auf dem Winzerhof” (Holiday at a wine dresser, in Germany) are not only well-known and popular but also qualified.

The factors of their attraction include the fact that operating agricultural small holdings receive guests who get to know the production methods of traditional local goods, with the care and discipline that accompany viticulture and wine making. Guests, with the competent guidance of the host, can gain direct experiences about the values of wine tasting and wine culture typical of the respective area. Wine is impossible without gastronomy in any place, so typical local foods matching wines are also part of the offer. Wine farmers are members in a wine producing area, typically a wine route, so they inform their guests about other sights of interests and programmes, and also the events of the wine producing area and the wine route.
Andrea Máté - Géza Szabó: Wine and gastronomy tourism

This is similar in Hungary too. Hungary has 22 wine producing areas now, in which more than 30 wine route associations are organising the touristic supply of their own regions. In this offer of programmes, an important part is those wine producers who also provide accommodation. Supplies categorised as village tourism in the wine route of South Transdanubia cover 15-25% of the total range of services, so their significance for wine routes are outstanding.

The specialised products of village tourism include wine tourism also in Hungary. The table below (Table 8) demonstrates that in the relations system of agriculture and village tourism, supplies of utmost importance are, in addition to health inns and village gastronomy, programmes like “Holiday at a wine maker”.

<table>
<thead>
<tr>
<th>Attractions</th>
<th>Special village tourism products</th>
<th>Connected rural tourism products</th>
</tr>
</thead>
<tbody>
<tr>
<td>Values and products of agriculture</td>
<td>- Health inn (herbs, bio-products, reform lifestyle, healthy local foods)</td>
<td>- Health tourism</td>
</tr>
<tr>
<td></td>
<td>“Village gastronomy” (gastronomic experiences, local products)</td>
<td>- Agrotourism</td>
</tr>
<tr>
<td></td>
<td>Holiday at a wine maker (village tourism in the supply of wine route)</td>
<td>Agrotourism, wine tourism and theme routes built on local products</td>
</tr>
</tbody>
</table>

Table 8. System of rural attractions, special village tourism products and related products of rural tourism

(Edited by the agrotourism-focused further development of Szabó, G. 2006: A vidéki turizmus Magyarországon, Rural tourism in Hungary)

7. The practice of product development

7.1. The Pécs-Mecsek wine route of the Pannon Wine Region

The most important of the theme routes fitting into rural tourism is the network of wine routes exploring and demonstrating wine producing areas of the regions. Since 1994, when the first wine route of Hungary, the Villány-Siklós Wine Route started to operate, four new wine routes has started to work in the Pannon wine region that integrates the wine producing areas of Villány, Pécs, Tolna and Szekszárd in South Transdanubia. Besides the first and largest wine route, the Villány-Siklós Wine Route it is the Bóly-Mohács White Wine Route, the Tolna Wine Route and the Szekszárd Wine Route, and the last wine route founded, the Pécs-Mecsek wine route created in 2005 that make the considerably extended supply. A good example demonstrating the volume of the supply and the breakdown of wine route services by branches is the supply of the 45 qualified service providers of the Pécs-Mecsek Wine Route (Figure 5). Wine routes, as shown by Figure 6 also by the example of the Pécs-Mecsek Wine Route, are based on real regional cooperation, because 45 qualified service providers are available in 11 settlements.
Programmes, events 13%
Wine tasting and wine sales 33%
Winehouse 7%
Catering 20%
Accommodation 18%
Village tourism 9%

Figure 5. Breakdown of the qualified services of the Pécs-Mecsek Wine Route in 2010
Source: data provided by the wine route

Figure 6. Breakdown of the qualified services of the Pécs-Mecsek Wine Route by settlements, 2010
Source: data provided by the wine route

Focal points in the supply of the Pécs-Mecsek Wine Route are as follows:
- The historical and cultural heritage of Pécs; ECC 2010
- Enological and gastronomy supply
• Natural heritage and active recreation:
  • ecotourism
  • equestrian tourism
  • cycling tourism
  • Traditional values of the landscape and the settlements:
  • cultural tourism, festivals, events
  • village tourism

7.2. Szekszárd Vintage Days 2009

The Szekszárd Vintage Days are the most important and largest festival of the city of Szekszárd. The uniqueness of the festival is provided by the local traditions and the excellent Szekszárd wines. The local society requires the revival and preservation of the traditions, in which the traditionalist groups have an important part. A merit of the Szekszárd Vintage Days is to keep these traditions alive, for four decades now. The festival celebrated its 40th anniversary in 2009, as it has been organised each year since 1970. The official organiser of the event of the Municipality of Szekszárd has been the Mihály Babits Community Centre and the House of Arts since 2005. A co-organiser of the programme is the Szekszárd Wine Region Non-for-profit Ltd., responsible for enological programmes and keeping in touch with the wine producers. In 2009, the 28 organisers were assisted by 56 volunteers. In 2005 significant changes took place in the life of the event. The city did not continue the contract with the former organiser who, however, had patented the name Szekszárd Vintage Festival and the connected logo of János Háry [1]. The city then returned to the original name of the event, Szekszárd Vintage Days. The timing of the four-day event was moved to the 3rd weekend of September in each year (from the 4th weekend), in order to avoid overlaps with the wine programmes of Pécs and not to take away guests from there. Also, changes occurred in the programmes and the locations. The more demanding handicrafts exhibitions are now separated from the locations of the more joyful, funfair-like programmes (Appendix 8). The historical city centre, the place around the inner city church is now home the pavilions of the wine producers and the restaurants, the handicrafts and arts fair and the large stage. Guests arriving were expected by 75 programmes and events at 22 locations (www.szekszardiszuretinapok.hu). The programmes of the festival are very diverse, although the central theme is vintage and wine, still the arts character dominates. The pavilions in the Court of Wines and the Street of Tastes show a single image, and they are big enough to comfortably set guests who do not get wet even if the weather is rainy (Appendix 8). Places are drawn every year, this way conflicts among participants (about who gets where) can be avoided. Civilised wine consumption is reinforced by the fact that wine producers only bring bottled wines and guests can taste wines from elegant glasses. The Wine Seminar is a new programme, it has been organised for 5 years, only, and it is about one local wine producer introducing his/her wines to the narrower audience. The goal of this programme is to teach guests about the steps of wine tasting, civilised wine consumption and local producers. In the Street of Tastes local restaurants organised into an association show up, as a single body called Round Table Association of Szekszárd Restaurants, offering their freshly made foods and thereby strengthening local enterprises. The traditional Vintage Procession is a huge event, with almost 2000 participants in 2009. In the procession many actors participate, including local and invited wine orders, the city management, folk dance groups, horse carriage drivers, and the youth from the local kindergartens and schools, dressed in fancy clothes.

The cultural events offer entertainment to all generations, from children to adults, so they can be joint experiences for families with children or for friends’ companies. Several programmes allow active participation of guests, like the Dance House or the handicrafts programmes for children. The biggest masses were attracted by two popular music concerts (by the EDDA rock group and the singer Rúzsa Magdi) (www.szekszardiszuretinapok.hu). Many local stakeholders made performances: folk dancers, choirs and orchestras, theatre groups and sport associations. The handicrafts and art fair is a high quality auxiliary of the cultural programmes.

The event is enriched by other auxiliary programmes as well. The funfair, the street ball and disco are attractive for the youth in the first place, while the car shows guarantee that supporters also show up. An annually recurring scientific conference is held on the world of fairs, another one was organised to commemorate the 150th anniversary of the birth of the Szekszárd-born natural scientist László Hollós, a researcher of truffles.
By 2009 the new logo of the festival was made (Appendix 8), together with the separate own websites at www.szekszardiszuretinapok.hu and www.szüretinapok.hu, although the latter uses accentuated letters and does not show the location. In addition, websites of the Mihály Babits Community Centre and the House of Arts (www.habitsmuv haz.hu) and the municipality of Szekszárd (www.szekszard.hu) contained information on the festival. Information on the event, in addition to the Internet, was also available from printed information booklets and the Tourinform Office of Szekszárd. According to the data of the Tourinform Office, in addition to the summer months a considerable interest in the city could be registered in September, due in a large part to the Vintage Days (Appendix 8). During the time of the event, information points were also located where guests could purchase glasses to drink wine, among other things.

Media supporters of the event included the local and county press and radio. In 2009 the reduced budget did not allow the appearance in the national media. The economic crisis reduced the financial limits allocated for the event. Only a small part of the budget of the event was provided by the local government of the county seat. The rest had to be collected from the ever narrower tenderable resources (AMC – Hungarian Agromarketing Centre support, rejected NKA – National Cultural Fund – tender, while the RIB – Regional Tourism Committee – tender was not even announced, due to the lack of the financial frameworks), renting the venues, entrance tickets and the sales from the wine glasses, and a large part also from sponsors (information by Gabriella Szanyó-Lóki). Three-quarters of supporters are businesses located in Szekszárd or Tolna County, the rest are usually multinational corporations manufacturing refreshments, mineral water, or coffee, tobacco and alcohol.

The questionnaire survey conducted with the assistance of the tourism management specialisation students of the Illéris Gyula College Faculty of the University of Pécs, Szekszárd, allowed us to get to know the opinions of guests. The processing of the questionnaires brought an important finding: respondents expected further developments especially in the tasks of wine tourism necessitating community cooperation (of municipalities, wine producers, non-governmental organisations and cultural establishments) and less in the advertising of wines, the improvement of the recognition of the wine producing area and the image of the constituent settlements, or the improvement of the quality of enological programmes. In the second place they mentioned developments individually manageable by the cellars, so they were more satisfied with the latter.

The assessment of the festival allows us to define the following development objectives:

- Keeping and increase of the number of guests at the festival
- Preservation of the quality level of the event, development of the auxiliary services
- Strengthening marketing and information supply
- Development of local wine tourism
- Continuation of the questionnaire survey among guests

To sum it up: it is a huge achievement that the event was able to renew itself since 2005, both in content and appearance – programmes, locations, wine pavilions, name and logo – which was a prerequisite for today’s success. The success of the festival is proved by many facts: the large number of visitors, on the one hand, even though we are going through an economic crisis. According to the estimations of the organisers, the festival had 35,000 visitors in 2009, which is a 2% increase compared to the previous year (www.szekszardiszuretinapok.hu). On the other hand, both the city management and the wine producers expressed their satisfaction. The Municipality of Szekszárd regularly invites the delegations of its twin cities to this programme, and they really enjoyed the festival. Some of the wine producers realised a larger income at this Szekszárd festival than in the early September Buda Castle Wine Festival (Budapest International Wine and Champagne Festival). Their experience was that guests did not only taste wines at more acknowledged wine producers but were also interested in the newcomers of the second or third wave and tried to explore as many wineries as possible. Third, the questioning of the guests also showed that visitors were satisfied. Not last, a proof of success is the fact that the staff of the Hungarian Festival Association assessed and qualified the event in the framework of the Hungarian Festival Registration and Qualification Programme (www.fesztivalregisztracio.hu), as a result of which the event was awarded the title “event with excellent qualification” on 2 December 2009.

[1] János Háry is a character of tales, the Hungarian version of Baron Munchausen
8. Research characteristics of the product, difficulties and recommended databases

For the survey of enological tourism we have a limited amount of Hungarian and international literature. Publications on wine tourism look at the system of wine tourism and wine routes, the type of wine routes and their services, the methodology of their creation and the experience of the operation in connection with a concrete wine producing area, wine region or statistical region (Máté, A. 2009, 2007a, b, 2006, Michalkó, G. – Vizi, I. 2006, Sarkadi, É. – Szabó, G. – Urbán, A. 2000, Szabó, G. 2006, 2003a, b, 2002, 2001, 1995). The growing interest in wine culture and the lack of relevant skills led to the publication of books on wine tasting and the relationship between wine and gastronomy (Csoma, Zs. 2002, Niszkács, M. – Mészáros, A. 2002, Takács, Zs. [eds.] 1999, 2001, Rohály, G. – Mészáros, G. – Nagymarosy, A. 2004). These publications may also have a dominant role in awaking interest in wine tourism. In addition to the Hungarian wine tourism publications, what is available on the issue is the practical experiences of the wineries and the wine routes, and a few unpublished wine route manuscripts. The articles by Cambourne, B., Macionis, N., Frochot, I., Hall, C. M. and Preston-Whyte, R. give information on the practice of European and overseas wine tourism, through case studies (Cambourne, B. [et al.] 2002a, 2002b, Cambourne, B. – Macionis, N. 2002, Frochot, I. 2002, Hall, C. M. [et al.] 2002a, 2002b), which prove that the wine producers of the New World have growing success not only in wine production but also in the field of wine tourism.

The literature on gastronomy has a dual character. Gastronomy as the skill of food and beverages and as a catering skill has a substantial literature (Arabadzisz, I.-né – Oriskó, F. – Tomis, A. 2005, Bádonyi, M. 2009, Burkánc Szolnoki, Á. 1999, Tusor, A.-Sahin-Tóth, Gy. 2006). On the other hand, literature background is deficient on the relationship of gastronomy, catering and tourism and on gastronomic theme routes (Fehér, I. – Kőrösi, M. 2008); they may appear sporadically as sub-chapters in the previously mentioned books. On the eating habits of the population, studies made on the assignment of the Hungarian Tourism Inc. provide information (MT Rt. – M.Á.S.T. 2006, MT Zrt 2009).

There is only partial information on the actors of wine tourism. Statistical surveys (by HCSO), questionnaire surveys and occasional interviews give information on the producer side. However, there are even less surveys on wine tourists, present researchers mostly concern the wine consumption and wine purchase habits, mainly, as parts of wine marketing surveys (Alpár, L. – Farkas, Z. – Geömceől, A. – Nemes, R. – Sztakovics, K. 2008, Charters, S. – Ali-Knight, J. 2002, MT Rt. – M.Á.S.T. 2006, Oszoli, A. – Szabó, A. – Molnár, E. – Botos, E. P. 2003). Wine producers themselves do not collect data on their guests, either. The target groups of wine tourism can thus be assessed from empirical observations, and on the basis of case studies (Máté 2007a, 2009).

The frequent legal changes often resulted in the changes of the names of the wine producing areas, but several pieces of literature, touristic and enological websites and even the 2009 vineyard survey of the HCSO fails to follow these changes.

There is a need for a single wine route database where the (official and confidential) data and services of the wine route service providers are annually updated, making them suitable for statistical processing. It would be important to receive annual data on the turnover of guests from the wine route members (cellars, catering facilities, accommodations etc.), as this would make wine tourism developments more plannable. The creation of this system would also be useful for the gastronomic theme routes.

9. Apendices

Appendix 3. Territories of the wine producing areas in Hungary

The size of vineyards per territorial unit, 2001, 2009 (in hectares) (ed. Máté, A.)
Change in the extension of vineyards since 2001 (in per cent) (ed. Máté, A.)

Source: www.ksh.hu
Change in the volume of wine production in Hungary (in million litres) (ed. Máté, A.)

Source: www.ksh.hu

Territory of the vineyards by grape sorts and by territorial unit, 2009 (in per cent) (ed. Máté, A.)

Source: www.ksh.hu

Szekszárd wine producing area

Szekszárd – Istifángödre  
Szekszárd – Kadarka Street

Szekszárd – Bogár Farm  
Szekszárd – Béri Balogh Ádám Street

Szekszárd – Benedek Valley  
Zomba – Szent Gaál Chateau

Tolna wine producing area
Appendix 5. Signs of the European Wine Routes

Guest Reception & Visiting
Appendix 6. Information signs of the wine routes by the example of the Pannon wine region

Source: http://www.arev.org/article/articleprint/de_DE/104/-1/21/ [2002.04.06.]
Szekszárd wine route

(1) Signpost marking wine route service providers, Szekszárd

Touristic signpost of the Municipality of Szekszárd

(2) Signpost introducing a wine route settlement

on the outskirts of Szekszárd (at the Hotel Sió)

Signpost marking a wine route, Szekszárd

Tolna wine route
Signpost marking wine route service provider
Villány-Siklós wine route

Signpost introducing a wine route settlement, Villány
Siklós

Mohács-Bóly White Wine Route

Signpost introducing a wine route settlement, Dunaszekcső
Signpost marking a wine route, Bóly

Appendix 7. Catering establishments of Hungary

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurants</td>
<td>39.3%</td>
</tr>
<tr>
<td>Confectioneries</td>
<td>20.6%</td>
</tr>
<tr>
<td>Other non-hot kitchen catering units</td>
<td>24.7%</td>
</tr>
<tr>
<td>Bars, wine bars, pubs, music pubs, discoteques</td>
<td>12.4%</td>
</tr>
<tr>
<td>Canteens</td>
<td>3.0%</td>
</tr>
</tbody>
</table>
Breakdown of the number of catering units by regions, 2008 (ed. Máté, A.) (Source: www.ksh.hu)
Change in the number of catering facilities by type since 2001 (ed. Máté, A.) (Source: www.ksh.hu)

Commercial catering units

Canteens

Revenues of catering facilities since 2001 (ed. Máté, A.) (Source: www.ksh.hu)
Food  Alcoholic beverages  Non-alcoholic beverages  Coffee  Tobacco

Breakdown of the turnover of catering units by main types of goods since 2003 (ed. Máté, A.)
(Source: www.ksh.hu)

Appendix 8. Szekszárd Vintage Days 2009

Locations of the Szekszárd Vintage Days 2009 (www.szekszardiszuretinapok.hu)

Programmes and statistics of the Szekszárd Vintage Days 2009

<table>
<thead>
<tr>
<th>Types</th>
<th>Programmes</th>
<th>Statistics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wine and gastronomy</td>
<td>Vintage procession</td>
<td>1926 participants, 47 programmes</td>
</tr>
<tr>
<td></td>
<td>Wine court</td>
<td>17 pavilions, 34 Szekszárd and 1 Tolna wine producer, 2 brandy houses</td>
</tr>
<tr>
<td></td>
<td>Wine seminar</td>
<td>10 occasions - 10 wine producers</td>
</tr>
<tr>
<td></td>
<td>Wine order inauguration ceremony</td>
<td>Entrance tickets - 224 participants</td>
</tr>
<tr>
<td></td>
<td>Street of tastes</td>
<td>5 pavilions - 5 restaurants, 1 cocktail bar</td>
</tr>
<tr>
<td>Cultural events</td>
<td>Children’s programmes</td>
<td>5 performing groups</td>
</tr>
<tr>
<td><strong>Playground / Handicrafts School of Small Apprentices</strong></td>
<td>8 masters, 8 kinds of handicrafts programmes for children</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td><strong>Folklore programmes, folk music programmes</strong></td>
<td>21 folk dance groups – 886 dancers</td>
<td></td>
</tr>
<tr>
<td><strong>Choir/orchestra concerts, performances</strong></td>
<td>6 orchestras and choirs performing</td>
<td></td>
</tr>
<tr>
<td><strong>Pop music concerts</strong></td>
<td>11 performing groups, 2 large-scale concerts</td>
<td></td>
</tr>
<tr>
<td><strong>Dance shows and theatre performances</strong></td>
<td>21 folk dance groups – 886 dancers</td>
<td></td>
</tr>
<tr>
<td><strong>Exhibitions</strong></td>
<td>6 fine arts, 1 folk arts, 2 graphic exhibitions</td>
<td></td>
</tr>
<tr>
<td><strong>Literature programme</strong></td>
<td>3 programmes</td>
<td></td>
</tr>
<tr>
<td><strong>Handicrafts and arts fair</strong></td>
<td>121 handicraftsmen and art goods merchants 7 artists, jugglers</td>
<td></td>
</tr>
</tbody>
</table>

### Other programmes

<table>
<thead>
<tr>
<th><strong>Sport and dance shows and programmes</strong></th>
<th>8 dance groups with 130 participants</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Car show</strong></td>
<td>5 car dealers: 26 cars, 1 ship</td>
</tr>
<tr>
<td><strong>Conferences</strong></td>
<td>2 conferences</td>
</tr>
<tr>
<td><strong>Funfair</strong></td>
<td>15 toys of entertainment</td>
</tr>
<tr>
<td><strong>Street ball, Disco</strong></td>
<td>1+1</td>
</tr>
<tr>
<td><strong>Environment protection and health education programmes</strong></td>
<td>1 environmental 2 health education programmes</td>
</tr>
<tr>
<td><strong>Vintage Beauty Contest</strong></td>
<td>19 participants (incl. 2 foreigners)</td>
</tr>
</tbody>
</table>

Source: ed. Máté, A. by www.szekszardiszuretinapok.hu

Logo of the Szekszárd Vintage Days (www.szekszardiszuretinapok.hu)
Inquiries at the Szekszárd Tourinform Office in 2009 (persons) (ed. by the author by the data of the Tourinform Office)

Handicrafts and arts fair (photo: Máté, A.)
Wine court (photo: Máté, A.)

Street of tastes (photo: Máté, A.)
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17. http://www.vintour.hu/pages/sub.jsp?id=130
1. I. Theme parks

Tourism history preliminaries of this product

The first theme parks in the modern sense of the word were opened in the USA, but actually the first institutions with entertainment functions were established in Europe. The supply of today’s parks can be traced back to two social-historical preliminaries, i.e. public feasts and the entertainment of the nobility in the 18th century. The predecessors were the entertainment – fun – parks. The fist park of this type was established in 1550, and it was called a garden of entertainment. The oldest theme park of the world can be found in Bakken in Klambenborg (1) near Copenhagen; it was opened in 1583 and has been operating since then. 19th century was the first heyday of entertainment parks. In 1843 in Copenhagen the Tivoli park (2) was opened (2), and in a few years it became the most visited entertainment facility in the world. In the late 19th century, the first seaside entertainment centre of the world was built in Blackpool (3), and it is still one of the most popular attractions in Great Britain. The parks built in the late 19th century were more dynamic, more active, responding to the change of the consumer preferences.

Parks built at the turn of the 19th and 20th century had, in the name of entertainment, different toys and strength-testing tools, and they could be visited at fairs, carnivals; they operated as travelling circuses. The most famous and largest entertainment centre of the first half of the 20th century was established in Coney Island, it consisted of three parks and several smaller scale attractions. The most renowned of these is the “Steeplechase Park” (1) which opened in 1897, already. Since 1927 the most famous attractions of the fun parks, the “Cyclone” roller coaster has been operating here.

The real heyday of the theme park is dated to the second half of 20th century; they are both a driving force and also a beneficiary of the appearance of mass tourism and globalisation. Parallel to this, smaller scale facilities organised on local values have appeared since the 1980s, which is most typical of the European continent. In the 1980s and 1990s there was an extremely dynamic growth in the number of theme parks, and they have spread since then practically all over the world. In 1994, in the United States alone 200 million entrance tickets were sold. In addition to increasing their number and size, theme parks had a strengthening role in the recreational and leisure activities of society. Significant amounts of money were spent on the improvement of the quality of services, besides the maintenance of the safety of toys and also on the increase of experience and extremity.

When looking at the history and the present situation of theme parks, we cannot neglect the Disney Empire. Although the first theme park organised on the topic of a children’s tale – the Efteling – was opened in Europe in 1951, followed by the inauguration of the Bellewaarde Park in 1954, such theme parks were made famous all around the world by Walt Disney. Walter Elias Disney founded in 1955 in the vicinity of Los Angeles the first Disneyland fun park complex (4), followed nine years later by the second park of his empire in Florida. Disney was the first to recognise that in the strengthening post-war American middle class a mass demand for entertainment and travel showed up. Special attention was paid to the creation of the comfort of the visitors, and to safeguarding the required quality. The Disney television channel supported the dissemination of this principle to the consumers. However, negative socio-economic impacts can also be attributed to the Disneylands, still the innovation, the applied solutions and the professionalism of the company has allowed it to operate at a quality level for a long time that the competition has not even been able to follow. In the 1960s and 1970s, several similar entertainment centres were built, inspired by the success of the Disney parks, and several famous fun parks repositioned themselves on the market.

2. Elements of supply

Theme parks are part of the supply system of tourism, they have attraction functions. The toys and programmes offered by the park are the actual attractions, whose range of impacts depends on the uniqueness, the complexity and the accessibility of the park, its services and toys. The increase of complexity is likely to lead to the increase
Theme attractions, although they all are man-made facilities that have been born as a result of tourism product development, rely upon cultural and natural endowments to varying degrees. While the latter serve as the basis for the establishment of theme parks and production-related multifunctional – visitors and experience – centres, the entertainment centres can operate totally independent of the geographical features of the given space. Theme attractions can also be classified according to the use of the rides. It is observable that in cases when the product does not really integrate the cultural and natural endowments, these may be substituted by the use of rides. Adventure parks are a transitory phase also in this respect, because rides are present, but only with a few elements.

The product is a mixture of tangible and intangible components. In the case of theme parks, product elements consist of the following main units, taking Middleton’s classification into consideration:

- Rides of the theme park, toys and exhibitions,
- Support services,
- Accessibility of the theme park,
- Image of the theme park,
- Charges for the use of the services of the theme park.

Table 1 below features the product elements that can be connected to the respective constituents.

<table>
<thead>
<tr>
<th>Type</th>
<th>Subtype</th>
<th>Product elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Attractions</td>
<td>Mechanical</td>
<td>Zorb, Bob, Climbing wall</td>
</tr>
<tr>
<td></td>
<td>Motorised</td>
<td>Quad</td>
</tr>
<tr>
<td></td>
<td>Built on sight of interest</td>
<td>Park, Garden, Zoo, Plant house</td>
</tr>
<tr>
<td></td>
<td>Exhibition locations</td>
<td>Open-air stage, 3D cinema</td>
</tr>
<tr>
<td></td>
<td>Sport facilities</td>
<td>Horse riding, golf, paddling</td>
</tr>
<tr>
<td>2. Catering</td>
<td></td>
<td>Restaurant, buffet, coffee shop, drink vending machine</td>
</tr>
<tr>
<td>3. Commerce</td>
<td></td>
<td>Souvenir shop</td>
</tr>
<tr>
<td>4. Accommodations</td>
<td>Hotel, camping site, youth hostel</td>
<td></td>
</tr>
<tr>
<td>5. Service infrastructure</td>
<td>Parking place, telephone, visitor centre</td>
<td></td>
</tr>
<tr>
<td>6. Support activities</td>
<td>Administration office, park maintenance</td>
<td></td>
</tr>
</tbody>
</table>


3. Characteristics of the demand

Coming from the versatility of theme parks, considerable differences can be explored in the characteristics of the demand side. Theme parks are addressed to segments with different motivations, interests, of various demographic and sociological features. The characteristics of the demand also depend on which phase of the life cycle the product is in, and what kinds of tourists (defined by Cohen’s and Plog’s typology) can be expected. While heritage parks are designed for the domestic visitors, aquaparks having gained international recognition and based on mass tourism also receive large numbers of foreign guests. It is also true for the leading European parks built around culture-related issues that most of their visitors are domestic tourists, i.e. 80% of the guests in the French Parc Asterix are French citizens.

Theme parks have complex attraction and motivation structures. In each case the central function is entertainment, but several auxiliary functions must also be highlighted, as they give the unique character, the specific features of the parks. The classic function of parks is recreation, leisure, which is accompanied in some
parks by education and teaching. The latter function is founded by experience pedagogy. In addition to education and teaching it is adventure therapy that gives an even greater chance of specialisation to the parks. Approaching theme parks from the demand side, the expansion of the parks is oriented towards the higher levels of Maslow’s hierarchy of needs, although on the basis of the number of visitors it still establishes concentrating on mass tourism and the satisfaction of the most basic needs that prevail. Among the latest types of theme parks, we have to mention heritage and adventure parks, which, in addition to entertainment, target the higher level of hierarchy of needs. On the demand side, one of the reactions to the transitions of the post-Fordist tourism – including the increase of demand-orientation – is the change of the direction of developments.

4. Operation of the market of the product, trends

These days the model of the modern entertainment parks is going through significant changes. Increased differentiation and the adaptation to the local endowments have resulted in the birth of two large categories: theme parks (with further functions in addition to entertainment) and entertainment – fun – parks. However, the separation of theme parks from entertainment parks is not always clear-cut. The topic of the former is often too general, built on a geographical or historical event, phenomenon.

The popularity of theme parks is indicated by the fact that their number exceeds 750 in the USA, and the number of their visitors is over 300 million per year. The increase in the number of the theme parks, however, has led to the saturation of their original market. The high investments and operational costs do not allow the coverage of small market niches. Actors must adapt to the intensification of the competition. There is competition not only among the individual parks; services targeting similar motivations are also to be considered as competitors of the parks. A “golden rule” for the success of theme parks is the ability of continuous renewal; they should be able to offer a new attraction to the visitors every year, which, in addition to attracting first time visitors, also increases the willingness to return. European theme parks spend each year 20% of their revenues on the average on the improvement of the quality and range of their services. Approximately 60% of this amount is covered from the sales of entrance tickets; the remaining 40% is from catering and commercial activities.

The future lies in popular topics that allow the application of modern technical solutions. An example to be mentioned is Planete Futuroscope (5) near Poitiers in France, featuring the latest audiovisual technology. The basis principle of the attractions is that the boundary between reality and fiction is blurred by the technical solutions. One of the most famous units in the park is Cinéma Dynamic where spectators are seated in moving chairs which are moved in accordance with the action in the films, making spectators almost participants in the story. This park has attracted more than 31 million visitors from all over the world since its opening in 1987 – but 95% of them were domestic citizens.

Table 2: Most visited theme parks in the world

<table>
<thead>
<tr>
<th>Name of the park and business group that it belongs to</th>
<th>Location</th>
<th>Number of visitors (in 2007)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Magic Kingdom, Walt Disney World</td>
<td>USA, Florida, Lake Buena Vista</td>
<td>17,063,000</td>
</tr>
<tr>
<td>Disneyland</td>
<td>USA, California, Anaheim</td>
<td>14,721,000</td>
</tr>
<tr>
<td>Tokyo Disneyland</td>
<td>Japan, Tokyo</td>
<td>14,293,000</td>
</tr>
<tr>
<td>Disneyland Paris</td>
<td>France, Marne-La-Valle</td>
<td>12,688,000</td>
</tr>
<tr>
<td>Tokyo Disneysea</td>
<td>Japan, Tokyo</td>
<td>12,498,000</td>
</tr>
<tr>
<td>Epcot, Walt Disney World</td>
<td>USA, Florida, Lake Buena Vista</td>
<td>10,935,000</td>
</tr>
<tr>
<td>Disney’s Hollywood Studios</td>
<td>USA, Florida, Lake Buena Vista</td>
<td>9,608,000</td>
</tr>
<tr>
<td>Disney’s Animal Kingdom</td>
<td>USA, Florida, Lake Buena Vista</td>
<td>9,540,000</td>
</tr>
<tr>
<td>Universal Studios Japan</td>
<td>Japan, Osaka</td>
<td>8,300,000</td>
</tr>
<tr>
<td>Everland</td>
<td>South Korea, Kyonggi-Do</td>
<td>6,600,000</td>
</tr>
</tbody>
</table>

The theme park offer in the world is dynamically developing year after year. The newly built theme parks do not follow the American base model; they are functioning by new organisational and operational principles. TEA reports suggest the trends and tendencies listed below should be expected on the market of the theme parks:

· choice of topic on the basis of the endowments of the country/region,
· a growth in the proportion of locations and facilities of mixed use;
· an increasing participation and activity of the visitors;
· simulation and virtual reality,
· water-related establishments,
· theme parks independent of the weather conditions.

5. Environmental conditions of the operation of the market

Theme parks are among the most capital intensive tourism products. They are fashionable and popular attractions where the life cycle and the amortisation of the product elements are extremely accelerated. The return on investment requires a very high number of visitors, the source of which, in addition to tourists, is local inhabitants. The biggest parks offering entertainment in the classical sense of the word can be found in developed countries with a large number of population (e.g. USA, Japan, Germany). At the establishment of the parks another issue to be considered is the pleasant climate, which is also a dominant factor in determining opening time. A basic criterion for the operation of parks is security, whose continuous monitoring is one of the most important tasks of the management of parks. During the development of new toy elements the major tasks of the manufacturers is to minimise the risk of accidents.

6. Cooperation with other products, synergy effect

Theme parks have indirect relations to other tourism products, which is best seen in the case of heritage, aqua and adventure parks. Heritage parks can be related to cultural tourism inasmuch as they process a historic period or the cultural heritage of a region/country. Aquaparks can relate to wellness tourism, while adventure parks can have relations to different sorts of active tourism. A common connection point of all parks is to youth tourism which is also one of the main target groups.

7. The practice of product development

The focus of the product development in the theme parks is the selected theme. All toy elements and the related and support services must serve and implement the authentic processing of the theme. The product development characteristics of the parks come from the structure of the product. The rides and toy elements of the theme parks influence the range of tourists visiting the park, and thereby also the composition of potential and actual tourists. Support services make the experience, the feeling of the experience full; they support and strengthen experience. Accessibility involves transport access to the park by the consumers. In this respect both public and private transport possibilities must be taken into consideration, where, in addition to the means of transport used, other important aspects are speed, comfort, reliability and price. The image of the theme parks must not necessarily be based solely on the consumers experience; it can also be influenced by the motivation of visiting parks. Package offers have also appeared on the market, which requires cooperation with external actors. Such “packages” include, in addition to the visit to the park itself, further services such as accommodation. A classic method for pricing in theme parks is the so-called pay-one-fee, which means that the entrance ticket allows the visitor to use all toys in the park. In Hungary this general principle is applied differently, usually an alternative pricing policy is applied by the parks.

8. Product-related research characteristics, difficulties, and recommended databases
Theme parks are among the fastest developing attractions in the tourism sector, still the researches on them are rather few. Research and literature on theme parks go back to the last 30 to 40 years, as parks in the modern sense of the word appeared after the 1950s, only. Most of the studies deal with marketing problems and opportunities, mental maps, or segmentation strategies; others look at the opportunities of smaller and larger parks in a given region. Almost all books written on the system of tourism, tourism geography or tourism economics and management mention theme parks when raising examples for man-made attractions.

The academic research of theme parks is a topic hardly visible in Hungary, not only in domestic tourism geography but also in the researches of other disciplines. As a result of this Hungarian literature on theme parks is very limited, a very few authors have devoted time to write an essay or two in this subject. Of the few who did so, Puczko László and Rátz Tamara must be mentioned, who are practically the only Hungarian researchers of this field. In my opinion the main reasons for the lack of such researches are as follows:

- theme parks have appeared in Hungary in the last few years, only (exception from this are the funfairs with classic entertainment functions, making the basis of the development of today’s theme parks),
- their number is still limited and they are concentrated spatially,
- actors of the business sector are hardly accessible for the academic researches, a reason for which is the value of the information. An analysis of this type requires the comparison of the respective locations, for which actors are reluctant to provide data, referring to the protection of their business secrets.

In the last third of the first decade of the 2000s we can see the more and more frequent appearance of the promotion of the supply of theme parks in the development directions of the tender systems. Calls for tenders and the preparation of the scientifically established evaluation system of the bids require professional studies, which might be a motivation to conduct studies in this area. For the introduction of the theme parks and the analysis of their market positions statistical databases are only available at the international level, which are regularly published by TEA [1] and ERA [2]. TEA is an international non-for-profit organisation gathering theme attractions, with over 500 economic organisation members now from 39 countries: operators, planners and builders of theme attractions. ERA is an international consulting company that focuses on the economic analysis of establishments concentrated on entertainment and recreation. During the data collection I wanted to show the latest data in each case and where possible, and also to demonstrate the temporal and spatial change.

[1] TEA: Themed Entertainment Association

II. Theme routes

9. Preliminaries from tourism history

The cultural historical preliminaries of theme routes lead us back to the ancient times, when several “cultural theme routes” were born during the development of the travel industry. Among the cultural routes, pilgrimages are of selected importance, as they were the most important theme routes in the Medieval Times. In the New Era, a growing number of the nobility and a part of the bourgeois class were involved in visits to the well-known destinations of Western Europe in the framework of a cultural route. In the first half of the 20th century, as a consequence of the growing popularity of active tourism, routes were designated all over Europe (the most famous of which in Hungary is probably the National Blue Hiking Trail whose full length was designated in 1953). Wine routes were also born in the first half of 20th century in Pfalz, followed by others along the Rhine River and then making a network all over the continent. The Route of St. of James Compostela is considered the first cultural route (being one of the most visited holy places in the Medieval Times, already), which was officially declared a theme route in 1987 by the Council of Europe (this is when the European Institute of Cultural Routes was founded in Luxembourg). Theme routes that are the most popular today were founded in the 1990s, but the number of their visitors has been growing at an extremely rapid pace since the early 2000s, only. Popular routes are film tourism routes (the first being Sex and the City founded 1999), cultural routes (e.g. the Loire Valley Chateaus route) and geotourism routes (like the Geopark network founded in 1997). In their interpretation, a cultural route is a theme route whose topic is based on culture. A feature of complex geotourism is that in addition to geological heritage they also introduce values of biology, anthropology, ethnography and other cultural and historical values. Film tourism consists of theme routes linking the shooting premises of well known film hits and attraction elements related to film series.
In Hungary the initiatives for the foundation of the first theme route were made after the systemic change (the Baroque Route was the first to be admitted among the cultural routes by the Council of Europe), renowned routes now in Hungary are the Villány-Siklós Wine Route (1994), but the majority of these routes were founded after the accession of the country to the European Union, using Hungarian state and European Union resources (Palóc Route in 2005).

10. Operation of the market

In order to understand the operation of the market we have to take into consideration the demand and supply elements, parallel to emphasising the importance of the intermediary sector creating the connection between the two.

When discussing the birth of theme routes we must mention that both in Europe and Hungary, the European Union plays an outstanding role in the initial financing of the routes, offering considerable amounts of support for their establishment. The development of the theme routes is given a significant prestige by the accession to the routes of the Council of Europe, and an even greater recognition is the award of the world heritage title. The Union wishes to increase the popularity of European culture by awarding the support, securing the primacy of Europe among the tourism macro-regions of the world. On the other hand, the strengthening of the European identity and the mediation of the basic values of the Council of Europe also play a significant role.

The operation of the market also involves the 3 groups of the theme routes, as there are visited, less visited and absolutely unknown routes among them. Unfortunately the latter category is most typical in Hungary (and their number is still increasing), for which it is partly the operational incompetence of the mediating sector to blame. Of course the competition among the regions for the creation of a larger number of theme routes is also a problem. The leading position in the number of routes is held by the region of Middle Transdanubia (40 routes counted), followed by the region of North Hungary. Regions look at the creation of theme routes as one of the most important tools of rural development, while the municipal governments do not seem to be keen on the financial support of this grandiose idea.

Among the operational features of the market we have to mention that it is in vain to continuously increase supply if this information does not reach tourists on the demand side. To improve the operation of the mediating sector, the marketing activity of the respective routes should be intensified, travel agencies should be more active in offering visited theme routes to their clients, while the state should increase the amount of supports for research and development. Unfortunately the theme routes maintained by associations and private persons lack both the financial means and the relationship systems for this, and even their cooperation is rather problematic. Also, the creation of a single image and logo are important, as is the updating and advertisement of event calendars and websites.

A characteristic feature of the theme routes is their continuous development, the routes plans described earlier (Puczko-Rátz, 2000) have been obsolete for long. At that time the duration of the introduction of theme route was maximised at two hours, now it exceeds 3 and half hours at the film tourism theme route called Sex and the City. The number of attractions was earlier maximised at 20, now it is over 40 at the formerly mentioned film tourism theme route.

10.1. Characteristics of the supply

When discussing the demand and supply factors, we have to take into consideration that theme routes are rather different from each other (as they connect attractions of completely different types), so it is often very difficult to apply the same template for them.

Attractions and their infrastructure and suprastructure features should be separately discussed in accordance with the groupings. From among the ways of grouping theme routes can actually be categorised on geographical grounds (maybe on the basis of their catchment areas) and according to their topics. In a geographical approach we can distinguish among theme routes of local, regional, national and international catchment area. A vital element of theme routes is continuous expansion and their goal is usually to develop into a route of international recognition (if this is not the case, the very reason for the existence of the theme route can be questioned) – but it all necessitates the exploration of a good theme.

At least as important is the presence of the infrastructure and suprastructure conditions, and the continuous development of these. Transport on the theme routes requires various transport means to approach the
attractions, from local public transport through bicycle and coaches to cars. The diversification of transport tools is a basic factor now, the Andrássy street in Budapest can be travelled by the Millennium Underground, but it can also be managed by bicycle, bus and car. Of course it is not possible to build out such a transport network everywhere, but it should be a conscious effort to allow the use of as many transport vehicles as possible when accessing and travelling a theme route. In the recent years we have seen a revolutionary development of communication devices and their use on the theme routes. GPS should be mentioned in this place, together with mobile phones and modern touchscreen devices.

At theme routes the primary suprastructure conditions are decisive, as secondary suprastructure conditions (retail trade, auxiliary services, money exchange places, renting facilities and personal services) only play an indirect role. Among the primary suprastructure conditions, catering facilities play an important role at local, regional, national and international levels as well, while accommodation is more important for national and international theme routes.

Classification of theme routes according to their topics

1. Cultural routes

Cultural routes include chateau routes, castle routes, pilgrimage routes, historical routes, arts routes, theme routes of film tourism, and wine and gastronomy routes (discussed separately in sub-chapter 2). Among them it is pilgrimage routes and theme routes of film tourism that attract the largest number of tourists in the world, and both are characterised by the provision of opportunity to manage the route by coach and car. Theme routes attracting millions of tourists have a significant demand for accommodation and catering facilities.

As regards attractions, the following ones can be distinguished:

– Buildings reminiscent of historical times (Chateau Route, Route of North Castles)

– Unique architectural works (Baroque Route, Secession Style buildings in Budapest hallmarked by the name of Ödön Lechner and his contemporaries)

– Scenes of historical events (Amber Route, Bunker Route)

– Stations in the lives of famous people (Liszt Route, Sissi Route, Mozart Route)

– Living spaces coming from the social division of labour (Andrássy street)

– Cultural traditions (Palóc Route, Viking Route, Route of Iron Culture, Textile Route)

– Spiritual sphere (Mary Route, Route of St. Elizabeth, Route of St. Martin)

– Works significant in cinematography history (Lord of the Rings theme route in New Zealand)

**Figure 1:** St- Martin’s Route in Szombathely
2. Wine and gastronomy routes

They are theme routes that can be taken as parts of the cultural routes, with the objective to introduce the traditions of local gastronomy culture.

– Gastronomy (Plums Route, Route of summer pastures)
– The world of production and work (Horseradish Route, Watermills Route from Velem to Röjtökmuzsaj)
– Wine routes (Tokaj-Hegyalja wine route, Eger wine route)

Wine and gastronomy routes have special demands as regards infrastructure and suprastructure. Although catering is possible on the spot, organisers have to provide travel and accommodation for the guest of such theme routes, because of the consumption of alcoholic beverages.

3. Nature routes

Natural attractions are connected by green routes all over Europe (Danube-Ipoly Green route), but they also include routes demonstrating prehistoric habitats (Ipolytarnóc Route), geotourism routes demonstrating geological and geomorphologic values, and also built-out hiking paths that are usually named after the colour of the signalling. A characteristic feature of these routes is that travelling in the nature routes often leads to the growing popularity of walking and cycling. At the establishment of the infrastructure and suprastructure thus these needs must be taken into consideration, which is especially important in connection with cycling tourism (cycling hotels, bicycle repair shops etc.).

10.2. Characteristics of the demand

Theme routes set as a goal the persuasion of several target groups, i.e. they offer adventures to everyone, irrespective of their age, gender, interests and income positions.

Primary and secondary school students usually have access to the attraction elements of theme routes as a supplement of their studies, during class excursions and tour competitions. For this generation an objective is teach and play, as gathering information is the most simple for them with playful methods. Another important aspect in their case is the maintenance of the interest and the provision of an opportunity of exploration, as their
interests cover a broad range of topics at this age. In the framework of youth tourism it is pupils and students who can be most easily persuaded to visit nature routes and participate in cultural and heritage tourism.

The task of the teachers is to organise quality programmes. For teachers who find recreation and good atmosphere as important as learning, a route can be a tool of teach and play. Teachers are interested in gaining knowledge, so they can be most easily persuaded to visit cultural routes.

For families with children it is important to explore cultural heritage, their main motivation is the creation of quality entertainment. Most attractive for them are chateau routes, castle routes, art history routes and theme routes related to famous persons.

Young adult intellectuals are most curious about novelties and new types of attractions; they seem to follow the latest tendencies, so they seem to be most interested in film tourism routes.

Explorers always search new things during their excursions, of decisive importance for them are individual and unique things, the route for them carries the message ‘I’ve got to see this’. According to surveys, they visit geotourism routes.

Hikers and excursionists usually choose a route on the basis of some idea or topic; they are interested in one particular topic. Their interest is matched both by nature and cultural routes, but they prefer to manage the route on foot or by bicycle.

Those interested in spiritual things are open to different religious disciplines, philosophies and psychology, and their primary range of interest is in accordance with this. They are happy to participate in pilgrimages or other religious history tours (European Route of the Jewish Heritage).

Academic researchers can be museologists, university lecturers or maybe college students for whom the auxiliary information and details may also be important.

The group of those who have left the country knows that their ancestors lived in this region, so for them it is important to find their roots, a slogan form them is “Hungarian blood in running in my veins”. They participate in VFR tourism (visiting friends and relatives) and make a large target group of theme routes. They can be approached not by the mediating sector in the first place but by the families receiving them.

As regard pensioners, their interest lies in their environment and history, so the message of the route for this target group is ‘I want to get here, I want to see this once in my life’.

When looking at the school education of the participants, it is striking that theme routes are most popular among those with secondary and even more so with higher education schooling.

11. Trends in Europe and Hungary

Hungary, as a member state of the European Union, adapts to the European trends, and the theme routes created in Hungary are eligible for the support of the Union (regional operational programmes, Interreg tenders etc.) just like in other member states. The Hungarian theme routes would also like to be admitted the list of the Council of Europe (and the routes of the world heritage) which includes both natural and cultural routes. Following the latest trends, in Hungary too geotourism routes were founded (in addition to the already approved Novohrad-Nógrád Geopark, the tender of the Bakony-Balaton route is going to be submitted soon). The number of geotourism routes in Europe has come close to forty (e.g. Vulkaneifel European Geopark in Germany). Hungary is lagging behind in the field of film tourism, although the number of their visitors is increasing (e.g. the Harry Potter route in Great Britain), and Budapest (the inner city, or the Korda studio in Etyek) has excellent conditions for the implementation. A European trend is the making of so-called movie map, in travel guides film tourism routes are signed (with their GPS coordinates), and now even the maps and flyers indicate the most famous theme routes and give a brief description of them (unfortunately in Hungary there are very few such initiatives for the time being).

Figure 2: The Mary pilgrimage route
The construction of pilgrimage routes in continuous, but the number of their visitors lags far behind the figure typical in the Union member states. For the harmonisation of the developments, a Hungarian Institute of European Routes could be established.

12. Environmental conditions of the operation of the market

The Hungarian National Tourism Development Strategy deals with the issue of the theme routes, among other things. In the words of the Strategy, a theme route is "the integration of sights, attractions and programmes at different locations but connected to the same common theme into one single tourism product. The objective of the creation of theme routes is to integrate sights that are not major attraction in themselves; thereby the value of the joint attraction increases" (NTS, p. 16).

In tourism development, the development of theme routes is an important opportunity, as they collect experiences important for the visitors, and makes it easier for them to satisfy their needs with the large amount of information that they get. In rural areas theme routes can become the primary development factors, because the total of the sights of interests and values is more attractive for the visitors who would not leave home to see the respective area for its individual values. Although the research on theme routes is in its infancy, it is certain that visitors to theme routes stay longer and spend more, which is an attractive alternative (also) for most rural regions.

Theme routes are mentioned in the Hungarian National Tourism Development Strategy mostly as a means of cross-border initiatives. It is important for two reasons: on the one hand, because the neighbours of Hungary will show up as competitors in the short and medium run, due to their natural endowments and tourism attractions, the only competitive advantage of Hungary for the time being is the lagging infrastructure of the neighbours; on the other hand, it is advisable to use interregional cooperation possibilities much more efficiently, as they would allow the development of border regions and also of some tourism products, including theme routes.

When this achieved, for the Hungarian minority living in the neighbour countries a motivation would be there to make it easier for them to stay where they were born.

Cross-border initiatives are among the horizontal objectives of the NTDS, including the strengthening capacity of the Hungarian inhabited regions over the borders to keep their populations by the development of competitive tourism activities, and the establishment of cooperations with the competitors – using the still existing competitive advantage – which will reinforce the role of Hungary as a regional tourism centre for the cross-border regions that will probably show a fast development in the future.
In order to implement this, most important is the development of human resources and through this the promotion of access to European Union resources. Further important tasks are the establishment and development of various networks, and the creation of tourism destination management organisations in the cross-border areas at micro-regional level, and later the establishment of cooperations which will promote tourism and economic development on both sides of the border.

In developments, regions already possessing cross-border relations have an important role. Organisations responsible for the developments can be the Government Office for Hungarian Minorities Abroad, businesses and the non-governmental organisations; their main tasks include planning and tendering.

13. Cooperation with other products, synergy effect

The development of theme routes into tourism products has become a major issue in tourism development in the recent years, as these routes offer excellent opportunities for the improvement of less developed and less popular regions and also for the establishment of local development cooperations. As a consequence, tourists not only stay longer but also spend more. Using the synergy effects creates stronger attraction, tourists travel to more places and their money reaches more stakeholders.

Theme routes may also contain ‘pro poor’ factors, i.e. they may have factors offering business opportunities for the less affluent people. (Pro-Poor Tourism is a kind of approach to tourism development and management, in which the poorer can also participate efficiently in tourism product development and thereby can have revenues.) In places where small tourism businesses try to grow, an opportunity is to unite them in a theme route.

Theme routes integrating the values of the respective region may be built on precious cultural heritage; in Europe the most common type is the wine and gastronomy related routes. In some other parts of the world the concept of theme routes is mainly for the development of the tourism of small towns.

14. The practice of theme route development

There are seven important factors that must be taken into consideration at the development of theme routes.

1. The creation of the theme route must be based on serious market research that identifies the target consumers and their needs and continuously follows the changing market demands. Stakeholders must make sure that the local concepts and strategies fit the latest tourism trends. If the budget is tight, the respective destination can be linked to local or regional tourism organisations or to the local universities or colleges so that students or volunteers can participate in the market research.

2. An in-depth survey must be carried out to explore the natural and cultural values of the given region for use in tourism. This may be important as it allows us to define those criteria on the basis of which the respective factors of the route might be selected; this safeguards that the theme route gives a single and high quality experience. The survey should look at the natural environment, the man-made environment and other human and cultural factors. In case of the already existing products we must make sure that their operation is up-to-date and follows the latest tourism trends. In addition, the association to be created must define a minimum quality level for its members, preferably at the level of an international evaluation system – or above it. Failing to do so may risk the actual existence of the quality experience.

3. All opportunities must be thoroughly looked at one by one, together with the specific market potential of the area, and the possibilities must be integrated into a macro-level national strategic plan to make sure that they fit into the planning practice and activity of tourism in the given region. It is very important to have consultations between the local and regional organisations on the strategies and the future tasks. This may guarantee that the plan of the route imagined is integrated into the macro-regional plans and also allows it to be integrated among the wider planning objectives.

4. The number and size of participating businesses in the given theme route must be precisely defined – their active participation is of vital importance for the success of the theme route, as they are the final mediators of the experiences towards the visitors. The individual service providers must well complement each other in the field of special endowments and general services; also, their participation must be secured right from the beginning of the theme route. It is of basic importance to work out individual portfolios for the participants, in accordance with the precisely defined strategic objectives, and each member should be able to meet the
requirements in this portfolio. It is also important to include consultants in the management and in the implementation of the respective tasks so that the quality of the service providers’ attitude and skills should be continuously maintained. It is also important to have a diverse range of products and avoid the over-representation of certain sectors (e.g. accommodations), because each and every experience in the expectations of the guests must appear. It is also advised to avoid the dominance of certain members so that they should not be able to assert their individual or political interests in the management.

5. Members must create and market a well interpretable clear brand for the given theme route, depending on what markets they want to target and what demands the target consumers have. It is very important that the sights of interest on the route should be evaluated objectively; their value should be neither overrated nor underrated.

6. Members must decide on the management and operational conditions they wish to apply, in order to avoid problems in the maintenance of the theme route. They must have a clear and precise strategic plan for the creation of the work plan and organisation of the daily routine activities. This requires an operational plan, which guarantees good communication between the organisation and the members and the clear division of responsibilities tasks, so that the separation of the management and the rest of the members, which would jeopardize operation, can be avoided.

7. The last step is of critical importance for the survival of the organisation, for its planning and its financial stability. Members must have a long-term financial thinking in order to allow visitors to assess positively the given theme route. When calculating the return on the investments it must be considered that it takes 20 to 30 years for most theme routes to become mature and to offer basic economic advantages and give realistic results. On the other hand, feasible and realistic objectives and plans must be made in the short run too.

These steps are relevant mainly for developments initiated by entrepreneurs, but they can also be applied to the planning by the public sector. Effective tourism planning and operation require, after all, effective cooperation among the organisations of the public and the business sector responsible for tourism development in the given destination. There are functions that can operate more efficiently at the public sector level – like macro-level planning –, whereas the elaboration of the given programmes and services and their integration into the national plans is basically the task of the business sector. In connection with the development of the given theme route as a tourism product, basic elements are innovative product development, infrastructure and access.

Innovative product development:

Infrastructure: it means basic road and railway network allowing the traffic of the tourists, on the one hand, and it involves, on the other hand, signs, information posts, rest and sanitary places, public toilets, buffets, shops and fuel filling stations, and in case of longer routes also accommodation.

Access: in regional tourism development, transportation access is a primary thing. Direct access from a motorway is a huge help in development. A theme route that is not within one day’s reach from its main sending areas must provide, in addition to the necessary attractions, a tourist centre and also an accommodation centre.

15. Research on theme routes, databases

In macro-economic sense the research of the theme routes is recommended at national and regional level. During national level researches, recommended research topics include the characteristics of marketing and branding, export revenues, tourism trends, taxation, regulatory and financing characteristics, the level of integration into the tourism sector, accreditation and the issues of quality.

Researching regional features it is advisable to look at regional characteristics and features, image and brand, marketing and organisational features, infrastructure, the spending of tourists and the role of the municipal governments. The hierarchical approach above is useful for tourism planning in the broader sense of the word, for both the public sector and tourism industry, but the micro-level stays out of these researches. This level can be approached by the research on small enterprises, service providers, tourists, marketing efficiency, and the success factors typical of the destination in general.
Bibliography


10. fejezet - Éva Happ - Anikó Husz: MICE tourism

1. Preliminaries in history/social history/culture history

MICE tourism is an acronym evolved from the shortening of the English phrases (Meetings, Incentives, Conferences, and Exhibitions). In Hungarian language the phrases MICE tourism, business tourism are used, which include the following segments:

- Business travels, business meetings, meetings
- Incentive travels
- Organization of conferences and workshops
- Organization of exhibitions

In the international tourism market, recently this type of tourism is also called Meetings Industry that has no appropriate translation in the Hungarian language yet.

MICE tourism means trips where everything is related with work. Thus the traveller is travelling during working hours, in interest of the employer and the expenses are covered by the employer.

MICE tourists are representatives of their profession, field, thus successful co-operations established during the business meetings induce development also in other branches. MICE guests often return to the same destination as leisure tourists as well.

Over the past centuries, people started to travel to discover new cultures and locations, and sell their produced goods. The first business trips can be related to the Phoenicians and Romans later on, who maintained active trade relations within their empire. Desire to travel was inspired by the aim of trade extension and conquest. The “guest friends treaty” used by the Greeks was a seed of business meetings and agreements, since it ensured accommodation, catering and protection to the foreigner who identified himself with a symbolic object.

Establishment of the Roman road network, launching of post carriages and building of so-called horse shift sites and lodging houses, enabled relaxation and undisturbed travel of soldiers and dealers already in the 1st century A.D.

After the fall of the Roman Empire, security, traffic and also trade relations were exacerbated. The Middle Ages were primarily characterized by the spread of Christianity, by Crusades. As MICE tourism, we can mention travels to changing residences of the kings and their households, and meetings of the nobility in estate assemblies, votes. As the main centres of scientific life, famous universities (Oxford, Vienna, Leiden, Pécs) were established during the 12th-15th centuries.

The Bourgeois class of the Renaissance era realized during travelling that the discovery of new regions can mean new trade markets, enrichment and power as well. Trips of the sons of rich aristocrat families participating in Grand Tours can be comprehended as study tours or even as business travels, since the youth later could utilize in their profession the experiences gained in large European cities.

The industrial revolution in Europe between 1750 and 1850 brought significant changes in tourism as well. In the middle of the 19th century business travellers appeared who introduced and tried to sell the product samples of their company, and participated in important business meetings. Establishment of railways and later on the launch of navy shipping enabled not only business oriented travels of people, but also the intensification of trade and business relations. Luxury ships and luxury trains became favoured places of company leaders and business meetings. Exclusive restaurants of hotels and cafés were typical sites of “business made at white tables”.
Appearance of aviation meant the beginning of a new era in business tourism and convenience and time sparing for business travellers.

Recently, due to computers and the Internet, business partners can hold video conferences, business meetings without leaving their headquarters. However, this cannot be called business tourism, since they do not require tourism services and they are not able to substitute personal networking.

The history of exhibitions and markets too can be traced back to ancient European markets which became regional centres over time, especially at the meeting points of mainland and water routes. After religious services, people gathered on the market square and offered different articles for personal use for buying and exchange. Written mentioning of the first market in a certificate is from 629 A.D., and it was St. Denis located next to Paris where traders used to meet. Historically underpinned trade centres existed in Cologne (973), Mainz (975), and in 1240 Frankfurt was first mentioned as a “market centre”.

Markets reflected the contemporary economic circumstances. Bartering of the early ages evolved to product trade by the Middle Ages, products had values and traders earned income based on the turnover. An extended trade network evolved, spreading from England to South-Italy, from Poland to Spain. From north towards south mainly delicate textile industry products were traded, while oriental products, such as spices, leather goods, furs and precious metals were transported from the south. German cities lying in the geographical focus point played an especially important role, among them Frankfurt and Leipzig retained this position.

Industrialization speeding up in the 19th century, and appearance of the railways initiated structural change in trading as well. Markets turned into exhibition centres of new industrial products. The first European “sample market” that can be seen as a predecessor of specialized markets was organized in Leipzig, in 1890. The success of specialized markets that are characterized by dynamism, flexibility and exchange of new ideas, is proven by the past 120 years.

Table 1  SWOT analysis of the Hungarian MICE tourism

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Good price-quality ratio ☐ Central geographical position ☐ Active scientific background ☐ Professional and creative organizers ☐ General tourism attractiveness ☐ Safety</td>
<td>☐ Lack of a conference centre with appropriate capacity ☐ Infrastructural weaknesses ☐ Budapest-centred spatial structure</td>
</tr>
<tr>
<td>Opportunities</td>
<td>Threats</td>
</tr>
<tr>
<td>☐ Construction of a conference centre with appropriate capacity ☐ Strengthening of the Conference Ambassador Programme ☐ Initiation of professional co-operations</td>
<td>☐ Lagging behind due to infrastructural weaknesses ☐ Development of neighbouring countries ☐ General economic recession</td>
</tr>
</tbody>
</table>

Source: National Tourism Development Strategy 2005-2013

2. The supply side

Table 2  Supply chain in the different types of MICE tourism

<table>
<thead>
<tr>
<th>Type of MICE</th>
<th>Consumer</th>
<th>Buyer</th>
<th>Mediator</th>
<th>Transit</th>
<th>Supply of destination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business travel</td>
<td>Traveller</td>
<td>Employer</td>
<td>Internet Travel agency Travel organizer within the company</td>
<td>Transport (aviation, railway, public road, water)</td>
<td>Accommodation, catering, local transport + location of the meeting/summit</td>
</tr>
<tr>
<td>Conference</td>
<td>Participant</td>
<td>-</td>
<td>Organization – client PCO (conference organizer) Direct booking in case of travel and accommodation</td>
<td>Transport (aviation, railway, public road, water)</td>
<td>Accommodation, catering, local transport + location of the conference</td>
</tr>
</tbody>
</table>
Exhibition | Exhibitor | - | Exhibition organizer | Can be a direct booking in case of travel and accommodation | Transport (aviation, railway, public road, water) | Accommodation, catering, local transport + exhibition place + exhibition related service providers (furniture, flowers etc.)

Incentive trip | Participant or organizer within the company | - | Incentive travel agency | Transport (aviation, railway, public road, water) | Accommodation, catering, local transport

Source: based on Swarbrooke, 2001 constructed by: Happ, 2010

Categorization of available services:

- Compulsory services: they are present in every field of MICE (e.g. transport)
- Sector-specific services: these serves only one segment of MICE tourism (e.g. exhibition venues)
- Facultative services: they diversify supply, but are not fundamental supply elements of MICE tourism (e.g. entertainment facilities)

Actors of the supply side (economic providers):

- destinations, places, traffic, transport, accommodation, complementary services.

**Destination**

It is a receiving area that incorporates the supply element of MICE tourism. The destination includes several types of actors, e.g. accommodations, restaurants, programme organizers, municipalities, clusters, transport companies, Tourinform offices, commercial units (souvenir shops), car rentals etc. The actors’ co-operation and joint marketing efforts are very important.

**Venue**

It is the most important service of the destination. The venue allows the organization of a conference, business meeting, exhibition, incentive tour.

Categorization opportunity:

a. based on location: urban – rural location
b. based on size (capacity)
c. based on the aim of establishment:
   - built for business tourism purposes: conference centre, exhibition area, business hotel
   - location built for other purposes: university, special locations: museum, sport hall, historical site (castle), theme park, transport means (ship, train)

**Table 3 Advantages and disadvantages of special event venues**

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Special, memorable</td>
<td>Size</td>
</tr>
<tr>
<td>Competitive price</td>
<td>No accommodation opportunities</td>
</tr>
<tr>
<td>Optimal for small group meetings</td>
<td>Restricted technical equipments</td>
</tr>
<tr>
<td>High quality, standard</td>
<td>Less prepared professionals</td>
</tr>
</tbody>
</table>
Transportation

Requirements for the accessibility of the receiving area, for solving local transportation, and for organizing facultative programmes:

- aviation (scheduled flight, charter flight, private flight)
- railway transport (also can serve as location)
- public road transport
- water transport (also can serve as a location)

Accommodation

Events with large number of participants might require accommodations with different levels of quality (e.g. organizers of conferences reserve different qualities at different prices).

Advantage of business hotel: it is an advantage that the venue and accommodation, and catering are all located at the same place.

Additional services

- facultative programme opportunities,
- technical services (lighting and sound technique, translator equipment, registration systems, admittance etc.),
- translators,
- hostesses,
- other services (renting of furniture, flower, decoration).

3. Characteristics of demand

Due to its complexity, business tourism is very difficult to measure. Within the MICE tourism, we have much more data on the participants of conferences and business travellers, than on incentive travels and visitors of exhibitions.

Three actors of the demand side:

- firms,
- associations, organizations,
- public sector.

Table 4 Differences between the demand of leisure and business tourism

<table>
<thead>
<tr>
<th></th>
<th>Leisure tourism</th>
<th>Business tourism</th>
<th>But!</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who pays? (covering expenses)</td>
<td>Tourist</td>
<td>Employer or organization</td>
<td>Private travellers pay for their own trips</td>
</tr>
<tr>
<td>Who makes the decision about the travel?</td>
<td>Tourist</td>
<td>Organizer of the meeting/ conference/ exhibition/ incentive trip</td>
<td>The organizers often ask for the opinion of the participants about the next location</td>
</tr>
</tbody>
</table>
Timing of the travel | Longer trips in the peak season + weekend travels | All year long/ from Monday to Friday | MICE tourism is less intense in July and August
---|---|---|---
Timing of the reservation | A few months before the travel + in case of short stays, a few days before | Shortly before | Organization of large conferences is launched sometimes years before the event. In case of leisure tourism, last minute is typical
Travellers | Everybody who has discretionary income and leisure time | Assignee, member of the organization | In case of MICE tourism, there is often an accompanying person who travels for non-business purposes
Destination | All types (cities, coastal areas, mountain areas, villages etc.) | Centrally located cities of economically developed countries | In case of incentive tourism, places of leisure tourism are used Smaller conferences are organized in rural venues as well

Source: based on Davidson, 1994 own construction: Happ, 2010

The following factors influence the demand for business tourism in a given destination:

a. state of the economy, level of economic development,
b. value of the national currency,
c. political stability,
d. expenses of the travel,
e. historical and/or cultural relation with other places,
f. industrial structure,
g. governmental policy.

Different types of segmentation can be related to the demand of MICE:

- Direct or indirect (through travel agency) reservation
- Motivation (participation in a conference, business trip etc.)
- Nationality
- Gender
- Frequency of the travel
- Age
- Method of travel, transportation mean used
- International or domestic
- Short or long stay
- Seasonality

Demand can be characterized based on the *branch* that it is associated with. The largest demand within MICE tourism can be experienced in IT, economic and medical sciences sectors.
Seasonality appears as demand characteristic as well, though it is often mentioned that one of the advantages of business tourism is that it is less dependent on seasons than leisure tourism. It is definitely true that the season is much longer and less characteristic, nevertheless there is a kind of seasonality in business tourism as well. Summer months of the year are less typical for travelling, and in case of weekly seasonality, the busiest period is from Monday to Friday.

In geographical sense, demand can be domestic, inbound and outbound tourism. There are differences in demand between continents, regions and countries as well. Worldwide income of MICE tourism in 2009 was 795 billions of USD, 31% of which was realized in Europe and 30% in the USA.

The demand of MICE tourism can be categorized also based on the motivation: business travellers, conference participants, visitors of exhibitions, and incentive travellers. Within Europe, 18% of international travels are business motivated, while the other MICE segments have only 6% in total (48% of which is conference tourism, 42% exhibitions, and 10% incentive travels). Germany, France and Switzerland have the largest shares in MICE tourism; they account for approximately one-third of the European MICE tourism.

4. Functioning of the MICE tourism market, types of MICE tourism

4.1. Business travels

The group of business travels includes business meetings, company events held outside the firm, the so called off-site events, and company, business training. MICE travels are also used with the phrase of Business Travel that is already common in Hungarian too.

In the last decades a restructuring of the world economy can be witnessed. Both large and small companies have international relations, thus the number of travelling business people is permanently increasing. Permeability of borders and also the enlargement of the European Union enhance this process.

Personal computers that are always carried by business travellers contain important databases of business meetings. The needs of travellers require that they can use these both in transportation means and accommodations. The so called “office on the board” service is spreading on business classes of planes. Recently, Business Classes of several airline companies – among them Delta and Lufthansa – offer on-line access on their flights. On American domestic flights, e.g. passengers of business class can track the latest stock market news on on-board monitors. And if they wish, they can also take part in distance conference between the plane and the ground venues, with the help of webcams and computers.

It is common in the United States that managers who have not made their booking early enough, face difficulties in finding an accommodation. As a consequence, a new type of service was born: the Manhattan Club and the Marriott hotel chain introduced a special version of holiday rights in the field of business travels. Companies can purchase the right of using some hotel rooms for their business travellers. By the end of the 1990s, another type of accommodation evolved that enables longer stay at a given place. This is the so-called apartment hotel. The first Hungarian apartment hotel was opened by Marriott in Budapest, and it is located in the Millennium Centre building constructed in 1997. Apartments of the Millennium Court Marriott Executive are different in size and can provide both the cosiness of a flat and convenience of a hotel service. The staff cleans up three times a week, and also arranges the necessary shopping based on a list provided by the guest.

The World Trade Centres (WTC) are worldwide important actors of business travels. Institutions belonging to the WTC-network, first of all, have to include high-quality venues that are appropriate to receive trade delegations, and they must also have well-prepared professionals to provide commercial information, as well as possess all of the equipment that are needed for the high-quality service of business travellers. Every centre has its own membership, and altogether they count more than 400 thousand members. WTC members get a membership card that ensures privileges in every similar centre in the world. Such privileges can be e.g. discounted hotel rates, the use of WTC facilities for meetings, and using the computer network.

In Hungary, the most frequent venues of business meetings are offices of companies and organizations. Off-site meetings, for example in a hotel, are organized if the internal rooms of the organization are not big enough regarding their capacity or number, or if the participants should (physically and also spatially) be separated from the daily tasks. The accommodation is, however, booked not by the guest but by the organizing company/institution, typically in the form of contingents. These contingents (prices, capacity and services) are
agreed and fixed yearly (or for several years) by the responsible department – marketing, human resources –, and by the hotel (or centre of the chain). The needs of business people have to be considered at the design of the rooms: large table, controllable room temperature, good lighting and convenient chair.

In the past years, Hungarian hotels have spent a lot on the establishment and development of their own Business Centres. However, guests arriving for business meetings now carry their own, personally used technical tools (Notebook, iPod, iPhone, iPad), hence nowadays we can call these “moving offices”. Establishment and maintenance of WiFi networks is already a basic requirement in hotels receiving business tourists. This leads to the slow disappearance of Business Centres in the classic sense of the word.

Average duration of business meeting is no longer than 1.5–2 days, that are fully occupied by the professional programmes. Business meetings are often followed by company programmes, such as visiting a production plant, the co-located organization of which in total decreases the expenses and time required.

Increasing demands of business clients is accompanied by (strong) price sensibility. Price sensibility is reflected in the effort of companies to diminish or maximize not only the amount of resources can be used to cover accommodation – maximum three star hotel –, but also that of transport (e.g. low-cost flight tickets) and other related services. The companies usually determine the budget and venue of organizational events at the beginning of the year, and the decision is usually jointly made by the highest leader and the leader of human resources issues.

In Hungary, professional conferences and other meetings are organized typically in the companies’ centres, affiliation, and interestingly one-third of the large companies have their own accommodations or holiday resorts. At the same, the most frequent venue of professional conferences, meetings or off-siting are restaurants. While such events in Budapest are usually hosted by the office building or the congress centre, the use of resort complexes is preferred on the countryside.

In case of large companies’ decisionmaking, the price/value ratio of services, the quality level of available services and the infrastructure of the venue play an outstanding role at every type of events. The firms consider catering, safety, tidiness and accessibility of the place important, together with the quality and state of the environment.

4.2. Incentive travels

Incentive travel basically means award travel which is an incentive and appreciative present for the well-done job, for achieving or exceeding a given goal. The primary purpose of this travel is relaxation, entertainment and recreation.

Incentive travels provide opportunity for colleagues to get to know each other better in an environment different for the working place, and, through shared experiences, they can support better and more effective teamwork, and also increase mutual attention.

This performance enhancement tool, the incentive trip has been in use since the 1960s in the United States, as a prize of sales competitions. Its call probably sounded like this: “You can visit the cities of the exotic Thailand, if you sell ten thousand sewing machines until the end of the year.”

Later, this form started to spread in Western Europe as well. Recently Spain, France, the Benelux states and Great-Britain are the top countries in this sense. This type of incentive was more typically used by large companies at the beginning. Nowadays most of the incentive tours are organized for small- and medium sized enterprises.

Determinant factors of organizing incentive travels are as follows:

- prestige associated with the location and services
- novelty, uniqueness, popularity and trendiness of the location
- supply of relaxation and sport opportunities and leisure time programmes
- availability of wellness services
- weather.
To organize a successful incentive travel, the travel agent has to know the idea and expectations of the company: what is the aim of the travel, how large is the group, what is the field of interest of the travellers and which age group they belong to.

Based on the type/character of the travel we can differentiate between the following travels:

- holiday travels,
- city visits,
- cultural travels,
- adventure tours,
- ski tours,
- exotic travels, destinations,
- luxury boat tours,
- travel on luxury trains,
- sport events,
- festivals, carnivals,
- or even circuits.

It is important that the route has to be characterized by wit, creativity and quality at the same time. The number of participants in such travels varies between broad ranges, from 30 to 300 persons on average. The tours are always very attractive and offer a special experience – these extra opportunities are important elements of the system that provides incentives to achieve higher quality.

Based on the type of organisation, the following types of incentive tours can be differentiated:

- Individual travel
- Group travel with holiday character
- Group travel with embedded seminar
- Group travel including visit of company subsidiary

Travel agencies specialized in organizing incentive travels offer complex tourism packages that also include outward trip, accommodation, team building programmes and exercises, sightseeing tours, excursions, catering, and also technical equipments and tour guide, if needed. Today there are travel agencies all around the world that are specialized in organizing incentive travels. Organizing and arranging incentive travels is an above average sensitive task, since the travel bears the trade name of the client company, and every mistake made can impair also the company’s goodwill.

The Euromic is an organization including best offices of 35 countries around the world that are receiving incentive guests. The “/>Euro” in its name refers to our continent, while “mic” is the acronym of the words “Meeting Incentives Conceptions”. The organization accepts only one agency from each county. Hungary is represented by Blaguss Travel since 1998. Its headquarters is in Brussels, but it has a subsidiary office in Chicago as well, since one of the largest emitting partners is the United States.

Unfortunately, the international competitiveness of the supply of incentive travels available in Hungary is weak. Also the trend of incentive tours indicates that the bookers are less and less highbrows and they order more and more simple services. Foreign bookers hold Budapest and Hungary a cheap destination and the perceived price/value ration is going down, thus they are not ready to pay the real quality level of service (that they often feel bad about later on), since incentive programmes are not much cheaper in Hungary than in other countries.
It is also observable that barriers between company meetings and reward travels are increasingly diminishing, and combined programmes appear, the so-called _concentive events_, that are combining professional and leisure programmes as well (e.g. professional meeting + production facility visit + excursion + cultural programme).

The most popular Hungarian incentive travel destinations and programmes are follows:

Farm inn – Lajosmizse; finding the sward of Atilla the Hun in the Szigetköz – Halászi; Climbing adventure track on the Shipyard Island of Óbuda; Hungaroring Adventure Park; Knights Tournament in the Lower Castle and royal feats in the Renaissance Restaurant in Visegrád.

### 4.3. Conference tourism

Conference tourism is defined as the travel and stay of participants of congresses, conferences and symposia. It is one of the fastest growing fields of tourism.

The participants arrive at the conferences with the following _motivations_:

- extending knowledge, extending professional or scientific network, establishing international relationships, training, change of experiences, acknowledgment, holding presentation, relaxation

Conference tourism requires the following _material and personal conditions_:

- Characteristics: characteristics must here be comprehended not as touristic features in the classical sense, as attractions for professionals in the case of conference tourism are more typically international acknowledgement, research work, acknowledged university
- Capacity: accommodation, transport, congress and conference centres, conference hotels, catering and sport facilities, museums, other possible locations
- Room: appropriate size, capacity, flexibility, equipment (plenary room, session rooms, exhibition hall, receiving halls, catering spaces, service area)
- Technical conditions – furniture, lighting, amplification, interpretation, audio and video connection, internet
- Event organizers: PCO – their tasks include organization, pre-arrangement and arrangement of congress, business and incentive tourism, DMC – a local enterprise that organizes services and transport of tourism and business motivated travels for the arriving groups

*Main features of congress tourism:*

- foreseeable and can be organized in advance,
- high participation fees and expenditures of the participants,
- in addition to congress programmes in the narrower sense, the participants use other tourism programmes as well,
- spending of accompanying persons arriving with conference participants ensure additional revenue,
- high number of participants of large congresses cause spasmodic bookings in hotels,
- usually pre-programmes in the days before and post-programmes in the days after the congress are organized for the participants and their accompanying persons
- it largely contributes to the aims of the place and the national tourism propaganda.

The international conference market can be segmented in different ways. We can differentiate based on the size of the sessions, on the number of participants, on the particularities of their consumer behaviour, on the topic of the conference and based on further, different features and criteria.
However, the most important criterion of segmentation is the initiator, the client who decides which type of session is required and which services are demanded. In the case of client-based distinction, the international conference market can be divided into two main segments: the market of corporate and association meetings.

The latter includes the summits of international intergovernmental organizations and non-governmental (social, non-profit) organizations, associations (Figure 1).

![Diagram of international meetings](image)

**Figure 1** Types of international meetings

Source: based on ICCA, 2008 constructed by: Happ, 2010

The group of organization meetings covers various types of events: medical conferences (the largest segment), scientific meetings, other sessions on trade, economics and social topics. Considerable differences can exist between and within the groups regarding the size, budget, duration and complexity of the conferences.

The group of company meetings is in fact a collective notion: it can be interpreted as regular or occasional sessions of companies with domestic or international network.

The internalization of scientific life, the need for communication and curiosity in results of others support conference tourism in becoming one of the fastest developing parts of tourism.

The two largest organizations that collect data and prepares studies is UIA and ICCA. The two organizations set different criteria of data collection. ICCA considers international conferences that are organized regularly, with at least 50 participants from three nations.

In the statistic of UIA we find conferences with at least 300 participants, held for at least three days and where 40% of participants arrive from at least five different countries.

International conferences can be characterised by the following data:

- **Number of international organizations**: there are at least 6000 organizations registered which organize international conferences. Nearly 60% of these have headquarters in Europe.

- **Number of international conferences**: though the economic crisis hindered the organization of conferences in 2008, based on the preliminary data and statistics as well, the market started to increase again in 2009.

- **Geographic distribution**: The favourite destination is Europe. More than 50% of conferences are organized here. However, the latest data suggest that also new, developing conference locations are starting to compete. Asian and Middle-Eastern countries permanently offer new supply elements which attract more and more conferences into the region. The improving positions of the Middle-East and Asia are unbroken since 2003; they increased their market share by 3.9% since then.

- **Average number of conference participants**: A slight but steady decrease can be experienced in the average participant number per conference. While in 2000 an average of 832 people took part in an event, this number decreased to 638 by 2008.

- **Size of the conferences**: in the last 10 years an interesting restructuring was observable in the size of conferences. While the share of large conferences with more than 5,000 participants is still around 1.5%, so
there is no considerable change, less medium sized conferences (500–5000 people) were organized, and their share decreased by some 8%. Popularity of smaller conferences (up to 500 participants) increased. This can be explained by the size of available conference centres, the frequency of conference organization, and of course with cost savings as well. The majority of international conferences had 250–499 participants.

- **Average stay**: the duration of conferences is decreasing year by year, the 4.4 days duration of 1999 was only 3.9 in 2008.

- **Timing of organization**: the breakdown of meetings within a year is characterized by the popularity of the autumn months (September, October, November), and also the late spring months (May, June).

- **Frequency of organization**: more than 55% of organizations hold international conferences yearly, 24% in every second year. There are organizations with smaller frequency, but 6% of them organize their conferences more than once a year.

- **Topic of the conferences**: Most of the meetings are organized in medical topics (18.3%), followed by conferences in technological (14.2%) and scientific (13%) issues.

- **Location of the conference**: Since 2005, the favourite conference locations are conference hotels that host the sessions of more than 41.5% of events. Also, conference centres are favoured, but the number of events organized here is decreasing year by year. The number of conferences organized at university venues has been steadily decreasing in the past years, 19.2% of events was organized this way in 2008.

- **Destination**: based on the number of sessions organized, most of the conferences were hosted by the United States and Germany. Among the cities Vienna and Paris are ranking first. Besides the number of meetings, also the ranking based on the number of participants is worth analysing.

- **Average registration fee of international conferences**: this sum was USD 547 in 2008. This was the highest value in the period since 1999. The average sum spent by a participant was USD 2487 per event.

- In 2008 conference tourism received its highest revenue based on the statistical data by having 12 billion dollars of revenue.

The Hungarian Congress Office collects the data on conferences organized in Hungary. The office prepares the statistics and evaluation of conference tourism yearly.

### 4.4. Exhibitions

Exhibition is an event at a given place and time, usually organized repeatedly, where large number of exhibitors introduce the supply of one or more branches, or, to support selling, offer information about it to retailers, big costumers and end users.

The definitions of fair and exhibition are often used as synonyms, mixed up, and their meaning is intervened (Table 5).

**Table 5  Differences between fair and exhibitions**

<table>
<thead>
<tr>
<th></th>
<th>Trade exhibition</th>
<th>Consumer market</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Participants</strong></td>
<td>Potential buyers Trade representatives General audience</td>
<td>General audience</td>
</tr>
<tr>
<td><strong>Topic</strong></td>
<td>Branch specialization Even sub-segments at international exhibitions</td>
<td>Topic varies on a large scale: leisure, games, fashion, electronics, presents etc.</td>
</tr>
<tr>
<td><strong>Size</strong></td>
<td>Restricted in number Purchasing intention is more important than number of participants</td>
<td>Large number of visitors</td>
</tr>
<tr>
<td><strong>Opening hours</strong></td>
<td>3–4 days, 5 days in case of larger international exhibitions</td>
<td>Larger fairs 6-10 days, local events 2-3 days</td>
</tr>
<tr>
<td><strong>Size of potential market</strong></td>
<td>International exhibitions: 5-10%</td>
<td>Regional or local visitors</td>
</tr>
<tr>
<td></td>
<td>international visitor Regional, local visitors</td>
<td>Not typical</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Related event</td>
<td>Simultaneously with the exhibition conference, presentations related to the topic</td>
<td>The product is present also physically, it can be purchased</td>
</tr>
<tr>
<td>Product</td>
<td>Representative offer</td>
<td>All year long, except peak seasons of tourism</td>
</tr>
<tr>
<td>Seasonality</td>
<td>April, June, September, October</td>
<td></td>
</tr>
</tbody>
</table>

Source: based on Lawson, 2000 constructed by: Happ, 2010

**Categorization opportunity:**

Based on the size of targeted market:
- Local: its target area is the same regarding exhibitors and visitors, it is not too big regarding geographical agglomeration
- National: its target area covers the whole country
- International: it attracts people from a continent or from all around the world

Based on topic:
- General topic: the circle of exhibited products is not restricted, varied products and services offered for a general audience (e.g. Budapest International Fair)
- Specialized exhibition: pre-determined products, professional visitors (e.g. Travel Exhibition)

Based on location and duration:
- Permanent or long lasting exhibitions (e.g. in visitor centres)
- Temporary exhibitions in dedicated locations (exhibition centres)
- Temporary exhibitions in locations built for other purposes (leisure centre, culture centre, agricultural exhibitions)

**Purpose of the exhibitions:**
- To attract attention: to awake interest of visitors towards the product and service
- Information: interpretation and information to the potential clients about the product, service
- Incentive: to influence the visitor to buy the product or service

**Peculiarities of the exhibitions:**
- concentrated appearance of demand and supply
- presentation and demonstration opportunity
- effective tool of marketing communication and promotion
- reflects the state of the economy
- informal environment
- it provides opportunity to access important target groups

**Demand side:**
- exhibitors: enterprises that rent a place in the exhibition area. Their expenses: rental fees, building a counter, decoration costs, expenses of supplementary events, operational costs of the counter, other expenses (e.g. marketing)
- exhibition visitors: general audience and professional visitors. Their number is decisive regarding the success of the exhibition

- exhibition organizers: the exhibition can be organized by the hosting venue, an independent professional exhibition organizer company or an organization, association of the given branch

Supply elements:

- exhibition places: ensures the venue and technical conditions of the exhibition: building with appropriate size and quality, security service, insurance, waste collection, meeting sanitary requirements, catering opportunities

- technical providers: counter design and construction, furniture rental, flowers, decoration, electrician – the expenses are charged to the exhibitors, the organizer of the exhibition or the exhibitor himself is responsible for the relations to service providers

- other service providers: advertisement agency, traffic, accommodation, catering etc. Based on the official statistics of the UFI, 2,195 trade fairs and exhibitions were organized in (20 countries of) Europe in 2008. The exhibitions attracted in total 655,964 exhibitors and 53.8 million visitors. The exhibitors introduced their products and services on 25.6 million m2. 42% of exhibitions targeted professional visitors, 38% to the general audience, and 20% was opened for the visitors of both segments.

Based on the estimation of the UFI, 53 million m2 of exhibition space is sold in Europe every year, thus only about half of the European trade markets appear in the official statistics. Based on the official statistics, most of the exhibitions are organized in France (615), followed by Spain (341) and Germany (291). Hungary ranks on the 13th (29th) place of the (unofficial) European list.

The average size of exhibition areas is 14,900 m2, the average duration is 3-9 days. It is usually a regularly organized event, annual, biannual or less frequent (in every 3-4 years).

The location can be the same or always different cities can host it in rotation. The largest and highest developed exhibition areas are in Europe, in the United States, in South-East-Asia and Australia.

5. Conditions of the market functioning

All around the world, but especially in developed countries, the socio-economic role of services increased. MICE tourism is one of the largest breakthroughs of the 20th century, it is in permanent change due to the effect of the social, natural, economic, political and cultural environment, and it is in harmony with the elements of demand and supply.

Table 6 Interactions of MICE tourism and its environment

<table>
<thead>
<tr>
<th>Environmental condition</th>
<th>Interaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Socio-cultural environment</td>
<td>- enhances the establishment of connections between the individuals, groups and organizations of society - strengthens the mutual understanding of people from different countries and cultures - creates opportunity to discover the cultural values and traditions of places - standard of living of local residents is an important attraction of tourism supply - provides an incentive to the local residents to increase their professional qualification and to learn foreign languages</td>
</tr>
<tr>
<td>Natural environment</td>
<td>- tourism investments may destroy natural environment: immediate solution of the problems related to water and waste management is necessary - a well designed reception base that merges into the environment and is close to nature is a favoured destination of “off-site” tourism - more and more tourism investments strive to meet the principles of sustainability and enhance “green-consciousness”</td>
</tr>
<tr>
<td>Economic environment</td>
<td>- it creates job in tourism: for organizers of events, travels and conferences, for hotel, catering and transport professionals, and for travel guides - taxes paid also increase the improvement of the conditions of MICE tourism - it</td>
</tr>
</tbody>
</table>
has a market extending effect: its additional effect is realized mainly in the receiving location - multifunctional centres established in country locations support the enhancement of local product market - improves economic structure: MICE tourism is the fastest developing branch of tourism industry - multiplier and synergy effect

<table>
<thead>
<tr>
<th>Political environment</th>
<th>- political in-/stability of the country strongly influences the state of MICE tourism - it is an image-shaping factor - multinational companies located into developing countries often get into conflict with the local social-economic background</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technological environment</td>
<td>- electronic information means enable fast and direct exchange of information - interactive websites, home pages support fast navigation - electronic tourism supply results in cost saving for buyer and seller as well</td>
</tr>
</tbody>
</table>

Source: based on Tasnádi, 2002 constructed and complemented by: Husz, 2010

By designing tourism, the long-run interferences of tourism and its environment must be considered; the developed technical environment must support the ecological interest of mankind.

By investigating the market of the MICE tourism, also the actual political factors and the strategic guidelines of national tourism development plans must be considered. The main objective of the *Hungarian Tourism Development Strategy (2005–2013)* is to improve the standard of living through tourism that is described by value centrisms.

The strategy first analyses the Hungarian situation and then highlights congress tourism as the third national priority of product development.

“Hungary achieved an excellent position in the field of congress tourism, considering the results of scientific life, there is a high interest in Hungary in almost all specialized fields, but especially in medical sciences. Based on the data of the two largest congress world organizations (UIA, ICCA), Hungary and especially Budapest has an eminent position on the top-list of congress destinations.”

Table 7: National priorities of tourism product development (the most important first)

| 1. Health tourism |  |
| 2. Heritage tourism |  |
| 3. Congress tourism |  |


In the case of congress tourism, the aim is to improve the attractiveness of Hungary as a conference tourism destination and to increase the number of international events held in Hungary, to strengthen the position of Hungary on the international congress market even among the increasingly strengthening competitors.

To achieve this,

- Budapest must be enabled to host events with several thousands of participants;
- organized, state supported lobby activity must be carried out to win international congresses;
- congress venues of the capital city and countryside destinations must be successfully marketed on the international market.

Also the *marketing plan 2010* of the *Hungarian Tourism Inc.* deals with MICE tourism. It sets as a main task to help its new partners, the locations that meet international capacity standards, and also the conference centres in the countryside, to enter the market. The Hungarian Congress Office organizes several projects in Hungary to increase the popularity of domestic service providers. The target groups of these actions are partly the MICE tourism professionals, partly the domestic large and medium sized companies.

**6. The effects of MICE tourism, synergy effect**
6.1. The effects of MICE tourism

MICE tourism plays a partial role in the shaping of many other national economy branches (transport, communications, trade, financial services, health-, culture- and sport related services), while it only indirectly demands products and services of other sectors (agriculture, industry, construction industry, and environmental protection).

Participants of MICE tourism are leading representatives of their field of profession, thus MICE tourism also enhances the development of local science and the establishment of professional relations. The opinion forming effect of the participants is significant, and the message mediated by the competent members of different professional groups, scientific and business networks plays a significant role in creating positive country image. MICE tourism is suitable for extending peak season and it also has a considerable tax-generator and job-creator effect. The spending of a foreign MICE tourist in Hungary is twice as much as that of a leisure tourist. Also CSR (Corporate Social Responsibility) is increasingly seen by the organization of conference programmes, the essence of which is that the participants and the organization mark the location and support the local society. Based on research results, following a business trip, 40% of the participants return to the destination as leisure tourists.

6.2. Cooperation with other tourism products

The services of MICE tourism are based on leisure services, and they are complemented with the special service demand of the different MICE types. In addition to these, MICE tourism gets in connection with different tourism products as well.

Health tourism

Throughout the years, the approximation of MICE tourism – mainly conference tourism – and health tourism can be observed on the international market. High category hotels realized that the demand of business guests and that of conference participants for health conservation and relaxation after official programmes was increasing. Just a few years ago, the presence of wellness services meant a competitive advantage, but today these services are regarded as basic criteria. Wellness cures can appropriately complement official programmes; the demand for prevention is strongly realized in tourism segments which can also be seen as target groups of conference tourism. Thermal water reserves, bathing culture and high quality wellness services of Hungary can be unique complements of different conferences, congresses.

Cultural tourism, city tourism, sport tourism, wine- and gastronomy tourism

All segments of MICE tourism are related to these types of tourism as facultative programme opportunities. Leisure programmes before (pre), during and after (post) the event support the relaxation of the participants. Spending leisure time can be a cultural programme, as can be sightseeing, active or passive sport programme, wine tasting etc. The programme of incentive tourism is also related to these tourism segments.

Holiday tourism

A product cooperating mainly with the incentive tourism, the destination of the travel can be a resort place.

Shopping tourism

Besides buying souvenirs, shopping of products related to the given profession or topic appears in the case of MICE tourism, and prestige shopping has bigger importance.

7. Factors influencing the development of MICE tourism, practice and trends of development

By investigating the trends of MICE tourism, we can argue that there was a drastic drop on the market of MICE trips in 2009 due to the reduction of travel related expenditures of companies. It is typical that they merge more, shorter trips, and, instead of luxury services they put the emphasis on good service. Due to the saving measures of business enterprises and the decrease in the discretionary incomes of consumers, the importance of price-quality ratio is even larger, and the importance of personally customized products and that of flexibility continues to increase.
By investigating the expected development tendencies of the MICE segment in the following 5 years, we can get an answer to the question which factors will exert the largest effect on the evolution of the market. The demand for unusual locations is increasing recently, and not only exotic, distant places belong here but also less well-known regions and cities of known places. Every location can make a profit from the market increase that can break out from the common programme supply and offers unique, novel experiences and programmes for the participants in the event and the accompanying persons. As a kind of reply to globalization, the philanthropic, hospitable and regarding local culture authentic locations and environment become especially important against the multitude of impersonal, uniform standards and services.

In 2009 the following trends can be observed in the international outlook of MICE:

- The demand for corporate meetings in 2010 already exceeds the results of last year and is permanently increasing. The solid conference organizer relation network is appreciated. The number of reservations in 2011 is spectacularly increasing.

- The reservations do not come long before the timing of the conferences (app. 30-45 days). The reservation and realization usually happen in the same given month. The organizers are reluctant to commit themselves for a longer reservation period, jeopardizing so the possible cancellation of the event, and the payment of penalty.

- Extraordinary price sensibility: the hotels are starting to compete again with especially favourable package pricing for the MICE events. Those conference centres can successfully emerge from the economic world crisis which have stable base, retained the high quality of their services and carefully maintained their partner relations.

- In 2010 the number of participants of professional events decreased and also their stay shortened by a day. The meetings usually had regional or local scope and their topics were more bound. They neglected social functions and working dinners to cut expenditures.

- By today, environmental responsibility and “green programmes” are generally expected, but in some corporate segments, e.g. in case of state and educational companies this is a basic requirement.

- Conferences less typically offer team building and complementary programmes. Due to tight budgets, there is no room for unnecessary expenses during conference organization; the emphasis is laid on basic attendance.

- Maximal broadband internet connection is a basic requirement against conference organizers. Business partners arrive to meetings and conferences with the expectation of full equipments to present online contents.

- Due to the crisis of the previous years, organizers hope that service providers offer significant allowances. Complex conference packages are valued again.

- Healthy and protein-rich diet contributes to maintain the attention of participants. An important task of organizers is to care about menus and buffet tables. Also wellness centres of hotels play an emphasized role in the assurance of healthy living.

- Community media is gaining on importance, but personal contacting is decisive in the case of business meetings. However, LinkedIn and Trip Advisor are increasingly important for conference organizers, since there are information and consumer opinions available on the destinations. In addition, more and more organizers use Facebook and add representatives of service providers to their friends to establish new connections in favour of strengthening their business relations.

The following trends of Hungarian MICE tourism can be observed:

- the cooperation among places and accommodation providers in Budapest is increasing

- the Hungarian Congress Office (HCO) presents itself on the two most important European fairs, on IMEX and EIBTM, and also publishes the following, English and German editions of the Meeting Planner’s Guide to Hungary

- the Business Travel Show will be organized in October

- the HCB devotes a special attention to its Conference Ambassador Programme that aims to bring meetings of international organizations to Hungary
- the HCB strives to introduce its new partners (for example SYMA, OPUS 2010, New York Palace Event Centre, Expo Congress Hotel, Hilton Visegrád, Gotth’Art Hotel, Mária Valéria Hotel etc.) on the market with the available marketing tools (internet and media presence, press materials, exhibitions, outward promotions etc.)

- a common, internet based marketing system will be introduced, where conference participants can book their accommodation at a pre-determined price

“Green Event” Strategy (2001) must be mentioned among the factors influencing development that was established and accepted on the Annual Congress and Exhibition of the National Reuse Coalition (USA), and revised in 2007. Some useful pieces of advice:

- usage of recycled and/or environmentally friendly paper and office tools

- two-sided printing, reuse of papers

- in food processing, using raw materials that are seasonal and produced in local farms

- using only large packaging beverages, cream etc. on events

- usage of biodegradable and recycled personal hygiene products and environmentally friendly cleaning materials

- selective waste collection

- increasing the air quality of offices and shared offices with green plants

- centrally set energy consumption principles (lighting, temperature, ventilation, shading etc.)

8. Peculiarities and difficulties of research, recommended data bases

Two problems must be mentioned related to MICE tourism research:

- we can rely primarily on literature in English,

- lack of update, reliable statistics; there are no precisely defined technical terms, it varies by countries and cultures who comprehends what as MICE tourism.

Official statistics: the most important data on conference and MICE tourism can be found among the statistics of the Hungarian Central Statistical Office. Main characteristics of MICE tourism can be found also in the annual publications of the HCSO. MICE tourism related figures contain data collected on the participants of congresses, business trips, exhibitions and fairs. The Hungarian Tourism Inc. and the Hungarian Congress Bureau publish every year a summary report and statistical tables on the state of MICE tourism. These reports are on the international events organized in Hungary, respectively on conference and business tourism.

In addition to the Hungarian data, also the database of UNWTO contains reports on MICE statistics. The last edition containing the summary data of MICE tourism 2000 was published in 2003.

Other statistical data: data on business tourism motivated travels organized by travel agencies and PCOs are available at the enterprises. Also surveys of pollster companies can be listed here, usually these are ordered by the Hungarian Tourism Inc. and most of the data are also published.

Researches are also supported by scientific publications published several times a year.

MICE tourism related scientific research started in the middle of the 1980s. At the beginning, publications appeared in three countries (United States, United Kingdom and Australia) which represented developed MICE destinations of the market. Recently, the research both on the demand (consumer behaviour analysis, motivation research, consumer decision) and supply side (criteria and decision phases of the selection of receiving areas, marking, destination marketing, the role of DNOs) have become significant.
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Magyar Kongresszusi Iroda hivatásturisztikai marketingterve (MICE tourism marketing plan of the Hungarian Congress Bureau)

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Tasks of the PCO feladatai (Tasks of the A PCO)Úszó resortok a MICE-piacon (Swimming resorts of the MICE market)