

Trends in tourism supply and demand in the districts of the Southern Great Plain region

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Abstract

According to the Statistical Office of the European Union (EUROSTAT), the Southern Great Plain region was one of the poorest regions in the European Union in 2022, and tourism development could be one of the breakthrough points. The Southern Great Plain region has a special role for spas and related health tourism, and its rich historical heritage provides a good basis for cultural tourism. The main purpose of the research was to examine the tourism situation in the districts of the Southern Great Plain region, using a complex tourism performance indicator and cluster analysis. Based on the results of the complex tourism performance indicator, the Gyula district performed the best in the region. The results of the indicator show that tourism is not only concentrated in the tourist areas defined by the government in the region. These district are thus excluded from the target areas for tourism investment. In the future, it would be important to examine the situation of areas that are not included in the defined tourism areas and to integrate them into the tourism target areas, since tourism is a means of balanced development of the areas and can contribute to the convergence of disadvantaged areas.

Keywords: Hungary, Southern Great Plain region, tourism, complex tourism performance indicator, cluster analysis

JEL: R11, R19

Introduction

Despite the fact that the importance of tourism for regional development and growth has been recognised by scientists and policy makers for decades, tourism only emerged as a significant and distinctive development area in the early 1990s (Calero & Turner, 2019). However, there is also debate about whether tourism is a tool for the balanced development of territories or, on the contrary, a determinant of regional disparities (Andraz et al., 2015; Tosun et al., 2003). Therefore, it is essential to understand how tourism develops in place and over time in order to maximise the benefits of tourism in a given area (Chean et al., 2019). The presence of regional ties is an important characteristic of tourism, but the presence of localism is also a very important factor, as the vast majority of tourist attractions are based on the resources of a particular place, region or natural landscape (Aubert et al., 2007; Michalkó, 2012). Just as in the case of international tourism, newer and newer areas are being integrated into domestic tourism (Csapó & Törőcsik, 2018).

Over the past few decades, tourism has become one of the major drivers of economic growth in many developing and developed countries (Alam & Reddy, 2016). The European Commission (2010) has also recognised the impact of tourism on economic growth, highlighting its potential and its important role in social inclusion, especially in rural, mountain and peripheral areas. Tourism contributes to economic growth in various ways, including foreign exchange earnings, attracts international investment, increases tax revenues and creates additional employment opportunities

(Alam & Reddy, 2016). Nowadays, tourism is also considered a key economic sector in Hungary (Berkes & Happ, 2020), as in 2022 tourism contributed 6.0% directly to GDP and tourism-related sectors accounted for one tenth of domestic employment (KSH, 2022). Tourism also plays a major role in the socio-economic life of our country and its international image (Papp-Váry, 2019). When looking at the economic impact of tourism, we can highlight its multiplier effect, as its positive economic effects can be felt in other sectors of the economy, and it has a job-creation and regional rebalancing effect. Tourism can play a levelling role in regional development disparities, with an impact across destinations, regions and counties. Tourism can also be seen as a breakthrough point in economic differentiation processes (Berkes & Happ, 2020). Tourism is often seen as an effective means of alleviating poverty and improving the socio-economic conditions of poor rural communities (Zhang, 2021). According to the EUROSAT 2022 data, the region of Southern Great Plain (Figure 1.) is the 22nd poorest region in terms of GDP per capita out of 242 regions in the European Union. Tourism could be one of the region's break-out points, as it is rich in natural and cultural assets. It is the largest region in Hungary, covering one fifth of the country, and has a wide variety of natural features that favour agriculture, which produces several unique Hungarian products. These include paprika from Kalocsa and Szeged, onions from Makó, apricot brandy from Kecskemét and wheat from Bánkút. Three national parks are located in the region, including parts of the Kiskunság, Körös-Maros and Duna-Dráva National Parks. In the case of the Southern Great Plain, it is important to highlight the thermal waters and medicinal waters and the tourism based on them. In the case of thermal and spa waters, important cities include Gyula, Orosháza, Szeged, Szentes, Makó and Kiskunmajsza (Iványi, 2001). Two of the 11 tourism areas in Hungary are located in the region, Gyula and its region and Szeged and its region. The two tourist regions are the districts of Békéscsaba, Gyula, Hódmezővásárhely, Makó, Mezőkovácsháza, Mórahalom, Kistelek and Szeged.



Figure 1: Location and counties of the statistical region Southern Great Plain

Source: KSH, 2019

Methodology of research

The main objective of the research was to examine the tourism situation in the districts of the Southern Great Plain region. A complex tourism performance indicator has been applied in the Southern Great Plain region in order to analyse and compare tourism supply and demand factors by district. The data for the complex tourism performance indicator were obtained from the national statistical databases (Central Statistical Office and the National Spatial Development and Planning Information System). In total, there are 27 districts in the Southern Great Plain region. Out of the 27 districts, 23 district could be analysed, because for 4 districts data was not available for all indicators due to data protection reasons. The study period was 2021. The indicators for the complex tourism performance indicator (Table 1.) were compiled on the basis of a study by Berkes & Happ (2021). Due to lack of data, the average length of stay of guests was used instead of the number of nights per guest, while the share of trade and catering employees in total employment was replaced by the share of accommodation and food services in total active enterprises. A fifth indicator has been added to the complex tourism performance indicator to measure the tourism tax receipts per inhabitant of local governments. The fifth indicator contributes to a more precise definition of tourism demand in the districts surveyed.

Table 1: Indicators of the complex tourism performance indicator

<i>Berkes& Happ (2021)</i>	<i>Own data based on Berkes- Happ (2021)</i>
Capacity utilisation - total number of nights spent in other (formerly private) accommodation establishments for commercial and business purposes / total number of bed places, %, Source: KSH TA	Capacity occupancy rate, %, Source: KSH TA
Gross price of accommodation per night, HUF, Source: KSH TA	Gross price of accommodation per night, HUF, Source: KSH TA
Number of nights per guest, Source: KSH TA	Average length of stay of guests, night, Source: KSH TA
Trade and hospitality employees as % of total employment, Source: MÁK	Accommodation and food service activities as % of total active enterprises, Source: KSH TA
	Tourist tax revenue of local governments, per inhabitant, HUF 1000, Source: TEIR

Source: Own data

Step 1: Transforming the basic indicators into a scale of the same scope using a normalization process based on the following formula:

$$fa_i = \frac{1}{n} \sum_{j=1}^n fa_{i,j,norm}$$

$fa_{i,j,norm}$: normalized base indicator

$fa_{i,j}$: basic indicator

$\min(fa_{i,j})$: the minimum value of the basic indicator

$\max(fa_{i,j})$: The maximum value of the basic indicator

Step 2: Calculate group indicators: the average value of the basic indicators within a group gives the value of the group indicator of that group based on the following formula:

$$fa_i = \frac{1}{n} \sum_{j=1}^n fa_{i,j,norm}$$

fa_i = group indicator

fa_{i,j,norm}: normalized base indicator

n: number of indicators in a group

Step 3: Calculation of a complex indicator: the average value of the five group indicators gives the value of the developmental complex indicator based on the following formula:

$$fi = \frac{1}{m} \sum_{i=1}^m fa_i$$

fa_i: group indicator

fi: complex indicator

m: number of group indicators

A further method of analysis used was cluster analysis. Cluster analysis makes it possible to group districts according to the results of the complex tourism performance indicator and to compare the resulting territorial units with the tourism areas designated by the government. The objective of cluster analysis is to categorise n number of items into k number of groups (k>1), which are called clusters, using p (p>0) variables. As with other types of statistics, cluster analysis has several variants, each with its own set of operations. In the selected procedure, the clusters are predefined. This is known as the "K-based clustering procedure". Cluster analysis was used to categorise the districts of the Southern Great Plain region based on the results of the complex development index.

Results

Capacity occupancy rate is the development of the match between supply and demand in a defined area. In 2021, the districts of Mórahalom and Gyula performed exceptionally well in terms of capacity utilisation in the South Great Plain region (Figure 2.). Mórahalom, the centre of the Mórahalom district, has recognised the benefits of health tourism and has used its thermal water resources and the support it has received to this effect in line with the opportunities. The municipality has played a major role in the development of tourism in the town and has invested a lot in the development of the spa. These investments have brought many changes to the daily life of the municipality and have made Mórahalom a successful health tourism destination, as the development of tourism has been accompanied by the development of the whole town (Martyin, 2015). The Gyula Castle Spa in Gyula is the only internationally ranked spa in the Southern Great Plain region, according to the National Health Tourism Development Strategy. The local authorities are not obliged to take on tourism tasks, but Gyula has an active role in this area (Varga, 2015).

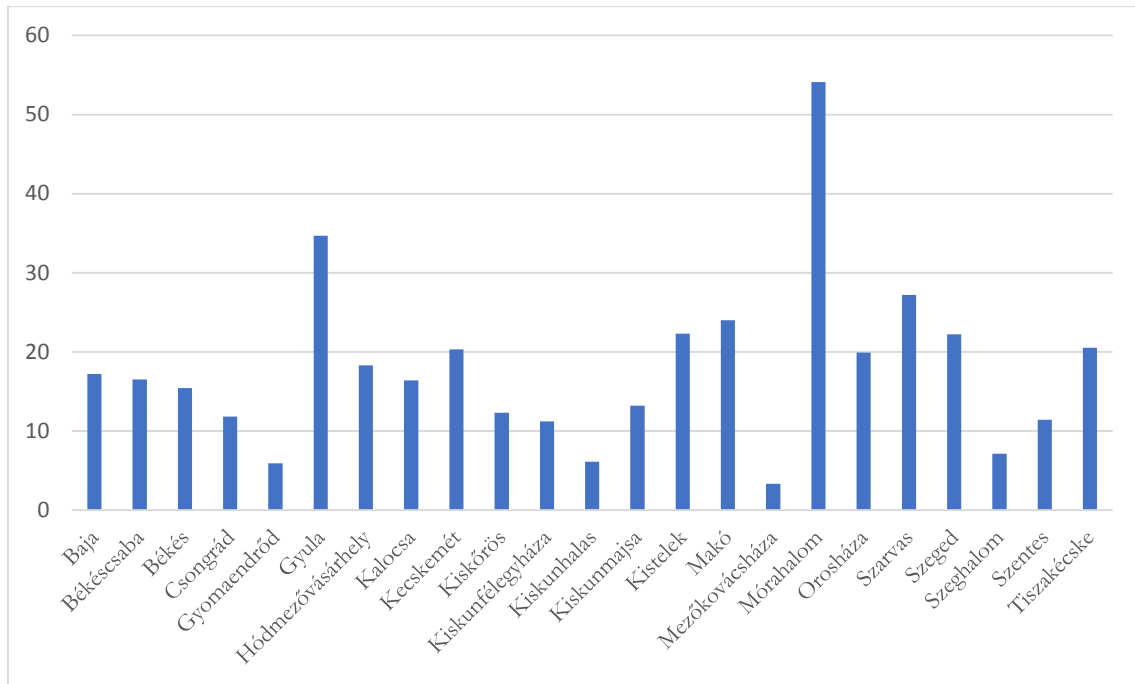


Figure 2: Capacity occupancy rate in the districts of the Southern Great Plain Region (%), 2021

Source: based on KSH (2022) data, own editing, 2024

Capacity occupancy rate is closely related to demand-side factors such as seasonality and average length of stay. The evolution of the indicator is also influenced by supply-side factors such as the gross accommodation price per night.

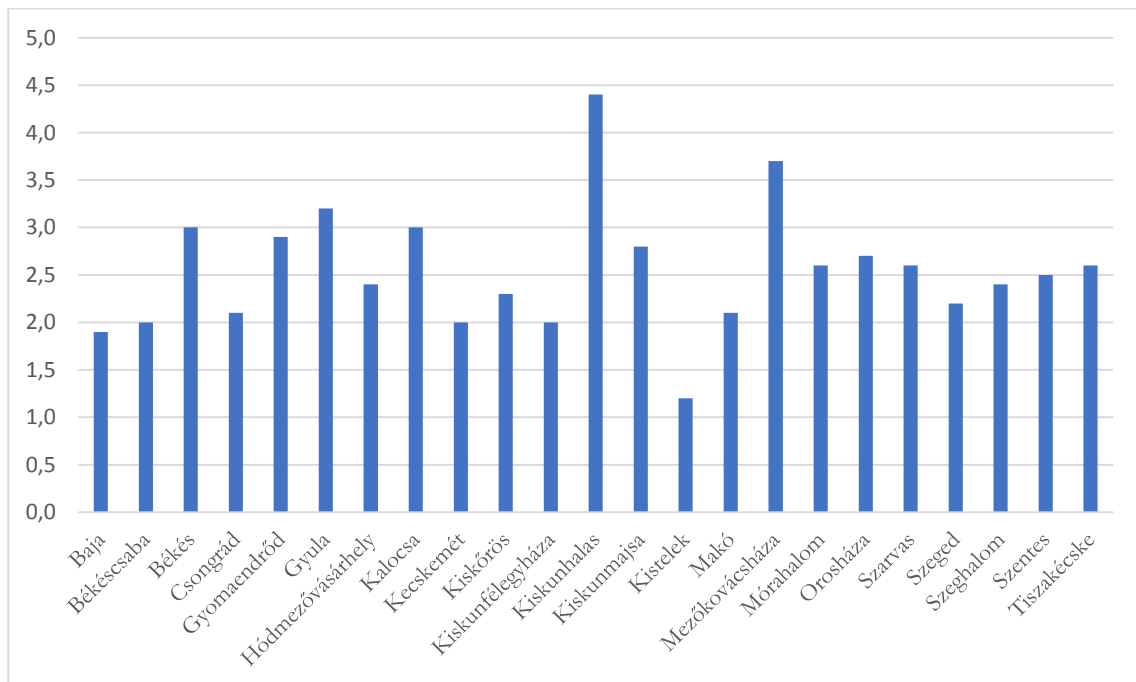


Figure 3: Average nights spent by tourists in the districts of the Southern Great Plain region (in number), 2021

Source: based on KSH (2022) data, own editing, 2024

In the districts of the Southern Great Plain region, the average length of stay of guests in 2021 was the highest in Kiskunhalas district, more than four nights (Figure 3.). Kiskunhalas district is located in Bács-Kiskun County, which is the largest and one of the sunniest counties in Hungary. The region is attracting a large number of visitors to waterfront resorts such as Kunfehértó in Kiskunhalas district. Among the attractions of the County is the Kiskunhalas Lace, which has become famous not only nationally but also internationally. In addition to Kiskunmajsa, the spa of Kiskunhalas offers a unique experience and healing for those interested in health tourism [1]. The district of Mezőkovácsháza is also prominent thanks to its thermal baths and Mezőhegyes, where equestrian tourism is outstanding, as the National Stud and Farm Plc. (Nemzeti Ménesbirtok és Tangazdaság Zrt.).

Overall, the length of stay is high in the districts (Kiskunhalas, Mezőkovácsháza, Gyula, Békés) where there are thermal and spa baths. Nowadays, the spa culture is experiencing a renaissance. Health awareness has become a real trend. Consumers are visiting health centres, wellness and spa hotels for health maintenance and recreation purposes, as the aim is no longer just to recover (Végi, 2021). Travel for health maintenance and recovery is not seasonal and is relatively long (1-2 weeks).

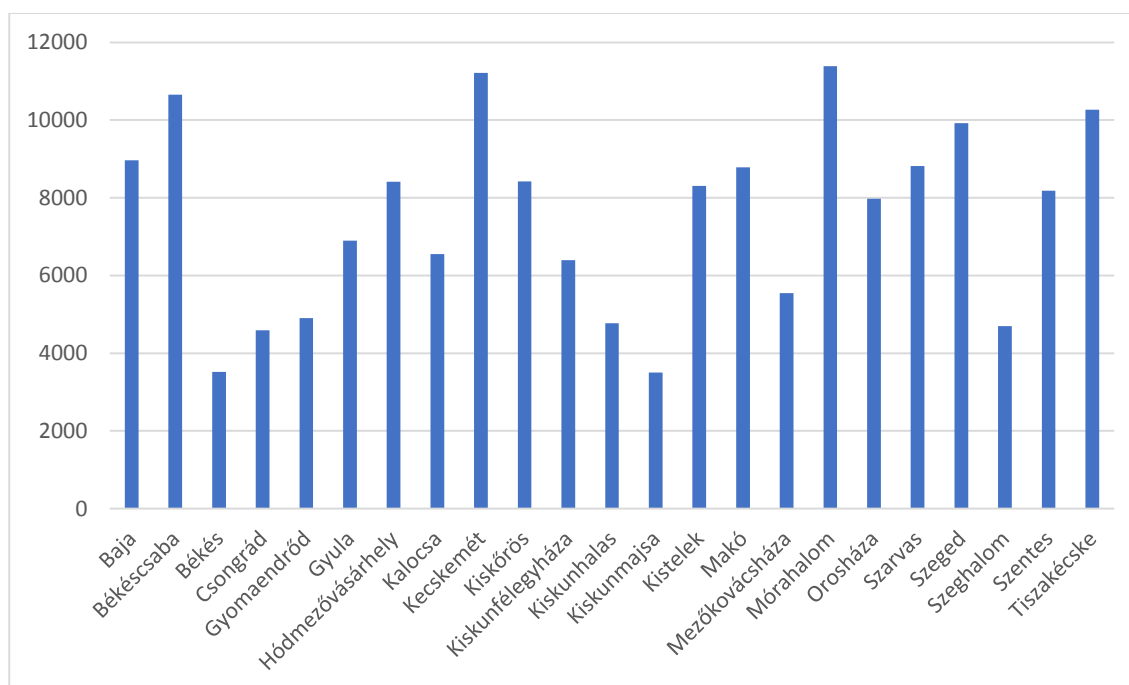


Figure 4: Gross accommodation price per night in the districts of the Southern Great Plain region (HUF/person), 2021

Source: based on KSH (2022) data, own editing, 2024

The tourism demand side factor, gross accommodation price per night, was highest in Mórahalom district in 2021 (Figure 4.). Next to Mórahalom, the Kecskemét district was the best performer. In the case of the Kecskemét district, tourism is a rather complex system with several pillars and a varied offer (Gulyás, 2019). Not far behind are the districts of Békéscsaba and Tiszakécske. Békéscsaba is the centre of the Békéscsaba district, the economic centre of the county and the most important settlement of the central Békés district (Békéscsaba, Gyula, Békés). The city's economy is developing dynamically, and the modernisation of the city has been started (Veselicz, 2021). The Hungarikum Liget, a major tourist facility in Tiszakécske district, offers cultural and sporting events throughout the year. The district is also in an excellent position in

terms of transport, as it is located in the middle of the country, and its proximity to the motorway is also a key factor in the development of the region. Overall, the gross accommodation price per night is higher in more densely populated, economically stronger areas with good infrastructure.

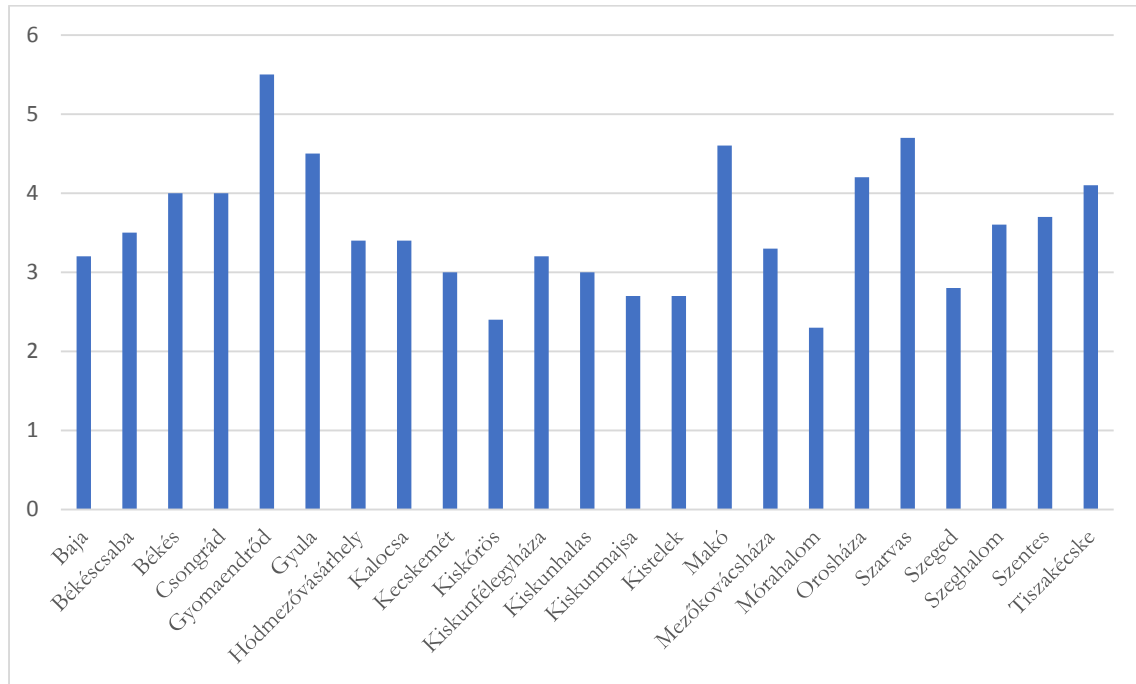


Figure 5: Accommodation and food service activities as a percentage of total active enterprises (%), 2021

Source: based on KSH (2022) data, own editing, 2024

The share of accommodation and food service activities among all active enterprises was highest in Gyomaendrőd district (Figure 5.). Besides Gyomaendrőd district, it was also high in Szarvasi district, Makó district and Gyulai district. The Gyomaendrőd district is located in the Southern Great Plain region, in Békés county. The district centre is situated in Gyomaendrőd, one of the most disadvantaged areas of the country, where the spa plays a prominent role. Ecotourism and pilgrimage tourism are also becoming increasingly popular in the town (Juhász, 2014).

In tourist areas, tourism tax is mainly introduced, but it is important to note that it is not charged to local residents, but to tourists/consumers arriving in the municipality (Darabos, 2016). However, the importance of tourism tax should not be neglected, as there are municipalities where it is one of the main sources of revenue and therefore a major part of the budget of the municipality (Gróf, 2020).

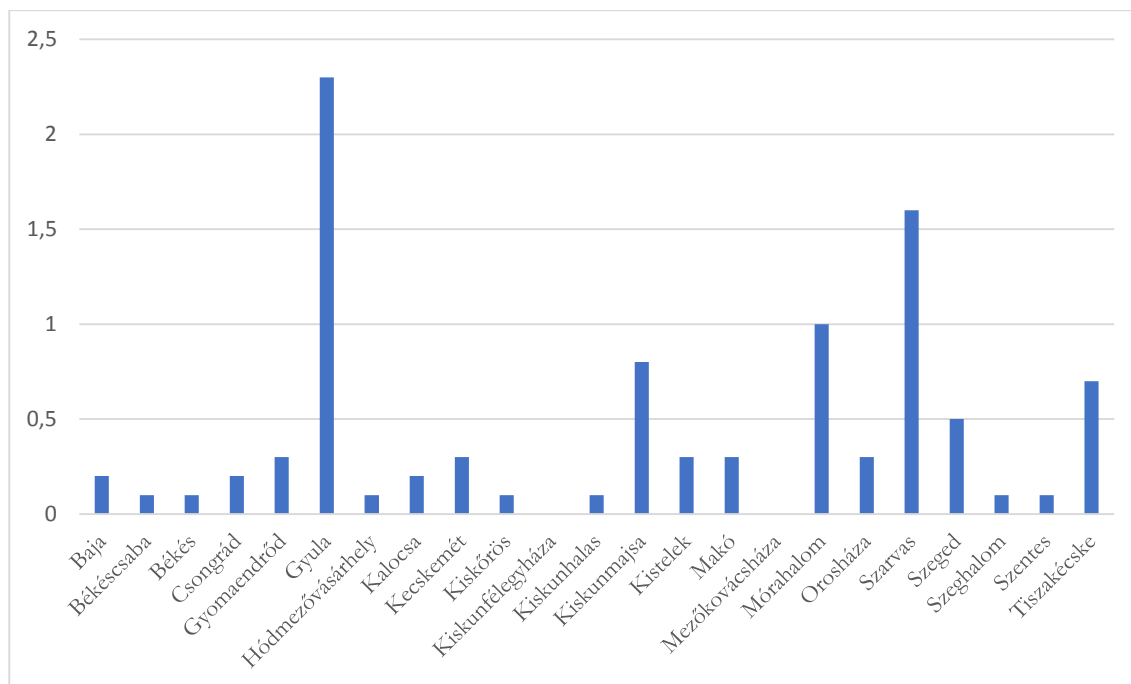


Figure 6: Tourism tax revenue per capita of local governments (HUF 1000), 2021

Source: based on TEIR (2021) data, own editing, 2024

The tourism tax revenue of local governments was particularly high in 2021 in the Gyula district (Figure 6.), where tourism is the dominant sector (Varga, 2015). The Szarvas Arboretum, the Szarvas Holt-Körös, the Szarvas Water Theatre, are all concepts that are known throughout the country. The list is not complete, but it shows that the city has excellent potential for tourism. In addition to the centre, the district includes Békésszentandrás, Csabacsúd, Kardos, Kondoros and Örménykút. The town is also the real centre of the region (Jancsó, 2014.) The local TDM organisation, the "Körös-menti Turisztikai és Kulturális Egyesület" which has been operating since 2011, plays a major role in the tourism development of Szarvas and its region.

Following the calculation of the complex tourism performance indicator, a ranking was established among the districts of the Southern Great Plain region (Table 3). In the ranking, the Gyula district performed outstandingly. The tourism sector in the centre of Gyula district is very important. Gyula has a number of attractions, such as the Gyula Castle Baths, the only internationally renowned spa in the South Great Plain region, and Hungary's only intact brick castle. The success of the region is due to the municipality's involvement in tourism and the fact that it is also important to monitor and follow tourism trends in the destination (Varga, 2015).

Table 3.: Ranking of the districts of the Southern Great Plain region according to the tourism performance indicator

Position in the ranking	District name	Complex Tourism Performance Indicator
1.	Gyula	0.672
2.	Szarvas	0.605
3.	Mórahalom	0.574
4.	Tiszaújváros	0.500
5.	Makó	0.441
6.	Orosháza	0.417
7.	Kecskemét	0.382
8.	Gyomaendrőd	0.378
9.	Szeged	0.374
10.	Békéscsaba	0.367
11.	Hódmezővásárhely	0.336
12.	Szentes	0.328
13.	Kalocsa	0.327
14.	Baja	0.317
15.	Kiskunhalas	0.296
16.	Békés	0.275
17.	Mezőkovácsháza	0.271
18.	Kistelek	0.248
19.	Kiskőrös	0.244
20.	Csongrád	0.241
21.	Kiskunmajsa	0.234
22.	Kiskunfélegyháza	0.211
23.	Szeghalom	0.210

Source: own editing

The districts of the Southern Great Plain region were grouped using cluster analysis based on the results of the tourism performance indicator. K-cluster analysis was used, whereby predefined clusters were formed. Three groups were identified (Figure 7.). The first group, which includes the most developed districts, includes the districts of Gyula, Szarvas and Mórahalom. The second group includes the more moderately developed districts, i.e. Tiszaújváros, Makó, Orosháza, Kecskemét, Gyomaendrőd, Szeged and Békéscsaba. The least developed districts in terms of tourism include the last 13 districts in the ranking (Table 3.).

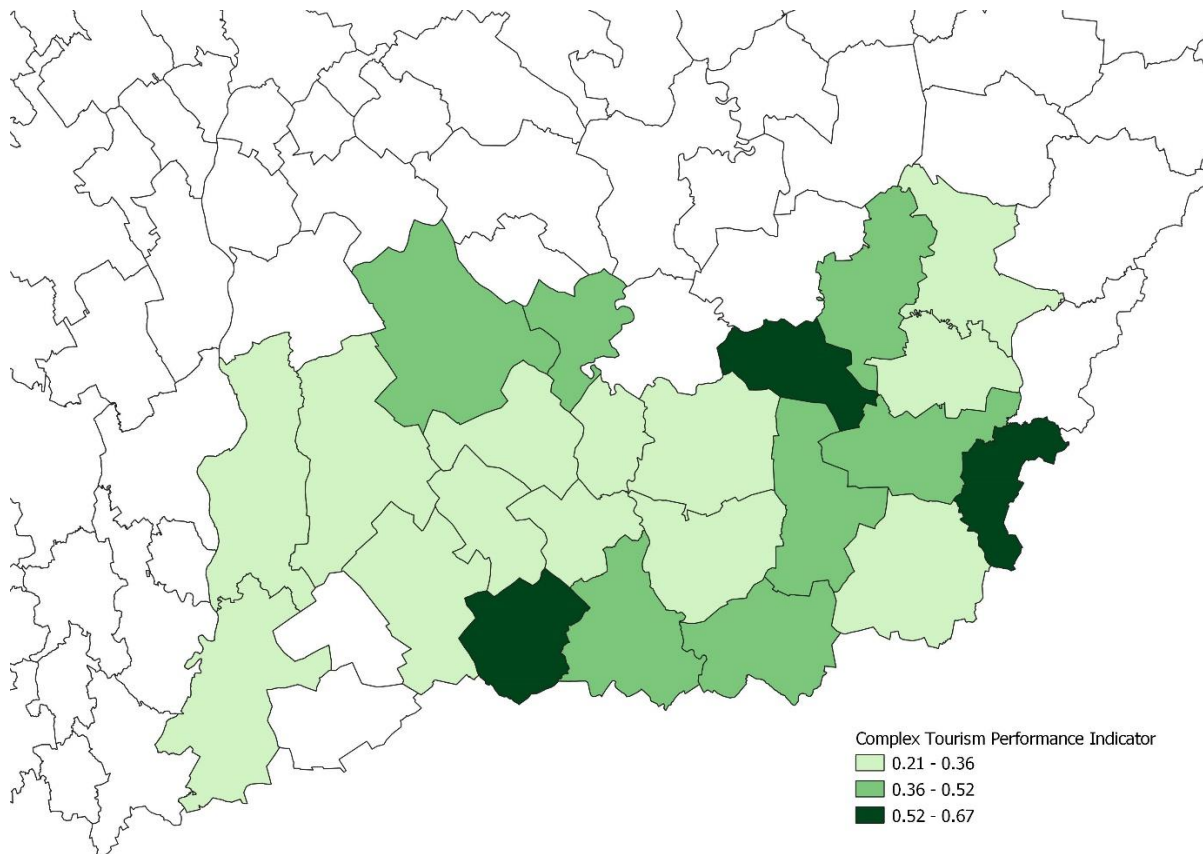


Figure 7.: Clustering of districts in the Southern Great Plain region using cluster analysis

Source: own editing

In terms of tourism areas in Hungary, the Southern Great Plain region includes Szeged and its surroundings, which includes the districts of Hódmezővásárhely, Makó, Mezőkovácsháza, Mórahalom, Kistelek and Szeged. The Mórahalom district is the best ranked district in the Tourist Region of Szeged for the tourism performance indicator. The Mórahalom district is followed by the districts of Makó, Szeged, Hódmezővásárhely and finally Mezőkovácsháza. Only the Mórahalom district of Szeged was ranked among the best performing districts in the cluster analysis. The medium developed category in terms of tourism includes the Szeged and Békéscsaba districts. The Gyula Tourism Area covers the districts of Békéscsaba and Gyula. The Gyula district was the most outstanding in terms of the tourism performance indicator, while the Békéscsaba district was ranked 10th as a middle developed district. On the basis of the tourism performance indicator and the cluster analysis, the most developed district is the district of Szarvas, which does not belong to any of the tourism regions.

As in other sectors of the economy, we can talk about centres and peripheries in relation to tourism, which are determined by the different occurrence of tourism attractions that also generate demand (Végi, 2021). The results of the tourism performance indicator show that tourism in 2021 was not only positive for those districts whose territory is affected by a tourism region (Gyula, Szeged). The territorial data clearly show and demonstrate the territorial inequality of tourism in the Southern Great Plain region. The territorial development of tourism in our country is strongly influenced by the infrastructure and economic and income development. However, there are also financial and institutional barriers to reducing territorial disparities (Tóth, 2005).

Conclusion

The Southern Great Plain statistical region includes 3 counties and 27 districts. It is the largest region in Hungary, covering one fifth of the country's territory. According to the Government Decree 290/2014 (26.XI.), Jánoshalma district is the 6th, Sarkadi district the 12th, Mezőkovácsháza the 18th and Bácsalmás the 24th most disadvantaged district in Hungary, while Szegedi district is one of the most developed regions of Hungary. Within the district there is also a significant spatial inequality. Furthermore, according to EUROSTAT 2022 data, the region is one of the poorest in the European Union, and tourism development could be one of the break-out points. The Southern Great Plain region has a special role for spas and related health tourism, and its rich historical heritage provides a good basis for cultural tourism. At the end of 2020, the Government of Hungary enacted Government Decree 429/2020 (IX. 14.) on the definition of tourist areas, on the basis of which 11 tourist areas were established. Two of the 11 tourist regions are located in the statistical region of Southern Great Plain, Gyula and Szeged. Based on the results of the complex tourism performance indicator, the Gyula district performed the best in the South Great Plain statistical region. The Gyula district was followed by the Szarvas district, which is not linked to any of the tourism regions, as was the Tiszakécske district, which came fourth. It is important to note that tourism in the South Great Plain district is not concentrated only in the defined tourist areas, according to the complex development indicator. However, these districts are excluded from the target areas for tourism investment. In the future, it would be important to examine the situation of areas not belonging to the defined tourist areas and to include them in the tourism target areas, since tourism is a means of balanced development of the areas, which can contribute to the development of disadvantaged areas within the region and can also help to improve the disadvantaged situation of the region in the European Union and in the country.

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