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A STUDY ON THE COMPETITIVENESS FACTORS OF SPAS AND HEALTH RESORTS IN HUNGARY AND NEIGHBOURING CENTRAL EUROPEAN REGIONS*

Abstract

The paper covers two topics which are, broadly, inseparable. The first has as its main target the competitiveness of Spa Tourism in two Regions of Hungary - in settlements with different characteristics; the second, recognising the need for a new way to measure competitiveness in the sector, deals with the creation of a new *competitiveness index*.

The benefits of virtually all forms of Tourism - economic or social – are well enough known to need no repetition. This is especially true of such fields as Spa or Health Tourism, in which there is a natural trend towards longer stays and higher expenditure by visitors. For a relatively poor country such as Hungary – weak in natural resources apart from agricultural land – the basic presence of a generous supply of easily accessible thermal or medicinal water below a huge proportion of its surface area (70%) is a remarkable gift. Nevertheless, many factors are to be studied if a rational, sustainable development policy is to be elaborated by public and private interests.

There are many spas – settlements with thermal or medicinal waters (or both) - spread across Hungary, and their variety is extraordinary. There are huge differences in terms of size, visitor numbers, accommodation facilities, overnights, leisure or treatment facilities and location – that is, their closeness to favourable population areas (domestic or foreign). The critical decisions on investment and development need comprehensive data on all factors of all locations. The essential issue is competitiveness: in Central Europe, where spas have a great tradition and history (e.g., Germany, Austria and today's Czech Republic), does or can Hungary offer a product which will sell? There are numerous factors and as many bases on which to judge.

In 2013 a team from the Faculty of Business and Economics at Pécs University - supported by Hungary's National Scientific Research Foundation (OTKA) – embarked on a study of the competitiveness of spas in the Southwest of the country – an area close to the border with Austria – both an important source of clients and, with its own modern, highly developed spa tourism sector, a serious competitor. The project is scheduled to end in Summer 2016.

A total of 38 spas were examined in Hungary and bordering Burgenland. This was based on a variety of approaches: data obtained from, for example, Hungary's Central Statistical and Tax Offices, individual websites of spas, personal visits and interviews by members of the research team and a telephone survey of customers by a professional market research organisation.

Many factors were used to create a comprehensive set of indicators for what we hope will be accepted as a useful general purpose tool. These ranged from basic concerns such as the type of water in a location and accessibility to size, accommodation quality, facilities and services – together, of course, with cost).

Key terms: *spas, competitiveness index, accessibility, thermal water, medicinal water*

** Based on the results of OTKA project No. 106283 „Survey of the Competitiveness Factors of Spas and Health Resorts in Hungary and Central European Regions”*

INTRODUCTION

Health Tourism in Hungary is a unique product with a unique background in its spas based on an almost unlimited supply of natural thermal and medicinal waters, and these have the capacity for sustainable development and growth. However, although Hungary is only a modestly sized country, there are huge regional disparities within the sector in terms of history, development, competitiveness, client base and even seasonality. The sector has a highly fragmented ownership structure and the consequent differences in commercial and investment philosophy, experience and **expertise** do not generate great confidence for the future, even though its importance to the country is so obvious. There exists highly sophisticated competition in the immediate vicinity, and so constructive comment and criticism can only be of benefit.

We hope to offer an accurate picture of the supply and demand factors in two neighbouring regions of Hungary (West and South Transdanubia). The regions are at different levels of development in competitiveness and in the exploitation of these resources. The reasons for these differences are economic and geographic and so might originate in the quality of supply and in the, affluence of the clientele. We examined four spas in each region, comparing data on guests from the domestic and incoming markets; we explored differences in terms of average stay and income levels and also the role of spa development and various new trends. The spas selected for analysis were: Hévíz, Bük, Zalakaros and Lenti in West Transdanubia and Harkány, Nagyatád, Igal and Tamási in South Transdanubia. We duplicated this procedure in two neighbouring, cross-border regions of Austria (Burgenland) and Slovenia where the spas involved were Bad Sauerbrunn, Lutzmannsburg, Bad Tatzmannsdorf and Stegersbach in Burgenland and Radenci, Moravske Toplice, Terme Lendava and Terme Banovci in Slovenia.

The selection of four spas in each region was made on the basis of their size and the specialised or innovative services offered. In our study we present the Health Tourism characteristics of the four regions, their clientele and the current situation of the spas; the latest Health Tourism trends are also analysed, highlighting the role of environmental factors in choosing a destination.

For the sake of easier comparability the highlighted settlements with spas in each region have been chosen on the basis of residents numbers and the scale of innovative services. (Figure 1).

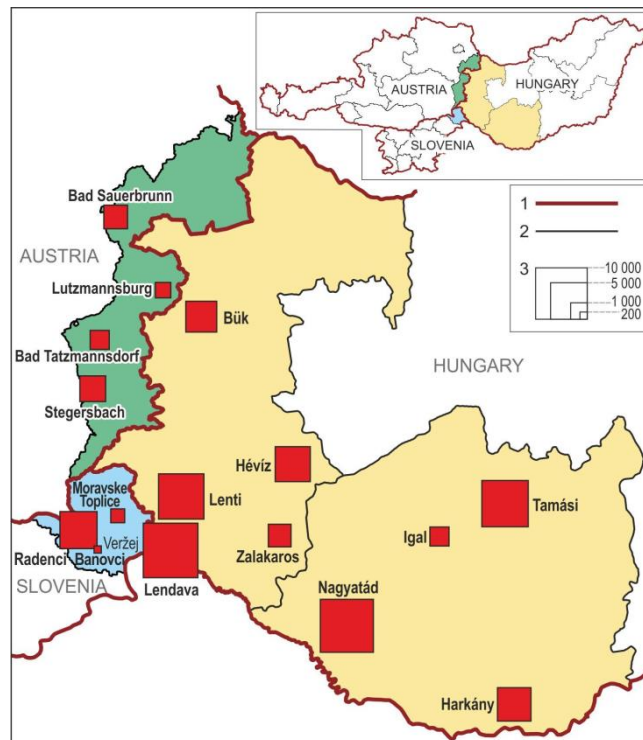


Figure 1 Highlighted settlements with spas in four neighbouring Central European regions

Notes: 1 - State border; 2 - County border; 3 - Settlement size by number of inhabitants.

Source: FONYÓDI V. 2016

In this paper we aim for the approval of our hypothesis (*H1*) stating that regional and settlement conditions essentially decide the potential touristic performance of *the settlements with spas* in the given region, and (vice versa) the spas – medicinal or thermal – have a great additional value for the wealth of the **settlements**, with their impact on the quality of life (QoL) of the local residents (*H2*).

In the table below (*Table 1*) regarding the surveyed 262 European Union Regions, the ranks of the regions chosen for our theoretical research (OTKA¹) prove the strong difference in competitiveness of the Austrian, Slovenian and even between the two Hungarian regions. (RCI 2013).

Table 1 Regional ranking based on RCI and certain sub-indices
*Regional Competitiveness Index

Region /Ranks	Basic Competencies	Efficiency	Innovation	RCI*
Burgenland	103	82	162	110
Vzhodna Slovenija (inc. Pomurska)	152	144	169	155
West Transdanubia	216	180	213	189
South Transdanubia	233	213	191	219

Source: Constructed by the author from data retrieved from RCI 2013

On the basis of the aggregated ranking numbers of each region in the 28 EU member states Austria is 9th, Slovenia 12th and, Hungary 20th, showing a clear picture of the different national development levels.

Table 2 Regional ranking by basic competences and specific sub-pillars of the efficiency index

Region /Ranks	Macro-economy*	Infra-structure	Health	Labour market	Size of markets
Burgenland	9	110	116	42	83
Vzhodna Slovenija (inc. Pomurska)	12	162	198	135	188
West-Transdanubia	19	130	244	148	206
South-Transdanubia	19	225	258	206.	238

* Measured only at national level, ranking represents whole countries.

Source: Constructed by the author retrieved from RCI 2013

From the aspect of spa tourism, the most important, selected by the author from the point of view of competitiveness, sub-pillars representing specific basic competences and efficiency also indicate a major difference in terms of development between the two Hungarian and the two cross-border regions compared.

The aim of our research (H1-H2) is to explore whether, as a result of *spillover effect*, the regions having weaker potential, hence poorer indicators reflecting less developed economy and tourism, could have both regional and local benefit from their settlements with spas in this particular geographical area.

Besides the above mentioned hypotheses, this paper aims at demonstrating some current health tourism trends and results characterising these regions, also highlighting the role of environmental components in visitors' spa preferences.

THE ROLE OF THE ENVIRONMENT IN SPA TOURISM

Health Tourism is a continuously developing sector where, besides the obvious matters of treatment, services, and accommodation, environmental issues have become more important. These include the extent to which a certain spa fits the local environment and the degree to which the feeling of closeness to nature may be preserved for visitors (e.g., the user-friendly nature of the built environment, the size of green areas, the comfort level for

¹ OTKA: National Scientific Theoretical Research Programmes.

visitors and the use of renewable energy sources). These factors play increasingly important roles in the choices made by guests and may generate serious competitive advantage for a spa.

In our study, the most significant environmental factors are presented via the examples of the two neighbouring cross-border regions involved in our research, West Transdanubia and Burgenland. An important part of our publication is the experience of the “Assessment of medicinal and thermal spa competitiveness factors in Hungarian and Central European regions” study tour undertaken in April, 2014, when we visited the most significant spa towns of these regions, in a research project supported by the Hungarian Scientific Research Fund (Hungarian OTKA). With the help of interviews and field trips, we learned the characteristics of the customer base and accommodation supply, developmental specifics, and future plans of spas in both regions. In addition we also introduce the supply and demand factors of the two important competitor regions, South Transdanubia and the Pomurska region.

The role of environmental factors in tourism has been analysed in Hungary from the 1980s (Mezősi 1985, 1991), and many investigate specific areas (Gyuricza 1997, 14). Horváth G. and Kiss G. (2002) mention, as being among the most important factors, uniqueness, naturalness, and spectacle value (landscape, land aesthetics), and recreational value. Among the specific environmental effects of health and wellness tourism, the effects on the flora and fauna should be noted (attention must be paid to the conservation of habitats mostly in the case of healing climate, cave, lake, or mud), and the effects associated with the use of water and land areas (waters used in spas that are often rich in minerals must be expertly handled). (Smith and Puczkó 2008, 53)

In designing and operating Health Tourism facilities, the use of recyclable materials and renewable energy sources and the treatment of used thermal water are becoming more important, and spas paying attention to these and incorporating relevant material in their marketing activity could gain competitive advantage among the more conscious guests.

THE ROLE OF SPA TOURISM IN WEST TRANSDANUBIA AND SOUTH TRANSDANUBIA

Perhaps the most important area of medicinal tourism in Hungary is West Transdanubia, which has unique natural endowments and a continuously developing infrastructural background. The leading role is also due to the effective use of development funds, through which a competitive and diverse supply of medicinal tourism has emerged. By high-quality spa and hotel development a spatially well differentiated service network has grown, where, in addition to baths of international significance (Hévíz, Bük, Zalakaros), lesser spas (Lenti) are also significant.

The internationally known spa towns of the region feature permanently in the top 10 list of the most visited towns in Hungary (*Table 1*). Hévíz, Bük, Sárvár and Zalakaros could also thank their spas and the related tourism services, for having enjoyed for many years a large number of mainly foreign guests. In the top 10 list, not a single South Transdanubian spa is found – a fair reflection of the current difference between the regions.

Table 3: Number of visitor-nights spent in commercial accommodations in thousands, Western Transdanubian spa towns in bold

The most visited Hungarian settlements, 2014 *		
	City	Number of guest nights
1.	Budapest	8,152,775
2.	Hévíz	987,367
3.	Hajdúszoboszló	803,671
4.	Siófok	706,856
5.	Bük	679,835
6.	Balatonfüred	543,500
7.	Sárvár	452,496
8.	Zalakaros	428,900
9.	Sopron	381,645
10.	Eger	371,324

Source: HCSO, 2015

In Hungary from the early 2000s to the end of the 2007 - 2013 planning period several major accommodation and spa investments were realized from national and EU development funds. As a result of this hotel and spa construction or reconstruction, in the settlements concerned, tourism revenues increased, the labour market improved, and often so did the basic and tourism infrastructure (Mundruczó 2005, 11). At national level the

number of visitors and visitor-nights also increased, although in South Transdanubia developments did not bring the expected results.

Spa settlements involved in our research are shown in the following map (Figure 2):

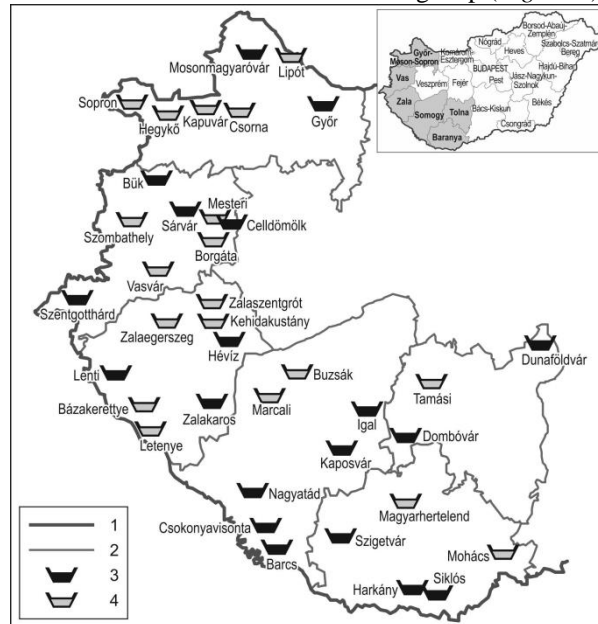


Figure 2: West and South Transdanubian spa settlements involved in this research

Note: 1 - State border; 2 - County border; 3 - Medicinal spa; 4 - Thermal spa

Source: FONYÓDI V. 2016

In spite of its significant natural resources, South Transdanubia continuously loses ground to its domestic competitors, including West Transdanubia. In South Transdanubia the few investments were uncoordinated, general overall improvement was not felt and capacity expansion was not matched by increased demand. This may be due to the ‘siphoning’ power of West Transdanubia, and so the sector is very appropriate for asserting that, no matter how favourable touristic endowments are, only through *properly established hosting capacity* and integrated regional utilization of the reserves of thermal water can they become dominant players in tourism. An outstanding example is the neighbouring Austrian region of Burgenland.

There are regional and national processes which could explain the decline experienced in South Transdanubia. Statistical data back to 1990 confirm that the touristic position of the Region has steadily deteriorated since the Transition. It is continuously drifting and lagging behind its competitors, and even those with a less favourable starting position such as the Great Plain regions have become stronger. If Health Tourism is taken as the basis, it may be that failure is due to more developed West Transdanubian and cross-border medicinal tourism regions ‘siphoning’ off domestic and foreign (Western) demand. Among other reasons could also be that there were no developments in the Region to attract an external investor. Quality (four- and five-star) hotels are lacking due to insufficient investment. The backwardness of the region was also reinforced by old, attractive destinations and baths (particularly Harkány) losing their significance whilst the new products, those restored by EU grants, – Igal, Nagyatád, Tamási – do not attract serious traffic. There is, therefore, no serious medicinal and thermal tourism product to trigger mass interest.

Table 4: Number of visitors and visitor-nights in the West and South Transdanubian spa settlements examined

Number of visitors								
West Transdanubia					South Transdanubia			
	<i>Hévíz</i>	<i>Bük</i>	<i>Zalakaros</i>	<i>Lenti</i>	<i>Harkány</i>	<i>Igal</i>	<i>Tamási</i>	<i>Nagyatád</i>
2011	207,000	154,430	131,294	8,341	46,486	1,916	2,329	3,053
2012	207,226	152,036	121,298	6,477	50,285	n/a	2,305	3,319
2013	204,853	157,692	117,486	6,513	48,636	1,322	2,711	2,616
2014	187,530	166,223	128,250	11,992	50,054	n/a	3,005	3,305
Visitor nights								
West Transdanubia					South Transdanubia			
	<i>Hévíz</i>	<i>Bük</i>	<i>Zalakaros</i>	<i>Lenti</i>	<i>Harkány</i>	<i>Igal</i>	<i>Tamási</i>	<i>Nagyatád</i>
2011	990,980	655,801	436,454	27,719	156,102	6,794	8,170	10,209
2012	1,004,622	635,181	403,133	23,226	163,625	n/a	8,130	10,433
2013	1,048,682	655,957	411,794	17,974	155,179	5,449	9,479	8,942
2014	987,367	679,835	428,900	41,355	155,333	n/a	10,056	10,888

Source: HCSO, 2015

Table 4 above shows the number of visitors and visitor-nights in the relevant Hungarian spa settlements from 2011 to 2014. It is clear that the oldest and most popular spa in South Transdanubia, Harkány, is also unable to compete in volume with the most popular West Transdanubian spa settlements. Already in terms of visitor numbers, Harkány shows a 3 or 4-fold lag, although this increases for visitor-nights compared to Hévíz and Bük. The larger difference in the number of visitor-nights shows that the western spas, due to their services and programmes, are better able to hold their visitors longer. Although the waters of the spas of South Transdanubia are unique, they cannot, due to slow and non-innovative development, hold the visitors longer, and finding new clients is especially hard. Also regarding baths of regional importance, West Transdanubia is more successful. Lenti more than doubled its visitor-nights in 2014 due to continuous development. By contrast, smaller regional spas in South Transdanubia tended to stagnate (Nagyatád) or increased their clientele very slowly (Tamási) in the absence of suitable investment.

The internationally significant West Transdanubian spas of Hévíz, Bük and Zalakaros have produced similar visitor numbers in recent years. In the minor decline by Hévíz in 2014, politic-economic problems affected its most important foreign source of visitors, Russia (the Ukraine conflict, rouble and oil crises), a phenomenon seen in all destinations with Russian clientele, including Hungary.

The role of foreign clientele

Due to individual treatments and high-quality accommodation, foreign clients play a significant role in the most important spas of Hungary. Foreign visitors are important since they spend a relatively long time in a particular area, they use many services and spend substantially more than Hungarian guests.

Table 5: Distribution of foreign visitor-nights in the Hungarian spa settlements examined

<i>Highlighted countries</i>	West Transdanubia				South Transdanubia			
	<i>Hévíz</i>	<i>Bük</i>	<i>Lenti</i>	<i>Zalakaros</i>	<i>Harkány</i>	<i>Igal</i>	<i>Nagyatád</i>	<i>Tamási</i>
Austria	83,442	105,001	14,242	20,372	1,004	157	418	222
Germany	207,048	111,577	5,838	37,245	19,028	1,796	1,113	1,762
Czech Republic	24,423	134,958	1,734	13,835	21,485	33	10	378
Russia	242,882	6,502	364	1,863	2,304	n/a	n/a	n/a
Netherlands	1,283	2,098	421	546	357	45	110	863
Poland	5,652	10,515	319	2,375	1,147	n/a	39	115
Switzerland	16,251	7,285	619	770	412	n/a	55	13
Slovakia	9,945	17,092	137	4,689	948	10	88	38
Croatia	509	434	21	286	783	n/a	18	15
Slovenia	1,929	1,558	365	2,226	171	n/a	97	64
Serbia	431	149	2	351	2,013	n/a	1	n/a
Other	52,070	4,013	871	5,708	1,398	338	532	58
Total	660,508	405,649	25,154	92,347	52,110	2,427	2,571	3,580

Source: HCSO, 2014

In *Table 5* foreign visitor-nights are shown, and in these terms West Transdanubia has absolute superiority due to its quality services and accommodation. In Bük the majority of visitor-nights are spent by foreign guests and in Hévíz the most important guests are Russian. These appeared only in the last few years but they overtook the number of German visitor-nights in 2014. Russian guests stay longer and are characterised by high spending.

German clients are still very important in the field of medicinal tourism both across Hungary and in the region. Germany is a dominant sending country with a long tradition in all the domestic spas examined. In addition to the traditional German client base, the volume of Czech tourists has increased due to the favourable location of the region, and their number constantly grows, especially in the case of Bük, where most overnights are spent by Czechs. The Czechs have a strong interest in high quality medicinal tourism, since there is a very high level of spa culture in the Czech Republic, home to numerous old and prestigious spas. However, a negative trend is that in general a decline in the traditional Austrian guest circle has appeared. At national level the number of Austrian visitor-nights decreased by 4% in 2012/2013 and by 2,2% in 2013/2014 (Hungarian National Tourist Office 2015). Among the reasons can be the development of the spas in Burgenland providing modern, improved services. The spa of Zalakaros is popular rather in the domestic market; in addition to the traditional German clientele, the proportion of Slovenian guests is the highest here due to its geographical location.

South Transdanubian spa settlements attract far fewer foreign visitors; even the internationally significant Harkány has only slightly more than 50 thousand foreign guest-nights. Here the two major foreign markets are the Czech Republic and Germany. The other spa towns of the region examined have more regional significance, and only German guests could be regarded as significant in the case of smaller spas.

Average length of stay

Table 6: Distribution of foreign visitor-nights in the Hungarian spa settlements examined

Highlighted countries	West Transdanubia				South Transdanubia			
	Hévíz	Bük	Lenti	Zala-karos	Har-kány	Igal	Nagy-atád	Tamási
Austria	4.2	3.3	3.9	3.8	4.8	4.2	6.1	6.0
Germany	10.1	8.3	6.8	8.8	7.8	9.7	5.2	10.6
Czech Republic	4.3	3.8	2.7	4.0	5.6	2.5	1.3	3.5
Russia	10.4	6.0	6.5	6.2	8.8	n/a	n/a	n/a
Netherlands	3.3	4.9	3.3	3.5	3.3	4.1	3.4	4.1
Poland	4.7	4.7	1.9	3.5	2.9	n/a	3.0	4.6
Switzerland	7.0	8.6	7.5	6.1	3.5	n/a	4.2	2.2
Slovakia	3.1	2.7	2.1	3.1	3.0	2.5	3.8	3.8
Croatia	2.9	2.6	2.3	2.9	2.3	n/a	1.3	5.0
Slovenia	1.8	2.3	2.5	3.0	2.0	n/a	4.2	4.0
Serbia	3.5	2.8	1.0	2.6	3.4	n/a	1.0	n/a
Average	6.8	4.3	4.0	4.6	5.4	7.6	4.6	5.8

Source: HCSO, 2014

In Table 6 the average length of stay of foreign visitors can be seen in the Hungarian spa settlements. *Medicinal tourism* is usually characterised by longer durations of stay due to the complex treatments offered compared to other branches of tourism, and it can be seen that the longest times were spent by German and Russian guests who undergo long treatments and try many services in a particular spa. The longest stays are in Hévíz, where the town is able to attract foreign guests for long periods with its treatments and varied tourist programmes. Austrian and Czech guests pay shorter visits to destinations in general (3-6 days) but try more wellness services during their holiday. Regarding length of stay, there is a smaller difference between the two Hungarian regions, although with some sender countries (e.g., Switzerland) there is a significant disparity in favour of the more popular West Transdanubia. However, Igal, the small spa in South Transdanubia, clearly provides high value for its German clientele (9.7 days).

SPA TOURISM IN BURGENLAND AND MORAVSKE POMURJE (POMURSKA) IN SLOVENIA

In the neighbouring Austrian region of Burgenland, in recent years ongoing, well-planned developments were implemented, resulting in growing competition for Hungarian spas close to the border. In terms of their offers, they differ from Hungarian practice. The spas in Burgenland are characterised by their *thematic nature* based on their clientele and services; they complement each other's services and address different target groups by creating unique packages for their guests. In respect of the thematic nature among the spas in Burgenland, we can distinguish a family-friendly spa (Lutzmannsburg), a spa with specific medicinal and medical treatment (Bad Sauerbrunn) or one combining golf and wellness (Stegersbach). In addition, the spas of Burgenland are characterised by strong territorial cooperation. Environmental elements also play increasingly emphasized roles in the offerings introduced in detail in the specific analysis of the Burgenland spas. Thanks to this conscious development, a growing number of Burgenland spas are found among the most popular spa settlements in Austria (Table 7).

Table 7: Best Austrian spas (Burgenland spas underlined)

<i>Best Spas in Austria, 2014</i>				
	Wellness category	Entertainment category	Medicinal category	Family category
1.	Avita Therme	Therme Loipersdorf	Parktherme Bad Radkersburg	<u>Sonnentherme Lutzmannsburg</u>
2.	<u>Allergiatherme Stegersbach</u>	Eurotherme Bad Schallerbach	Avita Therme	Eurotherme Bad Schallerbach
3.	Therme Loipersdorf	<u>Sonnentherme Lutzmannsburg</u>	Therme Rogner Bad Blumau	<u>Allergiatherme Stegersbach</u> and Therme Loipersdorf

Source: Webhotels 2014

Pomurska (Pomurje) is Slovenia's historic northeast region and also the centre of Hungarian citizens in Slovenia. A key element of the touristic offer in this area is Health Tourism, a sector characterised by continuously developing infra- and supra-structure. In many cases in the area valuable thermal water was found during intensive crude oil and gas exploration, and these became popular spas. Of the four spa towns included in the analysis, Moravske Toplice is the most popular (thanks to its huge water theme park), whilst Lendava, Radenci and Verzej attract nearly the same number of guests.

Table 8: Number of visitors and visitor-nights in the examined spas of Burgenland and Pomurska

<i>Number of visitors</i>				
Burgenland spa settlements (Austria)				
	<i>Bad Tatzmannsdorf</i>	<i>Lutzmannsburg</i>	<i>Stegersbach</i>	<i>Bad Sauerbrunn</i>
2011	93,944	98,204	84,658	11,349
2012	104,893	79,294	90,481	11,661
2013	102,836	89,013	87,596	11,970
2014	108,993	92,187	91,837	13,301
Pomurska Spa Settlements (Slovenia)				
	<i>Lendava</i>	<i>Moravske Toplice</i>	<i>Radenci</i>	<i>Verzej</i>
2011	29,273	143,748	32,172	29,562
2012	30,669	135,860	33,091	27,817
2013	31,124	135,802	32,587	28,192
2014	32,275	137,581	36,493	29,575
<i>Visitor nights</i>				
Burgenland spa settlements (Austria)				
	<i>Bad Tatzmannsdorf</i>	<i>Lutzmannsburg</i>	<i>Stegersbach</i>	<i>Bad Sauerbrunn</i>
2011	545,492	247,801	218,243	96,499
2012	565,759	201,853	229,838	100,415
2013	531,095	224,603	223,591	106,855
2014	535,509	230,166	232,818	120,534
Pomurska Spa Settlements (Slovenia)				
	<i>Lendava</i>	<i>Moravske Toplice</i>	<i>Radenci</i>	<i>Verzej</i>
2011	111,758	522,767	126,359	112,217
2012	111,133	508,865	137,371	103,961
2013	110,463	496,878	128,630	102,111
2014	114,777	490,564	132,534	103,851

Source: Statistik Burgenland Tourismus 2014, SI-STAT Statistical Office RS Slovenia 2014

Table 8 shows the number of visitors and visitor-nights of Burgenland and Moravske Pomurje. Both regions' spas are popular and permanently stable, and in some cases (Stegersbach, Radenci) have increasing guest numbers. The most popular spas of the two regions reach a total of ca. 500 thousand visitor-nights with different profiles. Whilst in the most popular spa of Burgenland, Bad Tatzmannsdorf, the traditional complex medicinal tourism offer dominated, the most popular spa of Moravske Pomorje, Moravske Toplice, attracts visitors based on wellness and thematic features. The smaller spas can also maintain a steady demand, always above 100 thousand visitor-nights.

Analysing the four regions, although the opportunities appear similar, the popularity of West Transdanubia is still outstanding. In the case of Burgenland, for example, the cause of the backlog in the number of visitors compared to West Transdanubia could be explained clearly by the lack of foreign markets. Analysing the data of the number of visitors and visitor-nights in the summer of 2014 (Table 9) it can be clearly seen that, in the case of Bad Tatzmannsdorf, providing the most popular and complex services, foreign visitor-nights form only 10% of the total; the best value in respect of Stegersbach (specializing in golf and wellness) is also only 16%. As for Bad Sauerbrunn (concentrating on special medical treatment) there are hardly any foreign visitor-nights (1%). In contrast, for Hévíz 67% of visitor-nights, and for Bük 60%, come from foreign visitors (Statistik Burgenland 2014; HCSO 2014). The number of domestic visitors and visitor-nights, however, are very good for the Burgenland spas; with their thematic offers they can more effectively address domestic tourists, who in many cases have given up their holidays and treatments in Hungary in recent years for journeys to Burgenland.

Table 9: Domestic and foreign visitor number and number of visitor-nights in the examined settlements, 2014 summer period

	Number of visitors, 2014			Visitor nights, 2014		
	<i>Domestic</i>	<i>Foreign</i>	<i>Total</i>	<i>Domestic</i>	<i>Foreign</i>	<i>Total</i>
<i>Burgenland</i>	501,656	135,449	637,105	1,464,603	504,106	1,968,709
<i>Bad Sauerbrunn</i>	6,826	225	7,051	63,114	631	63,745
<i>Lutzmannsburg</i>	42,662	4,397	47,059	110,492	14,335	124,827
<i>Bad Tatzmannsdorf</i>	48,065	5,346	53,411	252,493	27,495	279,988
<i>Stegersbach</i>	37,801	4,742	42,543	96,893	18,159	115,052

Source: Statistik Burgenland Tourismus 2014

It is interesting to examine the differences between wellness and medicinal tourism and their effect on the spas of the area. In Stegersbach in 2014 91,837 visitors arrived, who spent there 232,818 visitor nights, the same numbers in the case of Bad Tatzmannsdorf: 108,993 visitors and 535,509 visitor-nights (so hardly 17 thousand visitors are the difference between the two spas, but they still differ by 300,000 visitor-nights). This also indicates the difference between wellness and medicinal tourism, so between Stegersbach and Bad Tatzmannsdorf, since in Stegersbach guests arrive for much shorter periods, for 2-3, maximum 4, days, whilst in Bad Tatzmannsdorf they take long treatments (even for several weeks). In Stegersbach however the rate of returning guests is high - those who come more than once per year for a few days, a wellness weekend or wellness treatment linked to a little golf, or family swimming.

COMPETITIVENESS INDEX OF SETTLEMENTS WITH SPAS (MEDICINAL OR THERMAL BATHS)

The objective of the above-mentioned OTKA study was the formulation of a so-called Competitiveness Index of Settlements with Spas (CISS) and, using CISS, the evaluation and comparison of settlements with medicinal and thermal spas based on their overall and tourism destination competitiveness. The index is based on tourism destination competitiveness models and factors that determine tourism destination competitiveness.

The CISS comprises six sub-indices:

1. *Tourism indicators of a given settlement* (first sub-index):

This group comprises a total of fifteen tourism indicators. These partly relate to guest arrivals (total number of guests, total number of nights spent, average length of stay, etc.) and are either calculated for all guest arrivals or for foreign tourist arrivals only. The rest of the indices relate to tourist accommodation (occupancy rate, income per bed place, etc.). The value of total explained variance is 86,05%

2. *Medicinal tourism indicators* of a given settlement (second sub-index):

This group comprises a total of eight tourism indicators. They focus on a specific segment of the tourist industry, namely medicinal tourism. Here we use only some of the indices in the first group, that is, we use only demand-side indicators and occupancy rate, and calculate them only for medicinal/spa hotels. We extracted a single factor from these indicators. The value of total explained variance is 88.49% and the preconditions for factor analysis are also met.

3. *Indicators of settlement infrastructure* (third sub-index):

This group comprises a total of fifteen indicators and rests on a complex basis. Factors influencing the quality of life of local residents are also important, and so we paid particular attention to the number of houses/apartments with utility services, the size of green spaces in residential areas, the length of paved roads, family doctor and pharmacy services, the number of cars, telecommunication networks, residential homes with Internet connection. We normalised these indices to 1,000 residents. In this way we could compare settlements of different sizes. 73.41% of the information content in this group is explained by five factors.

4. *Economic situation* of a given settlement (fourth sub-index):

This group comprises a total of ten indicators, which relate to the economic situation of a given settlement. Based on the competitiveness factors and models discussed in the previous two chapters, here we included indices describing economic operations and income levels. In order to be able to describe the economic performance/situation of a settlement, we need to quantify local income generation. To this end, we investigated local tax revenues, the employment situation and age structure of the population. We extracted three factors from these indices. (The explained variance is 74.09%).

5. *Social components* (fifth sub-index):

We have also taken into consideration the quality of social services when constructing our model. Here we included a total of ten indicators. These make up the fifth group. The model includes basic demographic variables, variables related to the number of inhabitants (population size), education-related data and the number of those receiving other social services. We also investigated public safety as a significant positive component based on the Tourism Penetration Index (TPI). This group can be described using three factors with a total explained variance of 85.30%. The conditions of factor analysis are also met.

6. *The characteristics of local baths* (sixth sub-index):

This section summarises the results of questionnaire data collection, expert interviews and website analyses. Here we included seven indicators. These are based on primary research involving *questionnaire data collection from 1,000 respondents*. Our objective was to identify the criteria based on which Hungarians choose a destination, and to assess how famous and popular individual baths are. The indicators we built into the competitiveness index reflect how renowned and frequented individual baths are, the numbers who would potentially choose a given bath as a holiday destination and hence, the number of potential visitors. This enabled us to analyse demand-side trends. We used two factors to incorporate bath-management-interview results, average scores from bath-website evaluations, and the indicators describing the baths into our model. Here the total explained variance is 63.61%.

In calculating the **Competitiveness Index of Settlements with Spas (CISS)**, we built on the widely used Tourism Penetration Index (TPI), which is, in essence, a complex tourism impact index (McElroy and Albuquerque 1998). It “condenses” the economic, social and environmental impacts of tourism into a single number. Based on previous work and building on the logic behind the TPI, but using six sub-indices we constructed the CISS.

We calculated the values of indicators based on the square technique using the expression:

$$T = \frac{X}{X_{max}}$$

where

- $T =$ the values of indicators in the specific columns
- $X =$ the value of a given indicator with respect to a given settlement
- X_{max} the maximum value of the given indicator with respect to the group of settlements included in our analysis

The Competitiveness Index of Settlements with Spas highlights the significance of covariance between individual components. Therefore, those settlements were given high overall scores, that is, those were considered more competitive which did well in most or all categories, as opposed to those which did exceptionally well in a given category. We needed to normalise individual indicators in order to make them directly comparable. As a result, sub-index values fell between zero and one. Differences in scale proved to be a problem. For example, in the case of unemployment, the smaller the value, the more favourable the situation. In contrast, in the case of assessable income, the opposite is true. In these cases we reversed the scale items. We assigned weights to the individual indicators which contributed to a given sub-index. The weights were determined by factor analysis. First, we used a single factor, which had the largest explanatory power, in the case of each sub-index. On the one hand, this proved to be a good decision as this helped reduce the number of variables. On the other hand, however, this resulted in the loss of certain key – primarily tourism-related – components from the index, such as average length of stay in a tourist accommodation establishment (rented accommodation). Therefore, we had to modify our strategy and use the weights that were largest in absolute terms in our analysis. We then calculated the CISS as an average of the six sub-indices.

We selected the indicators, bearing in mind that tourism is not a fundamental determinant of a settlement’s competitiveness. It rather utilises the economic, social and infrastructural potential of the settlement. In this context, medicinal and spa tourism, which is a special segment of the tourist industry, has particular significance for settlements with medicinal and thermal spas. The *figure below* describes the relationship between the individual model components.

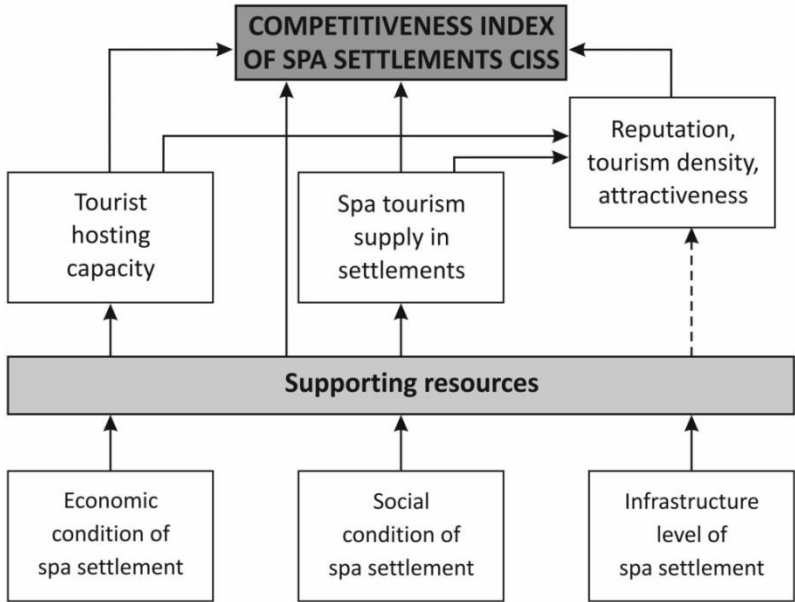


Figure 4: The construction of the CISS
Source: The author’s construction

As shown in the above figure, the indicators/components that were used to construct the CISS fall into two main categories. On the one hand, the economic, infrastructural and social attributes of a settlement determine its

competitiveness. While tourism itself is not a determining factor, it can improve a settlement's competitiveness. The three pillars that represent the foundations of a settlement's competitiveness should be regarded as auxiliary resources, when constructing a competitiveness index with a focus on tourism. While the development of these resources is not specifically targeted at tourism-related goals, it helps create a favourable environment for tourism. The tourism-related attributes of a settlement (primarily the number and occupancy rate of tourist accommodation establishments), and the indicators that reflect a settlement's unique appeal (such as medicinal-tourism-related services, medicinal and thermal spas) are those elements of the CISS, which set it apart from other methods that examine the competitiveness of settlements. Most of the data used in this study are from 2014. Where no datasets were available from the Hungarian Central Statistical Office (HCSO: KSH) from that year, we used data from 2012.

Data sources and reference periods

Questionnaire data were collected by an opinion research company within the framework of the OTKA study. A thousand respondents were selected from spas countrywide.

All T-STAR (2014) data, where available, were downloaded from the website of HCSO (KSH).

Interview scores from one to five were assigned based on expert opinion. In most settlements we conducted interviews with a representative of either the Tourism Destination Management Organisation (TDMO) or the local authority, and with the management of the spa. We averaged the scores given by the six experts separately for the TDMO or municipality and for the spa. These two averages were then treated as two separate components of the competitiveness index. In some cases we could not conduct interviews either with the TDMO/municipality or with the spa. In these cases we set the interview scores to zero.

Website analyses were prepared in the summer of 2015. The websites were assessed along 47 evaluation criteria. The maximum score that could be given in the different categories were 0.25, 0.5 or 1.0, while the minimum score was zero. Thus the maximum overall score that could be given to a website was 25.

Per capita purchasing power data (2014) were obtained/bought from the GfK Hungária Market Research Company. The dataset was a mixture of settlement and sub-settlement data. Where we had only sub-settlement data, we weighted the per capita purchasing power values with the populations of the respective sub-settlement units, to get the per capita purchasing power value for the entire settlement. In this way we acquired purchasing power data for all of the 38 settlements included in the present study.

Index-construction methodology

We conducted our statistical analyses using SPSS 22, relying on factor analysis in constructing our index. We chose this method because we were working with different data types, the analysis of which would have been problematic following standard procedures. Using factor analysis we could reduce the number of variables, by replacing the original variables with a smaller number of new variables, called principle component vectors, while minimising information loss in the process.

First, we extracted factors from the indicators that contributed to the respective sub-index, using Principle Component Analysis (PCA) and Varimax rotation. *Table 10* below summarises the results of factor analysis.

Table 10: Results of factor analysis.

<i>Sub-index</i>	Number of factors	Total explained variance	Kaiser-Meyer-Olkin (KMO) Test	Bartlett's Test y-value	Bartlett's Test p-value
Tourism	4	86,05%	0,670	686,3	0,000
Medicinal bath	1	88,49%	-	-	-
Infra-structure	5	73,41%	0,637	270,0	0,000
Economy	3	74,09%	0,625	218,3	0,000
Social	3	85,30%	0,610	91,3	0,000
Bath	2	63,61%	0,576	91,0	0,000

Source: PÓTÓ ZS., 2016

In the case of each sub-index we applied factor analysis to the respective set of indicators/components. Secondly, we calculated the following sub-indices for each settlement:

$$T = \sum f_i x_i$$

where

- $T =$ the value of the sub-index
 $x_i =$ the value of the i^{th} variable contributing to the sub-index
 $f_i =$ the value of the rotated weight of the i^{th} variable

The calculated values of the six sub-indices are summarised in *Table 11* below.

Table 11: Sub-index values

Settlement	Sub-indices					
	I	II	III	IV	V	VI
Barcs	774	0	5072	222136	16	163
Bázakerettye	689	0	2439	29528	54	141
Borgáta	8860	0	2517	23803	81	165
Buzsák	4915	0	662	44038	14	122
Bük	95106	63 712	3751	563132	78	248
Celldömölk	184	0	8432	435429	35	181
Csokonyavisonta	95379	0	4584	20790	11	159
Csorna	1278	0	2931	255449	40	157
Dombóvár	36868	0	4377	433192	35	184
Dunaföldvár	12768	0	1424	243161	33	144
Győr	44722	0	9768	14223228	151	167
Harkány	63244	15 548	16048	363433	100	231
Hegykö	48029	0	895	70069	114	164
Hévíz	92231	271 918	3611	782055	60	263
Igal	15203	0	2265	73507	68	203
Kaposvár	26278	0	10508	2365893	45	169
Kapuvár	3121	0	3689	274892	36	163
Kehidakustány	64196	0	585	51838	51	241
Lenti	52072	0	2474	248269	25	175
Letenye	52	0	1579	86805	52	149
Lipót	64417	0	847	30163	87	192
Magyarhertelend	8130	0	732	17828	-11	174
Marcali	313	0	2378	378199	43	176
Mesteri	137	0	667	11435	89	154
Mohács	31901	0	3250	537753	27	145
Mosonmagyaróvár	42367	0	5808	1862246	73	162
Nagyatád	55018	0	6660	285752	11	166
Sárvár	84085	7 238	5296	1004009	44	236
Siklós	410	0	6004	201970	40	173
Sopron	25808	0	10071	2844738	90	152
Szentgotthárd	35150	0	2066	575603	72	177

Szigetvár	17116	0	17533	336235	12	175
Szombathely	29634	0	11187	4656854	65	133
Tamási	19092	0	1871	212717	11	169
Vasvár	546	0	1130	139111	51	133
Zalaegerszeg	32149	0	19696	3037578	60	176
Zalakaros	66314	77 198	5951	303969	122	252
Zalaszentgrót	39	0	955	196587	18	187

Source: PÓTÓ ZS., 2016

The original variables differ in units, scale, and hence dispersion. Thus, the sub-indices in *Table 11* also differ in scale. In order to put all sub-indices onto the same scale, we applied the following equation to our data:

$$M = 100 \times \frac{X - X_{min}}{X_{max} - X_{min}}$$

As a result all sub-index values fell between 0 and 100. However, we made an exception in the case of sub-index II (which relates to medicinal tourism). Here we used a coefficient of 10 instead of 100 in order to reduce the dispersion of the corresponding values. The reason being that out of the **38 settlements** that were included in our study, only five had spa hotels, which resulted in a large number of zeroes in the corresponding column in *Table 12*. Had we decided on a coefficient of 100 in this case too, the spread of values would have been much larger in the case of *sub-index II* than in the case of the other five sub-indices.

Table 12: Re-scaled sub-index values

Settlement	Sub-indices					
	I	II	III	IV	V	VI
Barcs	774	0	5072	222136	16	163
Bázakerettye	689	0	2439	29528	54	141
Borgáta	8860	0	2517	23803	81	165
Buzsák	4915	0	662	44038	14	122
Bük	95106	63 712	3751	563132	78	248
Celldömölk	184	0	8432	435429	35	181
Csokonyavisonta	95379	0	4584	20790	11	159
Csorna	1278	0	2931	255449	40	157
Dombóvár	36868	0	4377	433192	35	184
Dunaföldvár	12768	0	1424	243161	33	144
Győr	44722	0	9768	14223228	151	167
Harkány	63244	15 548	16048	363433	100	231
Hegykő	48029	0	895	70069	114	164
Hévíz	92231	271 918	3611	782055	60	263
Igal	15203	0	2265	73507	68	203
Kaposvár	26278	0	10508	2365893	45	169
Kapuvár	3121	0	3689	274892	36	163
Kehidakustány	64196	0	585	51838	51	241
Lenti	52072	0	2474	248269	25	175
Letenye	52	0	1579	86805	52	149
Lipót	64417	0	847	30163	87	192
Magyarhertelend	8130	0	732	17828	-11	174
Marcali	313	0	2378	378199	43	176
Mesteri	137	0	667	11435	89	154
Mohács	31901	0	3250	537753	27	145
Mosonmagyaróvár	42367	0	5808	1862246	73	162
Nagyatád	55018	0	6660	285752	11	166
Sárvár	84085	7 238	5296	1004009	44	236
Siklós	410	0	6004	201970	40	173
Sopron	25808	0	10071	2844738	90	152
Szentgotthárd	35150	0	2066	575603	72	177
Szigetvár	17116	0	17533	336235	12	175
Szombathely	29634	0	11187	4656854	65	133
Tamási	19092	0	1871	212717	11	169
Vasvár	546	0	1130	139111	51	133
Zalaegerszeg	32149	0	19696	3037578	60	176
Zalakaros	66314	77 198	5951	303969	122	252
Zalaszentgrót	39	0	955	196587	18	187

Source: PÓTÓ ZS., 2016

While sub-indices can be used to rank settlements, they are not directly comparable.

In the third and final step we thus constructed a **composite index** by taking the average of the six sub-indices:

$$CISS = \frac{T_{tourism} + T_{medicinal} + T_{infrastructure} + T_{economic} + T_{social} + T_{bath}}{6}$$

Table 13: Settlement-competitiveness sub-dimension, composite-index values and the ranking of settlements

Settlements with Spas	Sub-dimensions						Composite index	Ranking
	I	II	III	IV	V	VI		
Győr	12	6	7	1	1	21	54,4	1
<i>Harkány</i>	8	4	3	15	4	6	49,3	2
Zalakaros	5	2	11	17	2	2	46,1	3
Hévíz	3	1	19	8	15	1	45,3	4
Bük	2	3	17	10	9	3	44,5	5
Zalaegerszeg	16	6	1	3	14	14	39,6	6
Sárvár	4	5	13	7	21	5	39,1	7
Kehidakustány	7	6	38	31	19	4	31,7	8
Sopron	20	6	6	4	5	31	30,1	9
Lipót	6	6	34	33	7	8	29,8	10
Szombathely	18	6	4	2	13	36	29,0	11
Mosonmagyaróvár	13	6	12	6	10	27	27,5	12
<i>Kaposvár</i>	19	6	5	5	20	19	27,3	13
<i>Szigetvár</i>	22	6	2	16	34	16	26,8	14
<i>Csokonyavisonta</i>	1	6	15	36	35	28	26,8	15
<i>Hegykő</i>	11	6	33	30	3	24	26,6	16
Szentgotthárd	15	6	27	9	11	12	23,1	17
<i>Nagyatád</i>	9	6	9	18	36	22	22,6	18
<i>Dombóvár</i>	14	6	16	13	27	10	22,3	19
<i>Igal</i>	23	6	26	29	12	7	21,9	20
Lenti	10	6	23	21	30	15	21,0	21
Celldőmök	35	6	8	12	26	11	19,1	22
Borgáta	25	6	22	35	8	23	17,7	23
<i>Siklós</i>	33	6	10	25	24	18	16,3	24
<i>Mohács</i>	17	6	20	11	29	33	15,2	25
Mesteri	36	6	36	38	6	30	14,2	26
<i>Marcali</i>	34	6	25	14	22	13	14,0	27
Kapuvár	28	6	18	19	25	25	13,2	28
<i>Tamási</i>	21	6	28	24	37	20	12,4	29
Csorna	29	6	21	20	23	29	11,9	30
<i>Barcs</i>	30	6	14	23	32	26	11,9	31
Zalaszentgrót	38	6	32	26	31	9	11,2	32
Bázakerettye	31	6	24	34	16	35	10,7	33
Letenye	37	6	29	28	17	32	10,6	34
<i>Dunaféldvár</i>	24	6	30	22	28	34	10,3	35
Vasvár	32	6	31	27	18	37	8,4	36
<i>Magyarhertelend</i>	26	6	35	37	38	17	7,7	37
<i>Buzsák</i>	27	6	37	32	33	38	3,5	38

Source: PÓTÓ ZS., 2016

The analysis of individual CISS components

Following our index-construction methodology, described in the previous sub-chapter, we calculated a score for each settlement, which then translated into a clear ranking of settlements. In order to understand the final ranking of settlements, first we have to analyse and compare the different sub-dimension-based rankings of these settlements (*Table 13*).

It is obvious from *the highlighted* top ten Hungarian settlements out of the 38 included in this study in the table above that there are significant regional differences. The dominance of western Transdanubian settlements with spas/baths is evident: with the exception of Harkány, all the others can be found in this region. The three most important settlements with respect to medical and thermal spa tourism, namely Hévíz, Bük and Zalakaros, score particularly high along sub-dimensions I and II (tourism-related indicators). Whereas the overall ranking of settlements is in line with our expectations, the high ranking of two western Transdanubian cities with spas is somewhat unexpected among the other settlements with baths. The high ranking of the two small settlements of Kehidakustány and Lipót is striking next to the two cities with economic (competitiveness) potential. However, this supports our hypothesis, that medical and thermal baths/spas play an important role in improving/increasing a settlement's competitiveness. Nonetheless, in order to understand the underlying mechanisms, we need to conduct a number of studies, which can shed light on the role that individual sub-indices, and hence certain indicators/components, play in determining competitiveness.

Table 13 suggests that, overall, settlements with medical spas score higher in our CISS-ranking. The average score of the 19 settlements with medical spas is higher than of those with thermal baths. We can get a more accurate picture, if we have a closer look at those sub-indices (i.e. I, II, and VI) that measure tourism-related competitiveness. There are significant differences between the rankings based on the tourism-related sub-indices too: the mean score of settlements with medical baths is higher than of those with thermal baths. Sub-index VI measures how renowned individual baths are. Here the ranking of settlements with medicinal spas is again more favourable than of those with thermal baths. Therefore, we can conclude that *settlements with medicinal spas are more competitive*. However, in the present study we can only document this relationship, but we cannot investigate the causality between the type of bath a certain settlement has and the ranking of the settlement. This requires further statistical analysis.

Amongst the spas with unique/rare spring-water composition Harkány, Hévíz, Bük, Zalakaros, and Sárvár all got top rankings. All five settlements score higher along the tourism-related sub-dimensions than along sub-dimensions measuring the settlement's general competitiveness.

CONCLUSION

Of the three countries discussed, Hungary has the largest Spa Tourism sector and some tradition – including strong state support in the Socialist era. However, disposable incomes are low and if the domestic sector is to survive, foreign visitors are needed. So far these have mainly come from Germany; other sources are much weaker and less reliable. Austria is the wealthiest and most advanced socially and culturally, but the Austrian tradition is to holiday at home. Slovenia displays features of both.

These observations may explain some of the points above, but they offer little encouragement to the Hungarian Spa sector without a pro-active approach – regional ‘co-opetition’ being an obvious example of what is needed. Spa tourism is the most significant touristic product of these regions, but our study showed that only innovative development sensitive to demand can help many spas to survive in an increasingly competitive market.

Serious environmental factors now play a greater role irrespective of location. Visitors are more aware and sensitive and their demands increase, influencing their choice of destination. In terms of the environment, the spas in Burgenland currently lead those of West Transdanubia, but the developments in Hungarian spa settlements are also moving in the right direction - mainly in the fields of material usage and environment-friendly transport. Every service provider should consider these factors as environmentally conscious improvements do mean competitive advantage for a spa.

Taking into consideration the current situation and the trends examined and explored in this paper, we can conclude that in the analysed geographical region, due to the *spill-over effect*, the more developed regions having spas, will, at least in the medium term, see a positive impact on the tourism of the less developed Hungarian regions - so fostering competitiveness and (consequently) wealth creation and a higher quality of life for residents of settlements with spas in their particular regions.

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