

REGION SPECIFIC CHARACTERS OF TOURISM IN EAST-CENTRAL EUROPE

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Abstract: From the comparative analysis of the tourism of East-Central Europe before and after the change of the regime the system specific features mark out which detach the two era very specifically. The closed world of socialism in tourism meant the strengthening and privilege of domestic tourism and the so called social tourism. Their share of international tourism is very nominal, the determining countries were Hungary and Yugoslavia. After the change of the regime the internal tourism appeared on the market economy as well, the motivations of travels were targeting new destinations. In this open competition Hungary lost its earlier regional role however thanks to its development programs some quality changes appeared from 2000 out of which we should highlight the conversion of the accommodation structure and the strengthening of the health tourism destinations. In the last 25 years the social-economic tourism changes in the region propose the rethinking of East-Central Europe as well. The Central-European countries were integrating and orienting to the challenges of the world tourism market while the same processes appear only very slowly in Eastern-Europe.

Key words: tourism, East-Central Europe, Hungary

1 INTRODUCTION

The primary aim of this paper is the systematic analysis of the characteristic processes and parameters of tourism in the context of its historic framework. By the comparative analysis of the processes before and after the change of the regime the quantity and quality marks of tourism breaks surface and also the different approaches to tourism of the countries formerly having considered as homogeneous, within that especially Hungary. The tourism demand and supply reacted with alternative approaches to the widely different world political and economic environment which schematic reveal demonstrates the typical system marks and the altering country specific characters.

2 THE TOURISM OF EAST-CENTRAL EUROPE BETWEEN 1945-1989

After 1945 the countries of East-Central Europe¹ created a peculiarly closed world and so the connections within the region were dominated by distrust. All this of course determined the role and place of the tourism sector as well; characteristic to the system the tourism of the region can be described with *common features*, however certain countries detached themselves from the average with *specific characters*. The two basic types of tourism showed extreme disproportions in this era as business tourism was restricted to the level of interstate relations and contracts, which was realised by a very small bunch of people, so we can hardly talk about business tourism as we consider it today.

The major form of leisure tourism was social tourism, which had two pillars: the trade union and institutional vacations and the supported youth tourism. Within the region the turnover within one another was ruled by the traffic of the tourist groups and it was only after the 1960s when the way was made for the individual travellers. The organised travels were transacted by the state or cooperative travel bureaus. With their established national network they both organised the inbound and outbound tourist flows (such as IBUSZ, CEDOK, ORBIS, INTOURIST, BALKANTOURIST, CARPAT). The trips to the West were restricted, they were bound to outbound travel visas and currency supplies. Behind the preferred industrial branches the development possibilities of tourism were opened very late so the era was all the way characterised by demand controlled supply development. Within the region central developments and actions were carried out primarily in Yugoslavia, Hungary and partly Bulgaria and in the second half of the era, drawing in the private sector, the services were developed as well.

On the whole in 1988 East-Central Europe realised 12.4% of all the international tourist flows with 48 million travellers (Fig. 1), but out of the international receipts it generated only 1.2% (2.3 billion USD) and from the international tourism spending only 0.6% (1.3 billion USD) (Lengyel, 2004).

The above featured rather pessimist representation about the tourism sector is modulated by the fact that these strict forms of leisure activities, the ideology to keep the people at home, necessitated the development of tourism infra and supra-structure which is the base for every kind of supply and guest catering. With this process, still with rather discrete quality parameters, those foundations were established with which after the change of the regime the countries of this region could build their independent tourism industry.

¹ Many concepts have been made in terms of the regional subdivision of Europe. As a starting point, from the point of view of the paper, we considered the part of Eastern Europe which was divided by the iron curtain under the rule of the Soviet Union, which was differentiated by Halecki in the 1950s. In Hungary, Enyedi (1978) applied this term for the eight independent socialist states. When analysing the period before the change of the regime we have to consider the Soviet Union as well because tourism also carried the features of the system which determined the major processes.

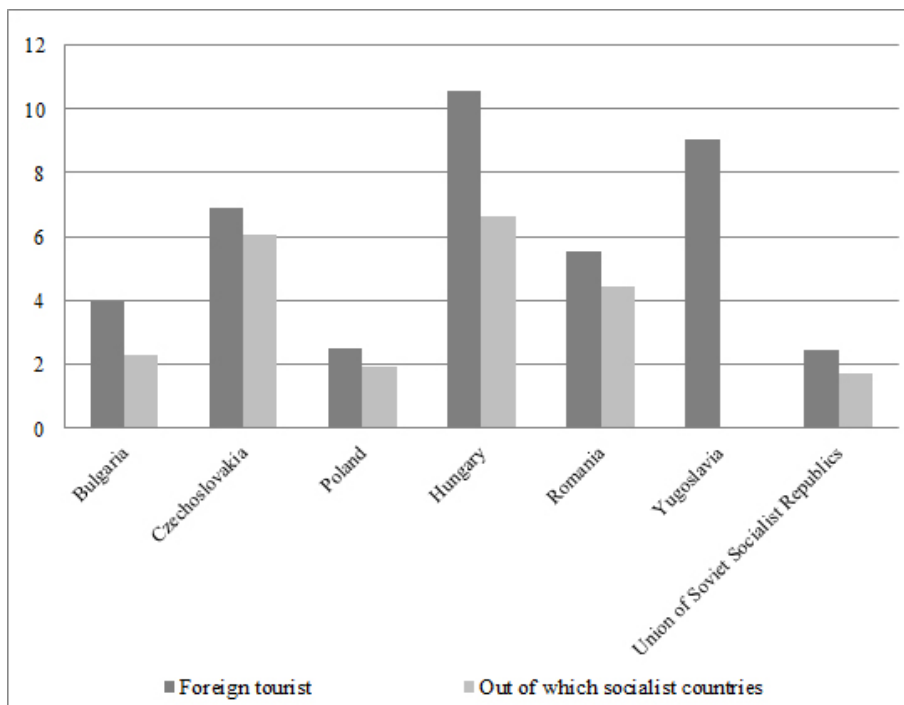


Figure 1 Number of international tourist arrivals in the countries of East-Central Europe (1988, million persons). Source: Based on Lengyel (2004). Edited by: Aubert (2013)

3 TOURISM IN HUNGARY IN THE SOCIALIST ERA

Even in an East-Central European comparison, tourism developed into a *more and more significant economic branch* taking into consideration the economy of the socialist Hungary. It is characteristic to the role of the country within the region that by 1990 the number of international tourist arrivals was 43.8 million persons in East-Central Europe out of which Hungary possessed a 47% share, while in the same comparison out of the international tourism receipts (4.8 billion USD) the country's share was 17% (Lengyel, 2004).

Looking at the spatial and settlement concentration of the guest flow the consequences of this policy can well be followed since an unbelievably great amount of tourist flow charged certain tourism regions and settlements. Lake Balaton is the most adequate example for this phenomenon, where at some popular settlements it is characteristic to the guest flow that in 1979 in Siófok the number of guest nights reached 1.4 million, in Balatonfüred 1 million and in Boglárlelle 600,000. The ranking of guest nights in commercial accommodations in the spa towns of Hungary is: Hajdúszoboszló 1 million, Harkány 516,000, Hévíz 260,000 guest nights. The

centres for historical-cultural attractions were led by Miskolc with 870 000 guest nights followed by Szeged (460,000), Eger (420,000) and Pécs (410,000) (Fig. 2).

In the socialist era the dependence from the central sources, the differentiated development priorities and the continuous narrowing of resources were also present in the spatial processes of tourism. An exaggerated spatial image of tourism infrastructure was formed with the depressing superiority of Budapest and Lake Balaton. On the map of the rural Hungary the highlighted tourism zones, the settlements with medicinal and thermal spas and the historical-cultural cities (Miskolc, Szeged, Eger, Pécs) provided a local centre for tourism.

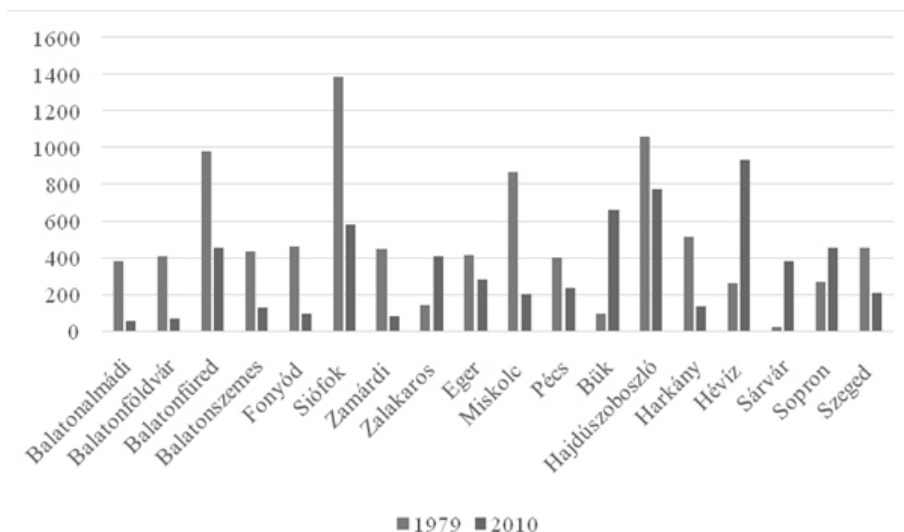


Figure 2 Some settlements with significant guest flow between 1979-2010 in Hungary (1,000 guest nights). Source: CSO/KSH. Edited by Pálfi (2013)

4 THE ALTERATION OF THE TOURISM DEMAND IN THE REGION AND IN HUNGARY FROM 1989 UNTIL NOWADAYS

After the change of the regime the international tourism demand towards East-Central Europe practically doubled (Fig. 3). Its major reasons were the free travel to the region and the developments on the supply side both concerning the destinations and the accommodations and further on also the more and more valorised international tourism marketing.

After the collapse of the Soviet Union the tourism of Russia and the Baltic states showed a completely different way of development than the other countries of East-Central Europe. Russia, fundamentally based on its economic power, became

one of the most important sending countries of today and the Baltic States are more and more connected to the North European countries (Aubert et al., 2011). Based on these premises we analyse those countries from era after the change of the regime which have a quite similar way of development as Hungary or they became competitors of each other in the last two decades. Based on these we analyse those countries from the era after the change of the regime which have a quite similar way of development and so they became competitors of Hungary in the last two decades.

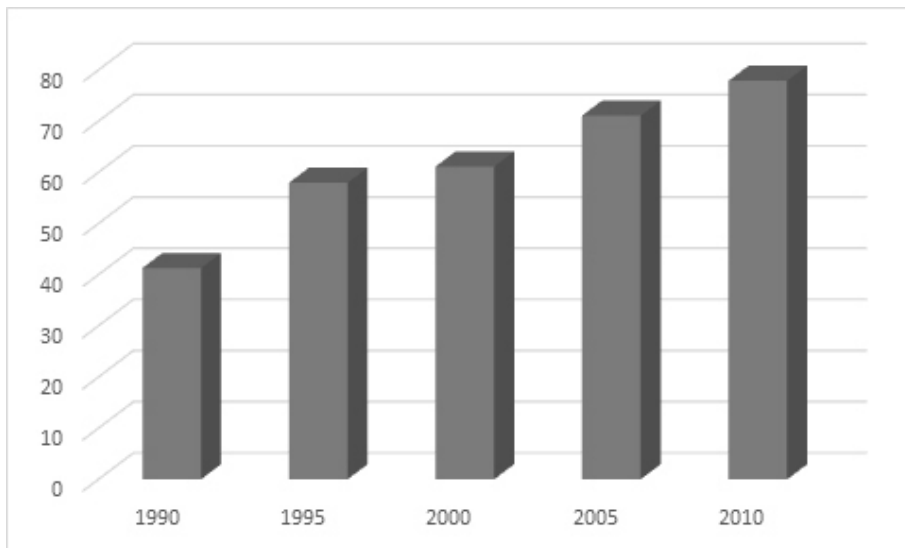


Figure 3 The number of international tourism flow to East-Central Europe (million person). Edited by: Based on UNWTO Marton (1990-2011)

If we analyse the international demand for the certain countries (Fig. 4) we receive much more exaggerated values. The countries demonstrating slow but continuous growth are: Slovakia, Slovenia, Serbia. The one showing initial decrease followed by a dynamic increase: the Czech Republic, Croatia, Romania and Bulgaria. The Ukraine shows a significant increase in which case we can suggest that the statistics contain the transit traffic as well (Aubert et al., 2011). The ones showing significant decrease are Hungary and Poland. In this latter country (Poland) supply reveals a significant decrease not after the change of the regime but compared to the following years.

The 1990s resulted an interim period in the tourism of Hungary, since the social-economic changes as a consequence of the change of the regime touched and shocked the environment of tourism at its basis. In the beginning of the 1990s we can witness a loss of market which was followed by from the middle of the decade a restructuring of guest flow. This process is supported by the change of the international tourist arrivals, which from 20 million – characteristic until the middle of the 1990s – showed a continuous decrease, than in the 2000s it was stabilised around

15-17 million persons. In the background of this fallback, besides the disappearance of the “curiosity” feature of this region, we find such external environmental affairs and processes as the more dynamic development of the direct competitors in East-Central Europe, the termination of the constraint internal traffic between the former socialist countries, or the south Slavic/Balkan conflict. However, besides the above mentioned e should not forget about change in the tourism sector which quickens the innovation and the flow of information. For Hungary the decade of the 1990s can be considered as lost from the point of view of tourism since besides the spontaneous, point source tourism developments the realisation of conscious and planned programmes were not carried out (Aubert, 2001). From the middle of the 1990s the improvement of the macroeconomic performance also played a role in the quickening of the turnover (Michalkó, 2007).

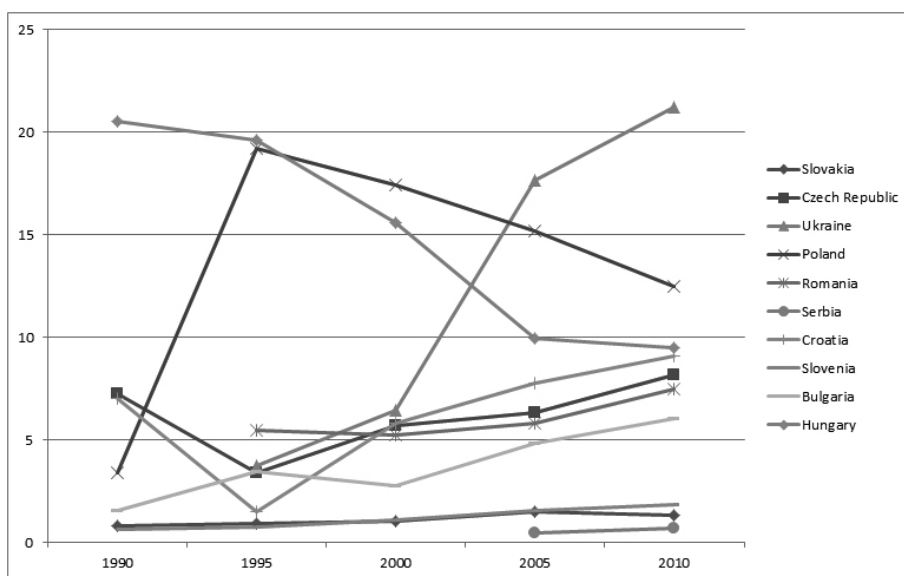


Figure 4 The number of international tourism flow to the countries of East-Central Europe (million person). Edited by: Based on UNWTO Marton (1990-2011)

Out of the index numbers characterising *tourism demand* the number of guest nights, demonstrating the best the situation of the sector, shows a decreasing tendency in the researched period. The 19.5 million guest nights in 2011 is 2.7% less than the value on 1990. *The differences within the country and within the region grew.* The most significant changes were running their course in Transdanubia, which is explained by Csordás (2012) with the concentration of the spa developments towards Western Hungary. Thanks to the health tourism developments of the region today it realises 22% of all the guest nights in the country. If we take into consideration the internal structure of the Hungarian guest flow than we can state on the national level that despite of the collapse of tourism in the 1990s it could gain

strength in the 2000s which is also a result of internal and external processes. The bottom of this was the year 1990 when on the national level the ratio of the foreign guests grew to 68%, while to related guest nights grew to 76%. By the 2000s among the internal factors of strengthening the domestic tourism we take the appearance of state involvement outstandingly important such as the initiation of financial incentives as for example *the holiday voucher system*. Tab. 1 demonstrates the demand for the holiday voucher and the number of tourists pressing it into service. The fallback in 2011 can be twitted with the alteration of the former system.

Table 1 The conformation of the turnover of holiday voucher (1998-2011)

	1998	2000	2005	2010	2011
voucher disposal (million HUF)	1 657	2 051	10 200	46 171	30 110
number of voucher owners (1000 persons)	98	120	493	1 600	664

Ed: Based on Magyar Turizmus Zrt. and CSO/ KSH Pálfi (2013)

Another factor was *the strengthening of the international competition and the neighbouring war conflict* as a consequence of which in the decade of the change of the regime the foreign demand to Hungary decreased by 25%, while the tourism income have tripled. While in the 1990s nationwide 60.8% of the guest nights were realised by foreigners, today this ratio fall back to 52.2% (however by the middle of the 2000s it was under 50%). By today, except for Central-Hungary, the share of the domestic guest nights exceeded 50% in all the regions of Hungary. The most significant fallback was experienced in Central and South Transdanubia where from 72% and 65% the ratio of foreign guest nights decreased to 32% and 28%.

Fig. 5 shows the time of the demand changes of each region from the point of view of when the measure of the domestic demand exceeded the foreign demand. It can be well seen that we talk about a – decade long – continuance in which the national data reaches the turning point at the end of the period, only in 2008.

However, it still causes a problem that within the foreign tourism demand the share of same-day travellers (64%) is very high (out of which 45% is transit traveller) and within that the ratio of the neighbouring countries as well. In the last two decades *the restructuring of the foreign guests* has been started so besides or instead of the classic guests new sending countries appeared in the Hungarian market. Besides the traditionally most important sending market of Hungary (Germany) (Fig. 6) the East-Central European guests are present again (Sulyok, 2008).

Summing up we can state that the dominant position of Budapest further grew, however, besides Lake Balaton, the Western Transdanubian Region also significantly strengthened. The increase of this latter however, is the consequence of the capacity growth of some spa towns. Based on their guest flow, aside the long outstanding Hévíz (1,005,000 guest nights), Bük (635,000 guest nights) and Zalakaros (403,000 guest nights), in the latter years Sárvár (453,000 guest nights) also closed up (CSO/KSH, 1978-2011). Beyond the favourable turnover allocation of the men-

tioned settlements they achieved their position improvement due to the significant attraction (health tourism resort) and the accommodation developments.

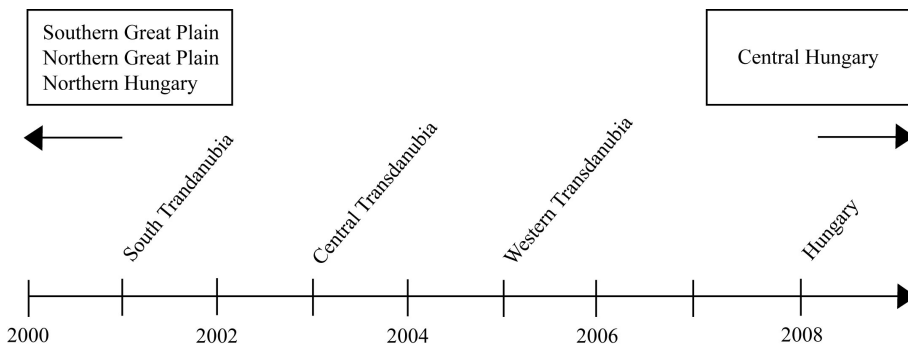


Figure 5 The break-even point of foreign/domestic guest nights in Hungary at the 50/50% share of foreign/domestic guest nights. Source: Based on CSO/KSH data edited by Aubert and Berki (2009)

5 THE CHANGE OF THE TOURISM SUPPLY IN THE REGION AND IN HUNGARY FROM 1989 UNTIL TODAY

The development in tourism supply at the countries of East-Central Europe after the change of the regime was based on two pillars: on the one hand it is based on their traditional attractions (such as spa towns) and the units built in the socialist era satisfying the needs of the so called “social tourism”. Every country of the region modernised their tourism’s supply side based on demand needs and the principles of the market economy with the cooperation of their resources, the available capital and the foreign investors. As a consequence of these developments an extremely differentiated supply was formed in the region both form quantitative and qualitative points of view.

The development of Hungary’s tourism can be divided to two parts: the 1990s which can be considered as a quest period for the way out of the given situation (we also have to add here that at some countries, such as Romania, Slovakia this process was drawn out), and the period from the Millennium until nowadays indicating an era of intense development adjusting to the world tourism trends. Taking into consideration the tourism development course of East-Central Europe the development of the accentuated tourism destinations, so the creation of the traditional products characteristic to each country, the quality accommodation development, the strengthening tourism marketing and destination management, came to the front.

The region univocally latched on to world tourism and within that its role continuously grew. The Czech Republic and Slovenia emerge from the region, so they serve as a positive example to the other countries of the region. From the point of view of Hungary, Tab. 2 summarises those products of the East-Central European region which appear as direct competitors in the market.

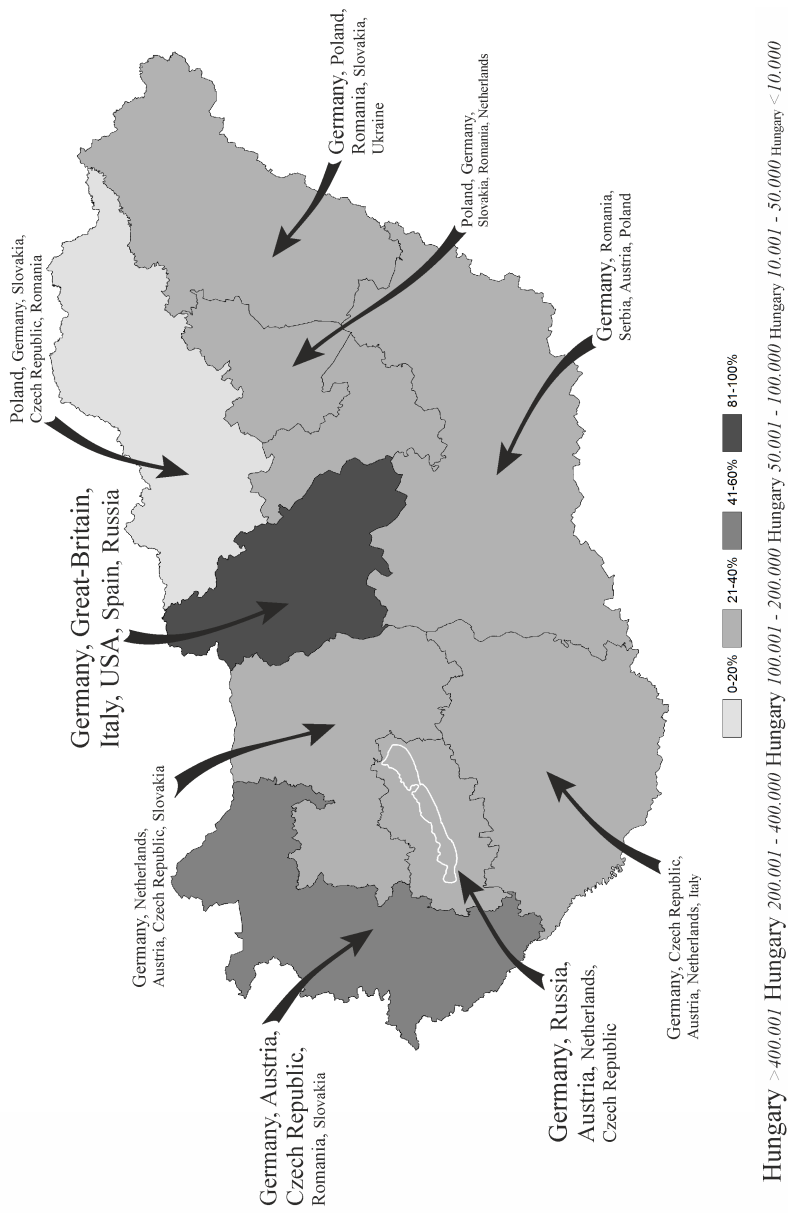


Figure 6 The ratio of foreign guests (%) and the significant sending countries to the tourism regions of Hungary (2012).
Source: Based on CSO/KSH data edited by Józsa (2014)

In the 1990s which can be considered as the era of transition one of the most important processes affecting the supply of tourism was *privatisation*. After the change of the regime some areas of tourism – such as accommodation services, guest catering and travel organisation – seemed to be a fairly popular investment for foreigners taking a significant amount of foreign capital to the country (Behringer et al., 2002).

Table 2 Competitive products of the countries of East-Central Europe to Hungary

Country	Product
Austria	cultural tourism, health tourism, shopping tourism, active tourism
Slovakia	cultural tourism, health tourism, active tourism
Czechia	cultural tourism, health tourism
Ukraine	shopping tourism, active tourism
Poland	cultural tourism
Romania	cultural tourism, rural tourism, active tourism
Serbia	shopping tourism
Croatia	cultural tourism, waterside holidays
Slovenia	cultural tourism, health tourism, active tourism
Bulgaria	waterside holidays

Ed.: Jónás-Berki and Marton (2013)

A greater amount of quality and quantity development started only from the beginning of the 2000s by financing different support programs – EU accession programmes and the national Széchnyi Plan (Aubert and Berki, 2009). With the 2004 accession of Hungary to the EU instead of the domestic sources the community finance came into prominence thus the 1st National Development Plan and the New Hungary Development Plan (later on New Széchenyi Plan).

In the *tourism product development directions* directly connected to the attractions unequivocally the dominance of health tourism can be observed (Aubert, 2011) which is justified by both the national features and also the international and domestic demand trends. This process can well be seen in the ranking change of the most visited settlements of the country. Besides health tourism, a classic direction is the development of cultural tourism which, nevertheless, is less present as primary motivation for travelling, but its spillover effects (forming the country image, uniqueness, effects on the level of the local population) are rather significant. Further valorisation of tourism is promoted by the perception that in the latter era more and more scientists identify it as an economy-developing factor (Rátz, 2006).

In the *accommodation sector* the capacity of commercial accommodations significantly grew and changed in its structure between 1990 and 2011. The number of units nearly tripled – from 927 units in 1990 to 3,000 units by 2011 – while the number of bed capacity grew 1.5 times (from 187,000 to approximately 300,000 bed places) (Kátay, 2012).

In the era tourism became a strategic branch of economy in Hungary which also meant the spatial diffusion of the branch – the number of settlements latching on to tourism grew from 398 (1990) to 731 (2010). While in the Northern Great Plain region the number of hotels and camps, in the regions of Transdanubia the pensions and in other parts of the Great Plains the number of medical hotels and tourist accommodations grew more than the national average (Csordás, 2012).

About the formation of the tourism supply we can say in short that there was a need for both quantity and quality improvement in order to maintain the competitiveness of Hungary's tourism sector. In the area of *attraction development* besides the medical tourism investments with high importance the direction towards culture-based product development dominates which can be a distinctive, image shaping factor well emphasizing Hungary's uniqueness. The accommodation sector also required quality and quantity restructuring which basically run its course in the 2000s. The support sources had an important role in renewing the complete supply and shaping quality products which simultaneously were realised in the mutual symbioses of tourism and regional development. The problems of tourism governance and tourism management propose further, really actual questions (Aubert and Miszler, 1999) which can be considered as of crucial importance in establishing the competitiveness of the destinations and also the country.

6 SUMMARY

The tourism of Hungary went through significant changes in the analysed era which can be divided into two sections: the socialist era and the market economy era and we have to mention the transition period in between the two. In the socialist era the role of tourism was huge in Hungary but concerning the receipts – taking into consideration the ratios – it can be less realised as a success story. The era was mainly characterised by social tourism and in the second half of that age, due to the opening to the West, the leading tourism role in the Eastern Block. After the change of the regime Hungary lost significantly from its traditional foreign tourism demand, in line with the domestic demand decreased. The slow but market based tourism development started only after this period.

Today the major characteristics for Hungary's tourism follow the world trends both on the supply (preferring the higher standard accommodation types, valorisation of experience products, wellness-, cultural-, wine and gastronomy tourism, event tourism and waterside tourism with numerous supplementary products) and the demand side (the appearance of second and third holidays, travelling from winter to summer, the significant increase of the demand for MICE and alternative forms of tourism).

As a consequence of all this we can state that on the one hand Hungarian tourism has been renewed in the last two decades but a proceeding on the world's tourism market can only be achieved by further long term planning and development and the successful cooperation of the actors of the market. About the formation of the

tourism supply we can say in short that there was a need for both quantity and quality improvement in order to maintain the competitiveness of Hungary's tourism sector.

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Špecifické črty cestovného ruchu v regióne strednej a východnej Európy

Resumé

Po roku 1945 sa v krajinách strednej a východnej Európy vytvoril nezvyčajne uzavretý svet, a tak vzťahom v rámci regiónu dominovala nedôvera. Tento stav samozrejme určoval aj úlohu a miesto cestovného ruchu v spoločnosti. Cestovný ruch v tomto regióne mal niektoré spoločné všeobecné charakteristiky s ostatnými krajinami sveta, stredná a východná Európa sa však líšila od ostatných niektorými špecifickými znakmi cestovného ruchu. Veľmi deformovaný bol napr. „business“ cestovný ruch, ktorý bol obmedzený na úroveň medzištátnych vzťahov a zmlúv a bol realizovaný len veľmi malou skupinou ľudí. V podmienkach, ktoré vládli v týchto krajinách pred rokom 1989, sa dalo len ťažko hovoriť o podnikaní v cestovného ruchu, ako ho chápeme dnes.

Cestovný ruch Maďarska prešiel v sledovanom období významnými zmenami. Obdobie po roku 1945 do súčasnosti môže byť rozdelené do dvoch základných častí: socialistickej éry a obdobia trhového hospodárstva, pričom je potrebné zmieniť sa aj o prechodnom období medzi nimi. V období socializmu úloha cestovného ruchu v spoločnosti bola v Maďarsku pomerne významná, ale pokiaľ ide o príjmy, aj s prihliadnutím na vtedajšie pomery, ťažko môže byť toto obdobie hodnotené ako úspešné. Táto éra je charakteristická najmä „sociálnym cestovným ruchom“, pričom v druhej polovici tohto obdobia, v dôsledku určitého otvorenia sa spoločnosti na západ, získal cestovný ruch vo východnom bloku významnejšie pozície v ekonomike. Po zmene režimu v roku 1989 Maďarsko výrazne upustilo z tradičných požiadaviek zahraničného cestovného ruchu, pri súčasnom poklese jeho domácej zložky. Po tomto prechodnom období, už na báze trhu, začal jeho dynamický rozvoj.

Dnes sú hlavné charakteristiky maďarského cestovného ruchu v súlade so svetovými trendmi, ako vo vzťahu k ponuke (vyššie štandardné typy ubytovacích zariadení, valorizácia ponúkaných produktov, Wellness-, kultúrny-, na gastronómiu orientovaný cestovný ruch, „event“ cestovný ruch, cestovný ruch orientovaný na využívanie minerálnych a termálnych vôd, cestovný ruch s početnými doplnkových produktmi a ďalšie), tak aj vo vzťahu k dopytu (požiadavka druhej a tretej dovolenky, cestovanie od zimy do leta, významný nárast dopytu po „MICE“ a alternatívnych formách cestovného ruchu).

V dôsledku vyššie uvedeného môžeme dnes konštatovať, že na jednej strane bol maďarský cestovný ruch v posledných dvoch desaťročiach obnovený, revitalizovaný, ale na druhej strane pre presadenie sa na svetovom trhu cestovného ruchu je potrebné vykonať ešte veľa. Nevyhnutnosťou je ďalšie dlhodobé plánovanie a upriamanie pozornosti na rozvoj dlhodobej úspešnej spolupráce všetkých aktérov trhu. K vytvoreniu ponuky cestovného ruchu môžeme stručne poznamenať, že je potrebné sa zamerať rovnako na kvantitu, ako i kvalitu v kontexte zachovania konkurencieschopnosti cestovného ruchu Maďarska na globálnom trhu.