

The State of Spa Tourism in the South Transdanubian Region in the 21st century

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Abstract

Health tourism is not only one of the most visibly and rapidly developing sub-branches of domestic tourism; it is currently one of the world's most innovative business sectors. Within the tourism sector the development of health tourism can significantly enhance the number of guest-nights and the actual spending of guests. The South Transdanubian Region has a good potential considering health-tourism, still during the last period it was lagging behind the country's other regions. There were no major developments in the area, and the realised ones were not coordinated, thus there was no considerable improvement, despite the growing attractiveness due to the developments in the case of some spas. The majority of the spas have gone through various developments, enlargements or reconstructions during the past ten years, besides there are establishments that welcome their guests with a completely renewed profile. However, this resulted in a divergent offer related to certain establishments: the newly developed services coexist with other services and parts of the complex that have not been updated for decades. Spa and thermal tourism has a primary position in the strategy of developing tourism in this region. The European Union gives financial support for development of accommodations and baths.

Key words: health tourism, development, innovation

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Introduction

Health tourism is not only one of most visibly and rapidly developing sub-branches of domestic tourism; it is currently one of the world's most innovative business sectors. Within the tourism sector the development of health tourism can significantly enhance the number of guest-nights and the actual spending of guests. One reason is that the demand shows much less seasonal fluctuation compared to that for general tourism. Consequently, the development of health tourism could be a useful contribution in countering the imbalances in domestic tourism shown in terms of space and time.

Health-tourism in the South Transdanubian Region

The region is rich in thermal- and medicinal waters. Owing to this advantage/capacity there is a wide range of water-based services in the health tourism. At the same time the capacity in the majority of the baths is low, and they only meet the local demands, thus their potential for tourists is not significant. There are no wellness baths in the region to be found with big capacity and high quality services. However, the composition of medicinal water is unique in Europe, which is an attractive force on the international level. This fact, and the qualitative developments have made the thermal bath of Harkány famous in the past few years. The medicinal and wellness hotels belonging to the baths are products of the health tourism as well, of which there are major ones in Siófok and in Harkány. A four stars hotel can be found in Siófok and a four stars country-seat with wellness and spa services can be found in Bikal and in Hőgyész as well.

It is possible that the Cave of Abaliget will have a significant role in the health tourism due to its air and climate, which are able to treat disorders of the respiratory organs.

To sum it up, the products and services of the health tourism in the region do not meet the required international and national expectations:

- There is an oversupply of smaller medium class baths, but they only have a local role. There is a low offer of profitable services therefore making their maintenance very difficult for the owning local governments.
- Although the bath of Harkány manages remarkable tourist traffic, the absence of family resort services can be an obstacle for further development.
- The capacity constraint of baths of higher quality generates crowdedness at the expense of the quality of the services. At the same time there is no possibility for enlargement because of the buildings' poor placement. In addition the lack of differentiation generates competition instead of developing complexity in the region.
- The significant investments are postponed due to the financial situation of the local governments and because of the difficulty in having an external working capital. The current oversupply is a serious problem, thus it would be necessary to launch new variety of services and supply elements which are more profitable. There is a demand to establish a thermal- and aquapark with a large capacity in the region. However, during its planning it is essential to distinguish it from the other aquaparks of the country (e.g. regarding its themes). [1]

Table1: More significant development of spas between 2000-2008

Year	More significant development of spas between 2000-2008		
2000			
2001			
2002			
2003	<u>Indoor spa in Igal</u>	<u>Development in Harkány</u>	<u>Handing over of spa in Marcali</u>
2004	<u>Indoor spa in Dombóvár</u>	<u>Handing over of Sikonda Wellness Hotel*** and Spa</u>	
2005			
2006	<u>Handing over of outdoor aquapark in Kaposvar</u>	<u>Handing over of spa in Barcs</u>	<u>Renovation in Nagyatad Spa</u>
2007	<u>Handing over of Spa in Szigetvár</u>	<u>Handing over of thermal bath in Mohács</u>	

Source: own collection, edited: by Gábor Klesch, 2009.

The greatest problem is in the region that the number of guests of spas is not increase in spite of how many spas were built between 2000-2008.

Table1: Developments of baths in the Region in the future

Developments of baths in the Region

Baths	Cost of investment	Time of handing over
Barcs	0,44 million €	December 2009
Harkány	4,07 million €	2011
Kaposvár	13,7 million €	October 2010
Tamási	5,59 million €	End of 2010
Nagybajom	7,4 million €	Summer 2011
Siklós	8,8 million €	Spring 2010
Dombóvár	4,88 million €	2011
Magyarhertelend	0,55 million €	Autumn 2009
altogether:	About 40,55 million €	

Source: own collection, edited: by Gábor Klesch, 2009.

The South Transdanubian Spa and Thermal Tourism Competence Centre as a regional innovation-oriented organisation

The organisation was established in March 2007 by the South Transdanubian Spa and Thermal Bath Association. In this way the South Transdanubian region has been strengthened by a Transfer Institution which is able to appraise and involve the stakeholders in the region. This, first of all, means spas, thermal-baths and closely-related enterprises. The aim was to create a centre with the ability to develop and facilitate the efficiency of coordination by means of a variety of projects involving such establishments together with research-centres, researcher-developers, and universities. Nowadays the innovation is a very important thing in the tourism

The Competence Centre has specific goals:

- To increase the competitiveness of the region's spa and thermal tourism by:
 - repositioning service-providers in the market,
 - introducing and developing products and services which enhance economic efficiency,
 - improving the commercial effectiveness of institutions
 - stimulating and adopting innovation-oriented thinking;
- To maintain an ongoing discussion among the enterprises directly affiliated with spa and thermal tourism
- To achieve sustainable cluster-based economic development in health tourism
- To raise significantly long-term domestic and foreign visitor numbers.

Analysis of four typical medical spas in the Region

**Table 2: Statistical data from 4 medicinal spa resorts in South Transdanubia:
Harkány (1); Csokonyavisonta (2); Igal (3); Nagyatád (4); [3]**

Year	Average Length of Visitors' Stay (day)				Available Bed-Places per 1,000 Inhabitants (bed-place)				Number of Guests (person)			
	1	2	3	4	1	2	3	4	1	2	3	4
2004	4.31	7.76	4.08	4.65	2,897	406	121	556	57,383	2,994	3,408	5,087
2005	4.17	7.76	4.42	4.42	1,499	367	128	472	58,046	2,586	2,529	4,881
2006	4.14	6.59	3.4	4.41	2,647	537	122	380	73,778	2,689	2,719	4,760
2007	3.87	5.7	3.65	3	2,997	503	116	503	75,417	3,602	3,219	5,907

Source: Hungarian Central Statistical Office. Edited: by Gábor Klesch, 2009.

The number of bed-nights per capita for Csokonyavisonta leads the group of four with an average of between 6 and 7. Compared to this, the average of the other thermal baths is around 4 nights. In the case of Csokonyavisonta, this is due to the large number of foreign guests, mostly German, who spend an average of one week in the vicinity of the spa.

Harkány leads in terms of accommodation (quantity of public and private accommodation per thousand of the resident population) which is close to 3,000. The latter figure, however, is not constant and varies. In Igal, however, no similar, large-scale accommodation developments have taken place as yet and so this value is very low (about 120 bed-places per 1000 residents). In turn, there is no significant difference between the values for Nagyatád and Csokonyavisonta.

Regarding the number of guests staying in public and private accommodation, Harkány also leads with an increase of almost 30% from 2004 to 2007, the actual number of guests growing from 57,383 to 75,417. It is very interesting that the figures for Igal and Csokonyavisonta show a similar change.

The three Somogy County medicinal spa resorts, as a counter pole to the dynamically developing South Baranya and Southern Shore of Lake Balaton, can lower the spatial concentration of tourism by means of improving the health tourism sector.

Clusterisation in the South Transdanubian Region

Due to its international success more and more sectors tend to clusterisation in Hungary. The New Hungary Development Plan supports the development of clusters on more levels, from the starting through the developing to the accredited pole ones. The tourism enterprises and services standing alone and concurring with each other cannot achieve as sufficient results in Hungary nor on the international market as the cooperating networks of organizations that have a coordinated tourism supply and unified design, and share common marketing and information systems. The trust-based networks can help small enterprises to utilize the special resources through sharing the knowledge. The spas have in this region a idea, that they will be a health-cluster, so they can utilize the advantage of cluster. The innovation-oriented South Transdanubian Spa and Thermal Tourism Competence Centre can help in this.

Conclusions

In 2008, according to the Hungarian Central Statistics Office (KSH) 11 percent of tourists were “health tourists” and 31% of the turnover of hotels arose from health and wellness hotels [6]. In addition, the revenue earned from foreign guests developed very dynamically. In 2008, 13.5% of foreign guests, as well as 25% of domestic, used the services of health and wellness hotels, whilst the number of available beds increased by almost 5% (27% in July) compared to the same period in 2007.

The basic conclusion of this review of tourism as a factor in improving the economic potential of South Transdanubia is that a much higher level of competitiveness could be achieved, given the current potential of spa tourism, although support from funds allocated to tourism infrastructural development remains necessary.

References

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