

# DATOURWAY

The national analysis  
of the territorial tourism strategy

## Hungary



## Position of the DATOURWAY area

The target area in Hungary includes a total of seven riparian counties whose population (including that of Budapest) accounts for 52% of Hungary's overall population on the 37% of the country's territory. The analysis of settlements in the region should initially identify **functional urban areas**.



The conurbation around the capital located on both sides of the middle section of the Danube is a metropolitan area of international importance while Budapest is a national complex functional centre. Transdanubia within the region examined includes three other urban areas of national importance (Győr, Székesfehérvár and Pécs and their surroundings). However, the eastern side, the Great Plain of the Danube Region lacks such areas completely. In rural areas in the southern part of Transdanubia very small villages while on the other side of the Danube separated farms are dominant. A major **development axis** in the Danube region is the Vienna-

Bratislava-Budapest line that is copied by the track of the M1 Motorway. However, this development axis diverts from the Danube below Budapest and exits this region to the south, heading towards Székesfehérvár – Zagreb (M7), Szeged - Belgrade (M5) and Miskolc (M3) in the north. Hungary's main transport corridors (motorways) follow the development axis which means Hungary's western entrance is located along the Danube but its exit is positioned east of the Danube, closer to the Tisza.

Although the M6 Motorway runs parallel to the Danube to the south, it will only rise to higher significance when it has reached Ploče in Croatia. In the Danube Region developments, the connection of M6 to the Vienna-Budapest development axis will have a crucial role where Dunaújváros could be of key importance.

Despite the fact that Hungary's capital, situated on either side of the Danube is the exclusive centre of the country, the Danube running in the middle of the county, continues to divide the country instead of serving as a link, from ancient times. The Danube is not only a natural but also a cultural border, in terms of ethnology and landscape management as well. Difficulties in crossing the river continue **to separate the two sides** even today and the administrative units (the region and the counties) that also follow the line of the Danube (with the exception of Pest county) lead to even stronger division.

Recent motorway constructions increased the number of road connections between the two sides: two new bridges have been added to the existing two south of M0 around Budapest. However, areas on both sides along the south section of the Danube, in particular on the eastern side, (sub-regions of Kunszentmiklós, Kalocsa and Baja) remain internal peripheries.

The **National Tourism Development Strategy's** conclusions regarding the Danube Region conclude that those neighbouring Central European countries which have a similar or better collection of natural and built-up tourist attractions than Hungary and

continue to improve these (Slovakia, the Czech Republic, Poland and Slovenia) are extremely fierce rivals in the tourism industry and are responsible for lower demand. However, regional co-operation with these competitors - as in case of the Visegrád Group – contributes to the stronger and more efficient presentation of this area as a single region.

Hungary's rivers and lakes offer a great potential for water tourism. The navigable length of the Danube totals 412 km within Hungary. Both the use of motor boats and water touring require extensive service infrastructure which is only partly available at present. The international Rhine-Main-Danube canal offers excellent opportunities but the construction of the Gabčíkovo dam led to an immense fall in the traffic of smaller boats badly hitting previously flourishing water tourism. This also had an adverse effect on infrastructure resulting in the shutdown of many ports due to the reduced traffic. Quality services to receive and to attend to water tourists with motor-driven boats are unavailable on Hungary's larger rivers. The bicycle road along the Danube connecting Vienna and Budapest has only been partly built. Foreign tourists travelling by bicycle prefer Slovakia where bicycle roads are more complete and of better quality. Moreover, the adequate cycling services (such as repair services, accommodation, etc.) are also lacking in Hungary.

The **key objective of the National Tourism Development Strategy** is to improve the quality of life through the means of tourism. In order to improve the quality of life and promote long term and sustainable development, a balance must be insured between tourism and its economic, social and natural environment that may be achieved through the realization of the following comprehensive objectives (pillars).

- I. Human-oriented and in the long term profit-making development
- II. Attraction development
- III. Improvement of conditions for tourist reception
- IV. Human resource development
- V. Development of efficient operations

## VI. Horizontal goals

- Development of experience chains
- Sustainability
- Equal opportunities
- Cross-border tourism connections
- Market segments

## Geographical characteristics

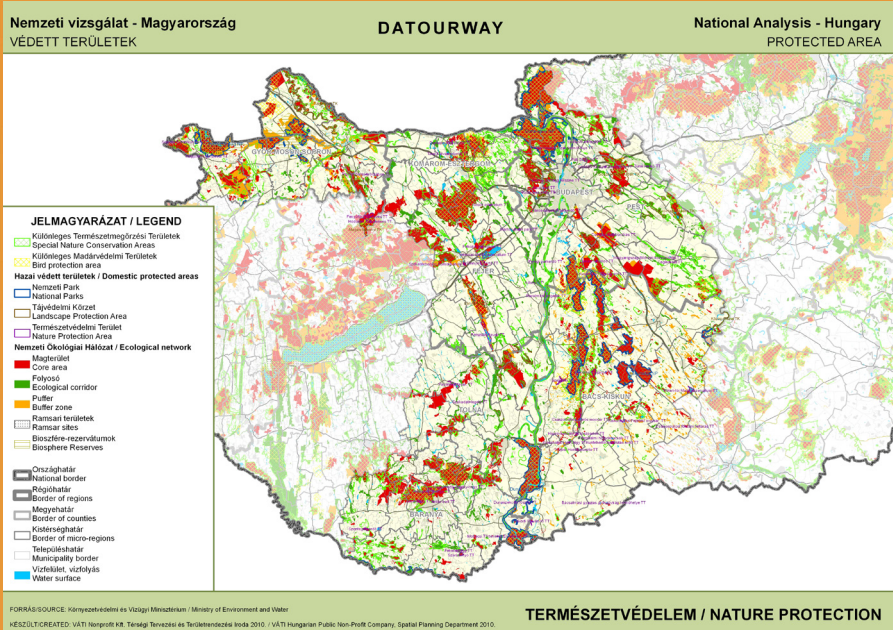
The territory of Hungary as a whole is part of the catchment area of river Danube and lies in its central part. The Danube is therefore essential for the social and economic life of this country.

Owing to its natural resources and economic potentials the DATOURWAY area is of high importance in the national economy. The rich natural resources include minerals, raw material for manufacturing and building industries, surface and sub-surface water reserves. Climate features and their temporal distribution are favourable for agricultural production; there are large areas with excellent conditions for cultivation; the ecological characteristics are suitable for tourism too; the morphology of the terrain offers broad possibilities for land use, industrial and urban development.

The counties along the Danube comprise 6 National Parks, 16 protected landscapes and 61 nature conservation sites. The establishment of a network of forest reserves and relevant research began after 1990. Today the national network comprises 63 forest reserves, 27 of which are in the counties along the Danube.

The network of NATURA 2000 will contribute to sustainable rural development through the increase of rural employment, offer of alternative rearing, promotion of rural tourist attractiveness, markets of bio products and appropriate agro-environmental measures. Several Hungarian examples demonstrate the economic benefits of the protection and management of natural heritage.

The Danube, the largest river in the European Union with abundant habitats on the islands and nets of river branches is a common European asset. In Hungary the section of the Danube is 412 km long, 60 % of the banks are natural and – with the exception of those in the capital city – are components of the European NATURA 2000 network. Between Szap and the southern national border there are altogether 53 islands as well as branches, oxbows. In the counties along the Danube the Ramsari areas – designated for the maintenance of water eco-systems and protected by international agreements – extend to 19 thousand hectares in total. Furthermore there are 3 bio reserves (UNESCO-MAB) too.



Tourism has gradually grown into the most important sector in terms of job-creation, as well as a leading economic sector with a growth rate exceeding that of the global economy. Tourism can provide a future for economic development for a country, a region, a town or a village. The World Tourism Organisation (WTO) forecasts that the contribution of tourism revenues to the GDP will rise from 10% today to 13% in 2020 (with tourist arrivals rising threefold). At

the same time, it must be born in mind that the number and length of stay of tourists in Hungary saw a continuous decline in the past 20 years, and the recent economic recession domestic tourism has also come to a halt. Tourism accounts for 8.76% of domestic GDP and provides 328 thousand jobs, plays an extremely significant role in improving the balance of foreign trade, facilitates the exhaustion of local potential and restoring regional imbalances, while having a positive impact on the quality of life.



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

areas, that is destinations (tourists' travel destinations) is a precondition of recreating the Hungarian tourism sector as a sustainable and compatible industry.

Due to its vicinity to the border, as well as its situation in terms of transportation geography and spatial structure, **Győr-Moson-Sopron county** serves as a gate with respect to tourism arriving to Hungary from the West. As a result, there is a significant amount of transit and shopping tourism, though the latter is experiencing a gradual decline.

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

Due to its vicinity to the border **Komárom-Esztergom county** is a link between South Slovakia, the Northern part of West Transdanubia and the Pilis and the Danube Bend areas of Budapest's agglomeration. There is a significant transit traffic on the M1 motorway towards the East-West directions. The Danube area used to be part of what was once a coherent industrial axis of Hungary but is by now more sporadic in terms of industrial activity. Nevertheless, environmental burden is very high in this area up to this date. Other parts (Vértes, Gerecse premountains) of the county



have also been industrialised and urbanised to a great degree, with a serious level of environmental burden in several areas. The priority tourism types in these areas should be those – softer, gentler and therefore greener – aspects that will sustain the ever more vulnerable natural values of the target areas on the long-run. Consequently, the tourism industry has not invaded the Danube area – the only places with more significant tourism presence are around the Danube Bend area (Esztergom, Dömös). The natural landscapes (e.g.: Danube Bend, Gerecse, Vértes, Bakonyalja) and cultural and church-related values of the county are excellent potential appeals for tourism.

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

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

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

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

Despite the high level of guest traffic, length of stay is below the national average but the region accounts for the highest rate of accommodation utilisation capacity in the country. Shorter length of stay is all the less obvious because the most popular international cultural and sports events take place in Budapest (Spring Festival, Formula-1, European- and World Championships, etc.) and the Budapest International Fair also attracts huge masses of people. Higher-scale developments are now being realised outside of Budapest as well.

**Fejér county** is one of the most developed counties in Hungary with a central location, a diverse natural environment, a rich palette of beautiful cultural values and a relatively well-developed

infrastructure. At the same time, tourism could go a long way in resolving or easing existing problems and could contribute to the implementation of the overall development objectives of the county. The county is easily accessible by every means of transport, the overall transportation network can be considered good (although road density falls short of the EU average). The M6 and M8 dual carriageway roads and the new Danube-bridge strengthen both horizontal and vertical connections in national as well as international terms (with Austria, Slovenia and Croatia). Both Lake Velence and the Danube provide favourable opportunities for waterside holidays, water sports and angling. Sárvíz and the inner lakes are also excellent places for the latter activity. The Northern and – to a smaller extent – Southern parts of the county as well as the Sárvíz valley connecting the two accommodate a substantial amount of landscape in nature-like condition that would provide good potential material for the development of eco-tourism.

The population is well-known for their hospitability and openness in participating in the tourism industry are the most important assurances that tourism development efforts will be appreciated. Typical features of tourism activity in Fejér county are: excursions, sightseeing tours and an extremely strong seasonality factor.

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

The county's attractions spring mainly from its **natural values**.



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

**Tolna county** lies where the Alföld (Great Plain) and the Transdanubian Hills meet, it is one of the smallest counties in Hungary. The economy of the county is dominated by the three

biggest towns – Dombóvár, Paks and Szekszárd – which lie in three different corners of the county. Paks and Szekszárd play an important role in a densely populated part of the county along the Danube River, and due to the bridge across the river at Szekszárd, this impact is felt in the Great Plain too.

The main tourist attractions of Tolna county are the Germency-Gyulaj wildlife reserve within the Danube-Dráva National Park and the fishing sites in the oxbows of the Danube. The natural assets in the region are partly a basis for developing eco-tourism and partly



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

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

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

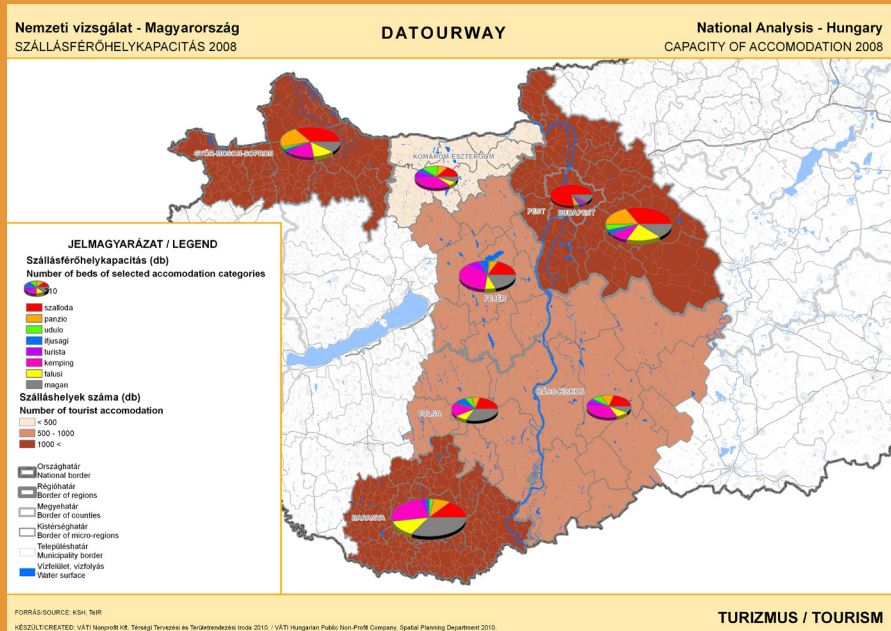
In tourism the main contours of the county are given by Pécs (Cultural Capital of Europe in 2010) and Harkány, which have the

highest number of guest nights and represent 44.2% and 26% of the county's tourism respectively. Thus these two destinations handle two-thirds of tourism directed to the county.

## The structure of accommodation

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

The **number of available accommodation** in the Danube counties comes close to 140 thousand, which represents a share of 26 % of all the available accommodation in the country. Regional distribution of available accommodation per 1000 inhabitants is as follows:



Baranya with 61 places available, Győr-Moson-Sopron with 35, Komárom-Esztergom with 34 and Tolna county with 33 places have the most favourable indicators. These figures compare with the national average of 53 and the Danube area average of 26. The number of available accommodation in Pest county (9 places) is the worst in the area because of its high population density the capacity per 1000 inhabitants.

The breakdown by types of available accommodation shows that 24% of accommodation in the Danube area belong to the category of are private lodgings. More than half of commercial accommodation, which represents 76% of all accommodation, is provided by hotels, mainly because of their great number in the capital city, although their proportion is also considerable in Pest and Győr-Moson-Sopron counties. However, the number of hotel accommodation is low in Komárom-Esztergom, Fejér, Bács-Kiskun and Baranya county. In the commercial accommodation category the camp sites represent over 21%, their proportion is rather high in Fejér, Komárom-Esztergom and Baranya county.

In 2008 the **number of guests** visiting the Danube area exceeded 4 200 thousand, a figure which amounts to some 50% of all guests coming to the country. It is important to highlight that Budapest was responsible for over 60% of this figure. The proportion of foreign guests in the Danube area is 63%, but this can be clearly attributable to the capital city. Excluding Budapest this value is only 29%.

The number of guest nights in proportion to the number of guests enables us to come to a conclusion regarding the **average duration of stay** of the guests. It is 2.5 days in the Danube area, which lags somewhat behind the national average (3.1 days). This short duration of stay is characteristic of weekend tourism, which is something that accommodation providers increasingly introduce into their marketing strategy in the form of special promotions for weekends and holiday packages. In terms of regional distribution no real difference can be discerned, only Baranya county reaches



the national value, where even foreign guests spend more days on the average (4.9 days) than in the rest of the area.

## **SWOT**

### **Strengths**

- Prosperous area of high social and entrepreneurial potentials
- Special and effective adjustment and survival strategies
- Extensive municipal co-operation at domestic and international levels
- The Danube and its system of branches and islands, oxbows, waters as well as the richness of their habitats
- Large mountain forests, scenic areas for rambles
- The Danube Bend as a traditional tourist destination
- Strategic water resources, rich thermal assets
- Mosaic-like land-use and diverse landscape structure
- World-famous stock of big game
- Urban centres rich in cultural heritage sites
- Diverse cultural traditions (ancient trades, gastronomy, ethnic folklore)
- Large number of traditional wine districts
- Well-known (international) farms
- Diverse regional products (berries, paprika etc.)
- The nearness of Budapest as a tourist market
- Good accessibility of the services provided in Budapest
- The Danube is Europe's most significant waterway, as well as a Trans-European transport corridor, developing network of ports
- The availability of transport lines parallel with the Danube
- Advanced conditions for air transport, small airports

### **Weaknesses**

- Area of low profitability and low capacity to retain the population (southern micro-regions)

- Shortcomings of education and training (South)
- No command of languages in the rural areas
- Unrecultivated and inadequately used quarry lakes
- Damaged landscape of abandoned raw material deposits
- Water quality problems, polluted river beaches
- Strips of industrial sites linked together along the banks of the Danube
- Inorderly and crowded recreational areas with holiday homes linked together
- Congestion, air and noise pollution at the access roads to Budapest
- The danger of flooding in a large area despite the flood protection works due to growing extremities



- Salient anthropogenic environmental loads
- Contradictions of the demand for freight shipping and ecological and tourist requirements
- Lack of lead products in tourism and image
- Insufficient level of high-quality accommodations

- Bad information supply
- Areas with inadequate services, low level of entrepreneurial activities
- The absence of complex tourist programme packages
- Under-utilised tourist potential
- Compared to the demand, there are few ports built for tourism purposes
- The absence of a contiguous cycle network
- Shortcomings of crossing facilities
- Underdeveloped suburban communal transport
- The deficiencies and inferior quality of roads between settlements, in the inner and outer administrative areas of settlements
- Radial rail network centred around Budapest
- Many communities with no sewage system
- Areas underdeveloped in transport



## Opportunities

- Support for SMEs
- National and international co-operations, local networks linked to the river
- Strengthening the civil society
- Establishing a development area adjusting to the ecological borders of the Danube
- Increased appreciation of the environmental and natural assets
- The international value of the green corridor system of

the Danube

- Increased appreciation of the local characteristic features and traditions
- Improving domestic tourism (holiday vouchers, multiple journeys)
- Growing demand for water tourism and related forms of tourism
- Improved accessibility of underdeveloped areas in terms of transport
- Spread of the electronic forms of the access to information
- The motorway network is being built continuously

### Threats

- Frequent occurrence of extreme weather conditions due to climate change;
- Increased water and air pollutions (domestic and cross-border),
- Development plans disregarding social, economic and environmental correlations;
- The prominence of navigation interests over ecological considerations;
- Overloading and overdevelopment in sensitive areas, growing urbanisational environmental noxiousness,
- Damage to valuable strategic water resources,
- Tourist traffic (local solvent demand and foreign demand) is declining or being further concentrated;
- Absence of the national representation of local interests, less civil control;
- Absence of co-ordinated, destination-oriented tourism development

### Conflict areas

#### Tourism – environment

Out of all human activities, it is tourism that applies the strictest requirements toward **the status of environment**. However, different sorts of tourism have different criteria ranging from the highest

standards of health and eco-tourism to most moderate demands of culturally driven city visits. Conflict areas were identified having regard to the following elements: visual pollutions, environmental pressures and environmental threats, as well as environmentally sensitive areas that limit traffic.

In the Hungarian section of the Danube significant anthropogenic effects are typical:

- On the bank of the Danube, in the region of Komárom, Esztergom, Vác, Budapest, Budaörs and Dunaújváros it is the uninterrupted row of industrial plants, whereas in the Esztergom and Szentendre sub-regions, it is the abandoned mine-fields that restrict tourism with their visual pollution.
- Further growth of traffic may cause further air pollution problems to areas that are already burdened with busy road traffic, polluting factories and the concentration of city traffic.
- The waste water problems in Esztergom, Budapest and Dunaújváros, as well as the lack of sewers in the Szob and Vác sub-regions limits the recreational utilization of surface waters and the long term protection of underground water bases.
- Another environmental threat in lower level areas (the Győr and Komárom sub-regions; Szentendre Island; Római Bank, Dockyard Island and Margaret Island in Budapest, the Ráckeve sub-region and parts of the Ercsi and Adony sub-regions) is the possibility of flood. Although the configuration of the flood prevention works is adequate in general and missing sections are to be developed in the near future, climate change may cause unexpected, and in many cases unpreventable flood events. Therefore, development projects for these areas must always take into consideration existing environmental risk. At high banks – in the Danube Bend and on the right side bank – potential slide of the river walls limit a riverside building opportunities.
- The water bases and water quality protection areas in the Danube Bend and under Budapest present further obstacles to tourism-related developments just like the large, environmentally

sensitive areas in the Gerecse Mountains and in the Danube Bend that limit the capacity of the region.

The areas south of Dunaújváros are primarily defined by natural factors:

- Apart from air pollution in Baja and Szekszárd, it is the low penetration of sewers that present the highest environmental risk.
- The risk of flood is high in low level areas, although the configuration of flood prevention works is adequate in the region. Still, the trend of increasingly higher flood waves presents a threat. There are unsafe sections in high banks, too.
- The southern section of the Danube consists mostly of environmentally sensitive areas. The main risk factor is water bases and water quality protection areas but there are also substantial stretches of environmentally sensitive areas in the region.



### **Tourism – human resources**

Social barriers are primarily represented by a relatively low level of entrepreneurial activity and low participation in tenders. This is partly explained by demographic reasons as well as by a certain degree of economic instability (outward migration, ageing and a shortage of own resources). In view of these factors the following

description applies to the area.

In areas of low economic activity there are only a few businesses offering catering and accommodation that have the necessary human resources to provide an adequate level of service to visitors. In addition to meeting the criteria for launching a new business, those who are active in the tourism sector should also be well prepared, well informed and should possess the necessary professional knowledge and communication skills.

The combined presence of these three factors is most characteristic of communities in Baranya county. Some parts of Tolna and Bács-Kiskun counties are also problematic as regards the level of entrepreneurial activity. In other counties there are sporadic indications of low entrepreneurial potential, mainly on the peripheries.

Closeness to nature, traditional, healthy lifestyle and environment, and the joint potential of artisanry, craftsmanship and gastronomic services are important advantages of rural areas, and are increasingly sought after in domestic tourism as well as tourism in general. The demand and capacity for new business start-ups and participation in tenders building on these advantages must be promoted within the region.

### **Tourism – infrastructure**

Expectations of tourists with regard to the accessibility of destinations can be rather differentiated and even contradicting: on one hand – especially for short trips – there is a requirement for reaching the destination with no time-loss, while travel time is relatively indifferent in the case of longer holidays, and on the other hand, in many cases there is also a preference for areas closed off from traffic. The offer of other institutions destined to serve visitors match the local level of development. The following section gives a territorial description.

Tourism-related infrastructure is not satisfactory in areas where

accommodation capacities are low and there are only a few catering and retail facilities. Access to an acceptable range of such services of an adequate standard is an essential prerequisite of tourism development, especially for the utilisation of attractions offered by nature, culture and the built environment and for turning the given region into a well-managed destination. The Danube area has diverse tourist attractions, the most important of these being the natural assets linked to the still existing oxbows and other riparian sites, the rich cultural heritage, built environment and event calendar, as well as traditional local products and folklore. There is strong demand for infrastructural development and marketing management in areas that are rich in tourist attractions. In order to be able to launch capital-intensive investments in these areas, the operative burdens of small enterprises would have to be eased in addition to intensifying tendering activity and strengthening cooperation. The supply in accommodation services is weakest in the communities along the middle and lower stretches of the Danube, while catering and retail services are missing mostly in communities lying farther from the banks of the Danube. The most striking areas of conflict are certain areas along the Danube River that are rich in attractions, but lack tourism infrastructure, namely the area around the Danube Bend – excluding big towns - and small communities of the Upper Danube section, and the communities situated on the wide stretches of the sparsely populated Middle and Lower Danube section.