

ASSESSMENT OF THE TOURISM SECTOR IN A HUNGARIAN SPA TOWN: A CASE-STUDY OF HAJDÚSZOBOSZLÓ

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Abstract: Health tourism is defined as a tourism product of strategic importance in Hungary and spa towns are among the most visited destinations in the country. The aims of the present research are to explore the characteristics of the tourism sector in the spa town of Hajdúszoboszló, and to identify the trends having shaped its tourism in the previous decade. Time-series analysis of secondary tourism data as well as a questionnaire survey among visitors were conducted to assess the market position of the spa town. The results imply that both the well-balanced ratio of domestic and international guests and the diversity of international source markets were favourable for the town. In the future, the more efficient diversification of tourism products, the improvement of the MICE sector, and the development of gastronomic, cultural and sport tourism products are recommended.

Key words: spa town, destination management, Eastern Hungary, pandemic, sustainability

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INTRODUCTION

Hajdúszoboszló is a well-known spa town on the Great Plains, which has been among the most visited tourism destinations in Hungary for years according to the number of tourists and tourist nights. The town is located on the Northern Great Plain, in Hajdú-Bihar County, about 20 km from Debrecen, the second biggest city of the country. Although its population hardly exceeds 24,000 (Népesség, 2020), it has more to offer in many ways than other Hungarian towns of this scale. The main reason for this is the thermal spa and the well-developed tourism sector. The economy of the town is primarily based on tourism and the related sectors including retail, hospitality and other services. The major aim of our research was to explore the major characteristics of the tourism sector in the spa town of Hajdúszoboszló, with special emphasis on the supply and demand side of the tourism market. Furthermore, we aim to identify the key source markets and investigate the adequacy of the target market segmentation in the last ten years until the onset of the pandemic.

In order to get a deeper understanding of the demand side, a questionnaire survey was also conducted to assess guests' satisfaction with Hajdúszoboszló's tourism supply in the second year of the pandemic. This last aspect is of decisive importance considering that signs of overtourism were observed in the town before the pandemic, which may also affect tourists' satisfaction. In a previous study we concluded that the local residents already perceived the negative effects of the large number of tourists visiting the town (Szöllős-Tóth and Vargáné Csobán, 2021). However, empirical research

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concerning tourists' opinions has not been conducted before. Finally, we also seek to contribute to the literature dealing with tourism perspectives in Hungarian spa towns, and to provide practical guidance to local decision makers and service providers regarding the identification of target markets and the development of tourist attractions.

The significance of health tourism

Healthy lifestyle, physical, intellectual and mental wellbeing, and health-conscious living became important trends in the last 20 years, which greatly contributed to the rapid development of health tourism (Hall, 2003). Demographic changes, such as an aging society in the Western world and increasing life expectancy have resulted in an increased interest in health tourism services that may help people remain healthy and maintain a good quality of life (Cooper, 2009). The ever-faster pace of life is a serious source of stress, which may lead to mental and physical diseases. In order to prevent or manage these, many people decide to spend a few days, weeks or even months away from their homes. The philosophy of individualism in the Western world also fuels people's will to devote time to wellbeing (Voigt, 2014).

"Health tourists" are primarily motivated by the wish to improve or maintain their health, to manage or prevent diseases, and to engage in physical and mental recreational activities (Rátz, 2001). Accordingly, health tourism is usually divided into two sub-segments: medical tourism and wellness tourism (Smith and Puczkó, 2010). Medical tourism refers to visiting a health resort or a treatment facility away from home with the aim to recover. It includes clinical and surgical tourism that may involve medical operations as well. Wellness tourists seek to maintain their health and prevent illnesses by spending time in a relaxing or entertaining environment. Medical wellness refers to a combination of wellness services and medical treatments (Ruszinkó and Donka, 2019).

Health tourism destinations are locations that are chosen by people whose motivation is to improve their health and/or well-being (Tuominen et al., 2017). The development of medical tourism is often considered a priority in towns with natural conditions such as thermal water, healing mud or healing climate. On the other hand, the global climate change is not a major factor affecting indoor spas (Hoyk and Palkovics, 2022). It is worth noting that the natural environment itself may have positive therapeutic effects (Deery et al., 2014; Dryglas and Salamaga, 2018). Healthy environment in the countryside may offer an excellent opportunity to practice health-conscious lifestyle and to engage in recreational activities. However, the availability of such natural resources is not a prerequisite for the development of wellness services, as a purpose-built, well-functioning infrastructure may be sufficient for developing wellness tourism.

Due to the presence of unique natural therapeutic features, high-quality and constantly improving infrastructure, as well as its rich cultural traditions, health tourism has outstanding potential in Hungary. Since the early 2000s, Hungary has made tremendous efforts to develop spas and tourist accommodation, relying on government and EU development funds (Michalkó et al., 2011). The *National Tourism Development Strategy 2030 – Tourism 2.0* defines health tourism as a tourism product of strategic importance both in the domestic and the international market (NTS 2030 – Turizmus 2.0, 2021). Tourism development also has a great potential in the improvement of cross-border cooperations (Bujdosó et al., 2011; Dávid et al., 2011). The importance of health tourism development is also underpinned by its economic and social benefits. Health tourists are typically high spenders, as they make use of more and more exclusive services than other travellers. Also, demand in this segment is distributed more evenly over time, which implies that service providers have to experience seasonality to a lesser extent (Rátz, 2001; Laczkó, 2015). Seasonality is defined as one of the most important factors influencing tourist activities in spa towns (Stupariu and Morar, 2018). As for wellness tourism, it attracts not only senior tourists but also members of the Generation X and Y. In Hungary Generation Y are the most enthusiastic about wellness services, as well as physical and mental recreation, and they are the ones who are more open to a health-conscious lifestyle, as well (Ivancsóné Horváth and Printz-Markó, 2017). This may have important implications for the future marketing strategy of Hajdúszoboszló, as it may serve as a guidance for defining new target markets.

At the same time, the constantly changing economic, social and technological environment poses new challenges for decision makers involved in destination management (Egri and Kőszegi, 2020). In particular, the anticipation and monitoring of changes in demand is a difficult and complex task. The commitment of local decision makers to the principles and practices of sustainable development is very important, because the decisions they make may affect the tourism sector, too (Bauerné Gáthy and Vargáné Csobán, 2009). Sensitive natural environments, which often characterize spa towns require careful planning and long-term monitoring of tourism's impacts (Dávid et al., 2008, Dávid et al., 2012). Endangerment of the natural environment, e.g. certain species of flora due to the lack of adequate management of the resources was detected in the area of a thermal spa (Ilieş et al., 2015). Diversified services have appeared in areas related to mass tourism as well, therefore competition has increased on the health tourism market (Csapó and Töröcsik, 2020).

Even less well-known destinations offer a wide range of recreational physical activities to their residents and tourists alike (Vargáné Csobán and Serra, 2014). The promotion of a health-conscious attitude and health tourism services may open up new markets (Printz-Markó et al., 2017). In particular, information on wellness services and health tourism should be more actively disseminated among young people, which may have an impact on their travel decisions (Ivancsóné Horváth and Printz-Markó, 2018). Marketing tools such as "influencer marketing" are well adaptable for affecting target markets (Yetimoglu and Ugurlu, 2021). Similarly to other tourism products, consumers increasingly search for unique and authentic experience in health tourism. In order to remain competitive, the supply side must meet these expectations.

The fierce competition among European spa towns makes it necessary to adopt and strengthen a market-oriented approach, get a deep understanding of the demands of customers, and apply a well-founded target market segmentation (Hallab et al., 2003). Integrated marketing can be an appropriate direction not only for service providers, but for destinations as well, as this holistic approach puts customers in the focus and strives to explore new market niches (Ugurlu, 2021). This also applies to the domestic market of health tourism, because the significant increase in capacity

has not been followed by growth in demand, and in light of the administrative measures related to the pandemic, it is not clear which new target groups may best represent the demand side for spas and spa towns in the future. Therefore, the major aim of the present study is to investigate the efficiency of the target market segmentation in the last ten years until the coronavirus pandemic as well as to identify the key source markets for the next decades.

MATERIAL AND METHODS

In the past decades, Hajdúszoboszló has become one of the most developed and top visited health tourism destinations of Hungary (Jónás-Berki et al., 2014; KSH, 2018; KSH, 2021). Our research tries to explore the touristic characteristics of the spa town of Hajdúszoboszló. To do so, we first determined the objectives of the research, we did a literature review, analyzed secondary data, built up a questionnaire to gain primary data. After finalizing the data analysis, we drew our conclusions and proposed our recommendations related to the topic (Figure 1).

In the framework of our research, we carried out secondary data analysis of time-series tourism data collected over the last ten years (Dwyer et al., 2012). We used the statistical database of the Municipality of Hajdúszoboszló, which is available at the official website of Hajdúszoboszló. Furthermore, the Tourism Destination Management (TDM) organisation of the town provided the missing data and information. In addition to secondary data analysis, we applied participant observations, and a questionnaire survey was also conducted among those guests who spent at least one night in Hajdúszoboszló in the past 5 years. The primary research was performed online, during the autumn of 2021, using social media websites operated by the TDM organisation. The primary aim of the survey was to get an insight into the tourists' opinions and assess the satisfaction level of the guests. We used descriptive statistical methods for data analysis.

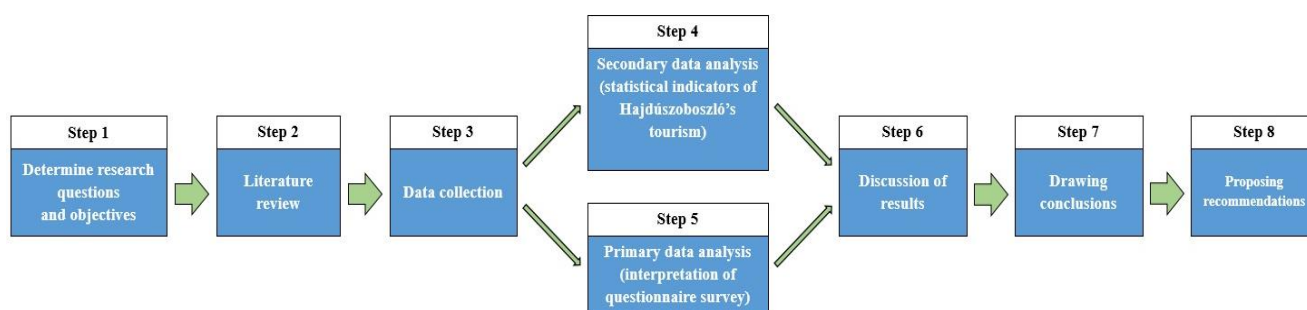


Figure 1. Methodology flowchart (Source: Authors' own compilation, 2021)

RESULTS AND DISCUSSION

The tourist attractions of Hajdúszoboszló

Hajdúszoboszló has been a certified health resort since 1958, and one of the best-known and most visited health tourism destinations in Hungary for decades. Hajdúszoboszló's major attraction is the Hungarospa spa complex, which has become famous for its thermal water. In 1925, following research carried out by geologist Ferenc Pávai Vajna, 73 °C hot water burst to the surface from a depth of 1091 m at an oil drilling site, along with natural gas. It was a discovery that converted Hajdúszoboszló into one of the major health tourism destinations in Hungary. The thermal water of Hajdúszoboszló contains hydrogen carbonate, iodine, bromine and sodium chloride, and is rich in calcium, magnesium and metaboric acid (Gömör and Oláh, 2016). Bath treatment is recommended mainly for rheumatic diseases, but the thermal water is also drinkable for therapeutic purposes. The spa offers more than 40 treatments to visitors, including massage, mud treatment, weight bath, underwater massage, underwater gymnastics, various electrotherapy and state-of-the-art soft laser treatments. The individual treatments are combined into therapeutic programmes that may last for 7, 14 or 21 days.

Four out of the 15 pools of the complex next to the indoor spa are available throughout the year, the rest operate only in the summer season. One of the most popular parts of the facility is the Mediterranean beach. With a surface area of 6,200 sqm, this is the biggest pool in Central Europe. Visitors also enjoy the slide park with its 15 slides, which opened in 2000. In 2021 "Premium Zone", the newest open-air wellness pool opened within the bath complex, which is available to the visitors for an extra charge. The facility covers 2.5 ha with a total water surface area exceeding 2,500 sqm, and a visitor capacity of 1,000 persons at any given time. The town provides a wide range of cultural attractions and programmes. There are parks and playgrounds for leisure activities in the city centre, and an open-air stage is also available with various programmes next to the spa. Small museums and exhibitions with local significance (e.g. history of the town, folk art, and fine art) also await guests. The Cultural Centre of the town offers concerts and theatrical performances on a regular basis. The culinary events like the BBQ and Beer Festival and the Biofood and Wine Festival are also worth visiting. The farmers' market is a perfect place for tourists to get an insight into regional cuisine and buy local products.

Hajdúszoboszló has a vibrant sports life with numerous athletic clubs operating in the town. Tourists can engage in various sports activities, including tennis, football, jogging on a tartan running track, swimming in the indoor swimming pool of the town or working out at the open-air gym. Most of the hotels in the town have conference rooms, which ensure appropriate infrastructural background for business tourism. Professional organisations in the fields of medicine, education and other areas of life often choose the town as the venue for their conventions, as they can use the spa and wellness services as incentives for their members and guests. In addition, a multi-functional event centre is being built in the town, which may lay the foundations for MICE tourism in Hajdúszoboszló. In order to be successful on the tourism

market, Hajdúszoboszló has to make sure that its accommodation establishments, both in terms of types and the services offered, meet visitors' demands and are in line with the brand of the town. Following a period of slight decline, the number of accommodation establishments in Hajdúszoboszló has grown again in the last ten years. However, it is mainly the quality of the accommodation offer that has changed. Renovations and extensions have been implemented at many places relying on private investments and government grants. The capacity of the commercial accommodation establishments based on data published by the Municipality of Hajdúszoboszló is shown in Figure 2.

The number of hotels has significantly grown in the town. Some of them offer complex health tourism service packages. The number of guesthouses has also risen in the past decades: 27 units operated in the town in 2019 and in 2020. The number of rooms in guesthouses has also grown over the years. In 2020 308 rooms with 726 beds were available in the town. The category of youth hostels includes 2 units, and there are 2 campsites in the town. On 31 December 2020, there were 76 accommodation service providers, 3,267 rooms and 7,471 beds in the town. Currently, private accommodation establishments offer the highest number of beds, followed by hotels (Municipality of Hajdúszoboszló – Hajdúszoboszló Administrative Website, 2021). As for the accommodation offer of the

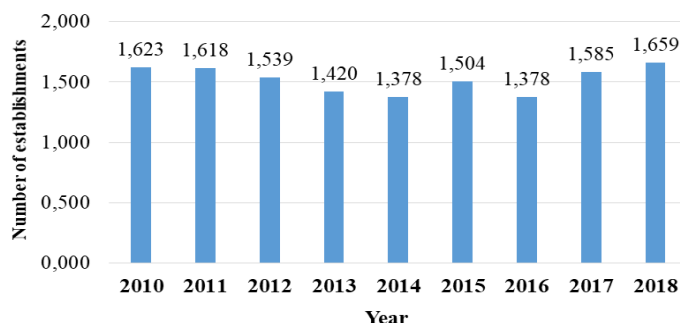


Figure 2. Total number of accommodation establishments in Hajdúszoboszló (pieces) (Source: Own compilation based on data from the Municipality of Hajdúszoboszló, 2021. <https://www.hajduszoboszlo.eu/hszob/>)

town, further improvements can be expected, because a large number of establishments have been supported in the framework of the Kisfaludy Accommodation Development Programme, which provides financial resources to commercial accommodation establishments, hotels, guesthouses, private establishments and other accommodation establishments for service development and capacity enhancement, and also supports the creation of new establishments.

Arrivals and tourist nights in Hajdúszoboszló between 2010 and 2020

Statistical data clearly shows that Hajdúszoboszló is predominantly visited by domestic tourists. In 2019, the last year before the pandemic, the numbers of domestic and international tourism nights were close to 800,000 and over 555,000, respectively, with commercial accommodation establishments and other facilities offering overnight stay for business purposes (typically private tourism accommodation). The number of tourism nights has steadily grown in the past ten years, despite a small setback in the early 2010s, which was mainly caused by the credit crisis that hit the Hungarian economy and society hard, and was consolidated only from 2015. In the following years the number of tourism nights grew continuously up until the emergence of the pandemic (Table 1).

Table 1. Number of tourism nights in Hajdúszoboszló (thousand nights)

(Source: Own compilation based on data from the Municipality of Hajdúszoboszló, 2021 <https://www.hajduszoboszlo.eu/hszob/>)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Domestic tourism nights	721	630	606	632	638	695	748	751	789	799	550
International tourism nights	338	344	373	382	425	435	478	515	538	555	146
Total	1,058	974	979	1,014	1,064	1,130	1,225	1,266	1,327	1,355	697

The number of guests also showed a rising trend until the onset of the pandemic. The figures reflect that by the end of the 2010s the numbers of domestic and inbound tourists in the town had grown by 60,000 and 70,000, respectively, compared to data recorded at the beginning of the decade. It means that over ten years the number of visitors in Hajdúszoboszló grew by about 50% (Municipality of Hajdúszoboszló – Hajdúszoboszló Administrative Website, 2021).

Due to the restrictive measures introduced because of the pandemic, the data recorded in 2020 does not reflect the usual performance of Hajdúszoboszló's tourism. Compared to 2019, the number of inbound and domestic tourism nights fell by 73.6% and 31.1%, respectively. The number of guests also fell drastically in 2020 compared to the previous year by 73.2% and 30.9% in the case of inbound and domestic tourists, respectively (Table 2).

Table 2. Number of guests in Hajdúszoboszló

(Source: Own compilation based on data from the Municipality of Hajdúszoboszló, 2021 <https://www.hajduszoboszlo.eu/hszob/>)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Domestic guests	199,802	180,591	178,109	191,601	198,608	217,545	238,945	248,472	263,320	264,058	182,298
International guests	80,102	87,958	91,735	94,779	106,733	112,343	123,587	135,643	141,591	148,532	39,694
Total	279,904	268,549	269,844	286,380	305,341	329,888	362,532	384,115	404,911	412,590	221,992
Total annual change	-0.94%	-4.06%	0.48%	6.13%	6.62%	8.04%	9.90%	5.95%	5.41%	1.90%	-46.20%

In the last decade, the number of nights spent in Hajdúszoboszló by Polish tourists grew steadily, which is largely explained by the traditionally good relationship of the town with Poland. The role of Romania as a source market has also become stronger with a constantly growing number of tourism nights, apart from a slight drop in 2013. The number of nights spent in the town by tourists from Russia, Ukraine and other countries with visa requirements (e.g., Moldavia)

also shows an upward trend. Data recorded in the years prior to the pandemic (2018, 2019) is especially remarkable: the number of nights spent by Ukrainian tourists grew by 29.08% from 2017 to 2018, and by 44.73% from 2018 to 2019.

The number of nights spent by Russian tourists also grew dynamically since 2017, resulting in close to 25,000 nights spent in Hajdúszoboszló in 2019 (Table 3). The significance of Germany as a source market has been decreasing in Hajdúszoboszló for years, which is reflected in the number of the nights spent in the town by German tourists and in their number as well. The number of nights spent by German tourists fell from 92,962 in 2010 to 42,763 in 2019 (Table 3). The number of German guests has also been nearly halved in the last ten years. However, the average time spent in the town by German tourists is still the highest compared to other nations' figures (Figure 3).

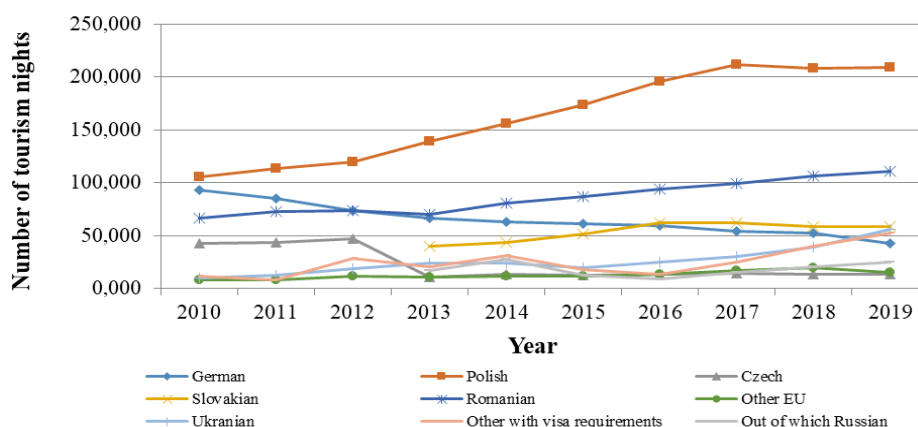


Figure 3. Change in the number of tourism nights in Hajdúszoboszló by nationality (Source: Own compilation based on data from the Municipality of Hajdúszoboszló, 2021 <https://www.hajdusoboszlo.eu/hszob/>)

Table 3. Number of tourism nights in Hajdúszoboszló by nationality

(Source: Own compilation based on data from the Municipality of Hajdúszoboszló, 2021 <https://www.hajdusoboszlo.eu/hszob/>)

Nationality	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
German	92,962	84,910	73,287	66,238	63,401	61,049	59,683	54,229	52,715	42,763	8,061
Polish	105,460	113,509	119,688	139,402	156,384	173,751	195,855	212,192	208,230	209,178	54,544
Czech	42,817	43,597	46,789	11,012	13,169	12,606	13,486	14,286	13,736	13,208	3,385
Slovakian				40,259	44,056	51,475	62,533	62,426	58,601	58,526	21,918
Romanian	66,433	73,119	73,870	70,043	81,209	87,329	94,268	99,725	106,421	110,583	27,089
Other EU	8,004	8,502	11,989	10,549	11,820	11,484	13,908	17,011	19,519	15,254	3,174
Ukrainian	10,008	12,757	19,067	24,149	23,883	19,709	24,863	30,119	38,878	56,267	16,826
Other, subject to visa requirements	11,921	8,006	28,200	20,529	31,428	17,911	13,357	25,192	39,863	52,072	11,260
Of which Russian				17,303	27,312	13,099	9,035	14,941	20,737	24,890	4,994

From 2013, in the Other EU category data for Austria, Belgium, the Netherlands, the UK, Italy and Sweden is available.

From 2018, the Other with visa requirements category includes Moldova

Table 4. Number of international guests in Hajdúszoboszló by nationality

(Source: Own compilation based on data from the Municipality of Hajdúszoboszló, 2021 <https://www.hajdusoboszlo.eu/hszob/>)

Nationality	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
German	8,431	7,675	6,960	6,133	5,745	5,592	5,813	5,433	5,523	4,559	1 120
Polish	27,905	31,829	31,383	36,081	41,019	44,584	49,570	54,118	53,415	53,980	14 064
Czech				2,528	2,920	2,831	2,846	3,194	3,155	2,864	865
Slovakian	13,143	14,015	14,918	13,278	15,390	18,105	21,095	21,908	20,502	20,671	7 647
Romanian	24,342	26,687	26,699	24,207	28,139	30,243	32,630	35,418	37,912	38,962	9 347
Other EU	2,305	2,390	3,356	3,383	3,700	3,533	4,032	4,786	5,215	4,626	955
Ukrainian	2,203	3,870	4,839	5,987	5,708	4,405	5,309	6,631	9,455	13,374	3 593
Other, subject to visa requirements	1,773	1,492	3,580	3,197	4,083	3,050	2,292	4,155	6,414	8,408	2 101
Out of which Russian				2,344	3,041	1,782	1,330	2,027	3,296	3,923	950

From 2013, in the Other EU category data for Austria, Belgium, the Netherlands, the UK, Italy and Sweden is available.

From 2018, the Other with visa requirements category includes Moldova

In terms of the number of guests, the major source markets of Hajdúszoboszló are Poland, Romania and Slovakia, followed by the Ukraine, other countries with visa requirements, and Germany (Table 4). The pandemic situation proved the benefits of maintaining a diverse portfolio of the source markets, which may reduce the risks related to negative changes in the individual markets. Based on data from the last decade, the fall in the number of German guests seems unstoppable. It is common knowledge that in the off-season period Hajdúszoboszló is mostly visited by senior guests, who wish to spend some quality time and get various treatments at the spa town. Regarding German travellers, Hajdúszoboszló has to compete with spa towns located in West-Hungary, which also offer reasonably priced, high-quality services, and are closer to German-speaking countries. In general, Hungarian spa towns have not been able to reach younger generations and families in the German source market. By contrast, the number of Polish guests rose steeply in the years before the onset of the pandemic. They typically arrive with their families in the high season and are often engaged in various activities, including organised trips to Hortobágy, Lake Tisza or Debrecen, besides enjoying the spa facilities of the town. The number of visitors from Slovakia also dynamically grew until 2020. They like to spend their family holidays in Hajdúszoboszló and enjoy the

unique range of spa services. The number of Romanian guests nearly doubled in the last ten years, and we can assume that the single obstacle to achieving that was the pandemic. Due to the proximity of the source market, Romanian tourists often arrive only for a few days or for a long weekend, sometimes multiple times a year. In addition to private tourism accommodation, they also like hotels that offer wellness services. The number of Ukrainian tourists grew from 2203 in 2010 to 13,374 in 2019, which can be considered the best year for tourism before the emergence of the pandemic (Table 5).

Table 5. Change in the number of guests in Hajdúszoboszló (%) compared to previous years by nationality
(Source: Own compilation based on data from the Municipality of Hajdúszoboszló, 2021 <https://www.hajduszoboszló.eu/hszob/>)

Nationality	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
German	8,431	7,675	6,960	6,133	5,745	5,592	5,813	5,433	5,523	4,559	1,120
Change	-6.01%	-8.97%	-9.32%	-11.88%	-6.33%	-2.66%	3.95%	-6.54%	1.66%	-17.45%	-75.43%
Polish	27,905	31,829	31,383	36,081	41,019	44,584	49,570	54,118	53,415	53,980	14,064
Change	-9.89%	14.06%	-1.40%	14.97%	13.69%	8.69%	11.18%	9.17%	-1.30%	1.06%	-73.95%
Czech				2,528	2,920	2,831	2,846	3,194	3,155	2,864	865
Change	13,143	14,015	14,918		15.51%	-3.05%	0.53%	12.23%	-1.22%	-9.22%	-69.80%
Slovakian				13,278	15,390	18,105	21,095	21,908	20,502	20,671	7,647
Change		6.63%	6.44%		15.91%	17.64%	16.51%	3.85%	-6.42%	0.82%	-63.01%
Romanian	24,342	26,687	26,699	24,207	28,139	30,243	32,630	35,418	37,912	38,962	9,347
Change	-11.63%	9.63%	0.04%	-9.33%	16.24%	7.48%	7.89%	8.54%	7.04%	2.77%	-76.01%
Other EU	2,305	2,390	3,356	3,383	3,700	3,533	4,032	4,786	5,215	4,626	955
Change	-0.69%	3.69%	40.42%	0.80%	9.37%	-4.51%	14.12%	18.70%	8.96%	-11.29%	-79.36%
Ukrainian	2,203	3,870	4,839	5,987	5,708	4,405	5,309	6,631	9,455	13,374	3,593
Change	-3.80%	75.67%	25.04%	23.72%	-4.66%	-22.83%	20.52%	24.90%	42.59%	41.45%	-73.13%
Other, subject to visa requirements	1,773	1,492	3,580	3,197	4,083	3,050	2,292	4,155	6,414	8,408	2,101
Change	-10.81%	-15.85%	134.00%	-10.70%	27.71%	-25.30%	-24.85%	81.28%	54.37%	31.09%	-75.01%
Out of which Russian				2,344	3,041	1,782	1,330	2,027	3,296	3,923	950
Change					29.74%	-41.40%	-25.36%	52.41%	62.60%	19.02%	-75.78%

Length of stay in Hajdúszoboszló

Data from the last ten years shows that, similarly to other destinations, the average length of stay decreased in Hajdúszoboszló both in terms of domestic and inbound tourism (Table 6). This unfavourable development reflects a global trend, namely that tourists spend shorter periods at destinations, but are more likely to travel several times a year. German tourists typically visit the town as health tourists to get various treatments and, accordingly, stay longer, while tourists from the neighbouring countries usually spend less time in Hajdúszoboszló (Table 6).

Table 6. Average length of stay in Hajdúszoboszló (nights)

(Source: Own compilation based on data from the Municipality of Hajdúszoboszló, 2021 <https://www.hajduszoboszló.eu/hszob/>)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Length of stay – domestic	3.61	3.49	3.40	3.30	3.21	3.19	3.13	3.02	3.00	3.00	3.02
Length of stay – international	4.21	3.92	4.06	4.03	3.99	3.87	3.87	3.80	3.80	3.78	3.68
Change – domestic	-5.05%	-3.32%	-2.58%	-2.94%	-2.73%	-0.62%	-1.88%	-3.51%	-0.66%	0.00%	0.67%
Change – international	4.78%	-6.89%	3.57%	-0.74%	-0.99%	-3.01%	0.00%	-1.81%	0.00%	-0.53%	-2.65%

Examination of tourism demand based on the questionnaire survey

In order to gain a better understanding of the demand side of the tourism market, primary research was conducted in 2021. Due to the pandemic, an online questionnaire was used, participation was anonymous and voluntary.

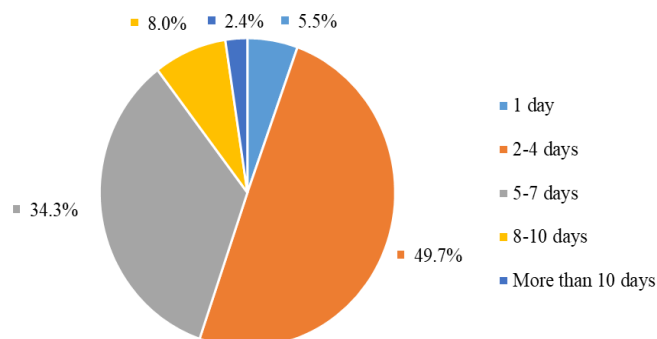


Figure 4. Respondents' length of stay in Hajdúszoboszló (N=286) (Source: Own research, 2021)

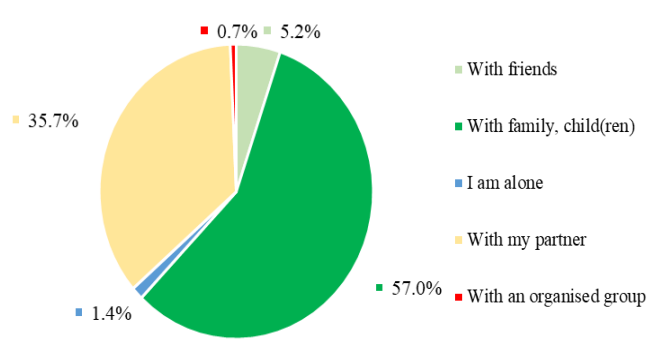


Figure 5. Responses to the question: "Who did you come with to Hajdúszoboszló?" (N=286) (Source: Own research, 2021)

The target group of respondents consist of those who spent at least one night in Hajdúszoboszló over the previous 5 years, which resulted in a sample of 286 respondents. The average age of respondents was 46.6 years with 7% under 30, 19.5% between 30 and 39, 35% between 40 and 49, 33% between 50 and 59, and 5.5% over 60 years of age. The youngest participant was 19, and the oldest respondent was 76 years old.

The proportions of female and male respondents were 91.8% and 8.2%, respectively. Most of the participants were Hungarian citizens, but the sample also included 1 Hungarian-Romanian, 4 Romanian, 1 Slovakian and 1 German national. Regarding spa services, 71.1% of the respondents used the thermal bath mainly. The wellness section and the aquapark were also popular (70.2%). 14.8% usually took beauty treatment and massage, while 9.5% took medical treatments, diagnostic and related services. Only 2.3% indicated that they never used any of the services in the list.

Nearly half of the respondents (49.7%) stayed for 2 - 4 days in Hajdúszoboszló, and 34% spent 5 - 7 days in the town (Figure 4). The majority of respondents came to Hajdúszoboszló with their spouse and children (57%) or with their partners (35.7%) (Figure 5). Most of the respondents (37.8%) stayed at private tourism facilities, while 26.2% stayed at 4-star hotels. Many chose a 3-star hotel (17.8%) or a guesthouse (10.5). Some respondents stayed at a local acquaintance's place (4.2%), and a small proportion (2.8%) chose a campsite. Only 0.7% stayed in their own properties (Figure 6).

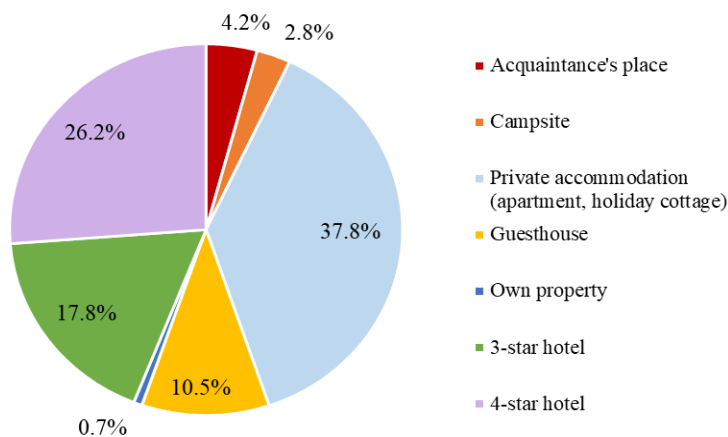


Figure 6. Most often used types of accommodation in Hajdúszoboszló (N=286) (Source: Own research, 2021)

We defined 24 aspects for the respondents to evaluate on a 1-5 scale (5 = Excellent, 4 = Good, 3 = Average, acceptable, 2 = Barely acceptable, 1 = Below standard, not acceptable). Table 7 shows the results for each aspect based on the averages of points given by respondents.

The table below shows that the guests who participated in the survey were very satisfied with the available services and the terms and conditions of accommodation. The quality of thermal water and the spa received exceptionally high scores, which may be the result of the development projects implemented in recent years. They were followed by the spa town atmosphere, neat public areas, and the hospitality of locals in the ranking, all of them with high scores. The open questions provided respondents with an opportunity to elaborate on why they liked Hajdúszoboszló. Many answers reflected a high level of satisfaction with the town, the spa complex, and the programme offer: "We love it! Beautiful town and spa, nice walks in the evenings", "I love the atmosphere of the shopping area", „Nice people" and „Superb events". The results also reveal that noise, traffic and crowd were the most annoying factors for the guests. However, it is interesting too, that the demand for rapidly developing rural tourism products was not reported by visitors (Lakner et al., 2018; Palkovics and Kőszegi, 2021; Hoyk et al., 2022). These issues need to be addressed by the local planners (Table 7).

Table 7. Respondents' level of satisfaction with the tourism supply of Hajdúszoboszló (Source: Own research, 2021)

Aspect	Average
Thermal water quality	4.81
Spa quality	4.79
Spa town atmosphere	4.66
Neat public areas	4.65
Hospitality	4.65
Accessibility of town	4.58
Tidiness of town	4.57
Restaurants, bars	4.52
Quality of new developments	4.52
Public safety	4.50
Natural environment	4.50
Quality of events, festivals	4.48
Entertainment and leisure facilities	4.38
Shopping facilities	4.38
Infrastructure (e.g., road quality)	4.21
Quality and diversity of souvenirs	4.20
Price level of products and services	4.18
Number of tourists in the town	4.09
Sport facilities	4.05
Composition of tourists	3.99
Tidiness	3.99
Noise	3.92
Traffic	3.73
Crowdedness	3.64

CONCLUSIONS AND RECOMMENDATIONS

The pandemic highlighted the extreme vulnerability of the tourism industry. Never before had global tourism experienced a setback of this scale, and this makes the analysis of demand for individual destinations very important, as the results may help the identification of potential target markets and new demand segments.

The results of Hajdúszoboszló's tourism industry confirm that efforts should be made to reach a diverse range of source markets, in addition to attracting domestic visitors. We can also conclude that the town's offer covers all stages of the family life cycle (young single individuals, young married couples, single parents with kids, parents with kids, older married couples, older single individuals etc.). The family-friendly establishment of the town and the spa complex, as well as the range of services create ideal conditions for targeting primarily families with kids, including multi-generation families. The services that are important for the target group, including the lido, the aquapark, the thermal pools, wellness and therapeutic treatments, are already in place. However, families also expect and appreciate a varied and colourful range of services that is refreshed and extended from time to time.

The other main target group consists of tourists who come to Hajdúszoboszló for medical treatment, and have conditions for which local thermal water is medically recommended. They tend to stay longer, as treatment programmes usually take at least 1 week. Many of them are even prepared to stay for 2-3 weeks in order to get better. This segment basically includes middle-aged and older tourists, who have already experienced the positive effects of the local thermal water, or would like to try out physiotherapy treatments in order to prevent or treat various medical conditions. When planning

marketing activities as well as new features or services, it should be borne in mind that the senior age group is not homogenous, with a growing proportion demonstrating interest in various activities and programmes outside the spa as well.

The range of services offered by Hungarospa Hajdúszoboszló also allows us to identify the segment of young adults (18-35) living an active lifestyle as a target group. They look for unique experiences, like wellness services, and typically come to the town with their partners or friends. With a view to the more efficient sales of health tourism services, more efforts should be made to reach the middle-aged segment. In the 40-60 age group health tourism services should be promoted as services that support not only rehabilitation, but prevention as well. A sad consequence of the pandemic is the appearance of post-covid rehabilitation packages, which are available at an increasing number of destinations. As a spa town, Hajdúszoboszló is a perfect place for guests who need to recover from the long-term symptoms of the disease.

Based on segmentation according to lifestyle, we can establish that Hajdúszoboszló's tourism supply may even satisfy the expectations of the LOHAS (Lifestyles of Health and Sustainability) group. Members of the group are committed to a healthy and environmentally conscious lifestyle, have lucrative jobs, are highly educated, and appreciate premium services.

Due to the location of the town, the domestic target group of Hajdúszoboszló includes the whole population of Hungary, with special emphasis on Budapest, as well as Pest, Borsod-Abaúj-Zemplén, Heves and Szabolcs-Szatmár-Bereg counties.

Based on data on the inbound arrivals and tourism nights, we can conclude that the most important source markets of the town are Poland and Romania. Polish guests typically arrive with their families in the high season, and prefer to stay at hotels and private tourism facilities. The average length of stay of Romanian visitors is less than that of Polish guests. They often spend a weekend or two in Hajdúszoboszló in the low season, typically at a hotel. The numbers of visitors from Slovakia, Ukraine and Russia are also impressive, and the source market of Moldova has also improved a lot over the last few years. As for German guests, their relatively low number is offset by a relatively high number of nights spent and the average length of stay, compared to other nations. They typically spend some time in Hajdúszoboszló in the mid- or low season. This data confirms that efforts should be made to keep the German source market.

In 2021, due to the pandemic, Hungary opened its borders to holiday tourists only in July, which means that inbound tourism started only then in the town. Based on statistical data, we can conclude that the target market segmentation in Hajdúszoboszló was adequate, and the main directions defined should be followed in the future. The balanced ratio of domestic and inbound tourism and the diversity of international source markets are very favourable for the town; a tendency that has been confirmed during the pandemic. This diversity should be maintained in the future, as it reduces the risks related to sudden changes in the individual markets. Ongoing, and planned touristic developments allow the town to lay more emphasis on sport, cultural and business tourism in the future, to complement its traditionally successful health tourism. Data from recent years confirms the significance of creating complex tourism products, and regional cooperation of destinations in the fields of product development, marketing and sales are crucial.

The main tourist attraction of Hajdúszoboszló is HUNGAROSPA, the spa complex itself, therefore its continuous development and extension should remain a priority. Strongly related issues are the establishment and maintenance of a spa town atmosphere and image, and the improvement of infrastructure and accessibility. We consider the more efficient diversification of tourism products, the extension of the range of services in the MICE sector, and the development of gastro, cultural and sport tourism reasonable directions. One of the prerequisites of the development of tourism is local and regional cooperation, and the collaboration of local actors with the involvement of the municipality, the TDM organisation and industry associations. Efforts made to establish a "smart tourism destination" also make cooperation among entities involved in the tourism industry necessary, in addition to maintaining a strong technological infrastructure. In line with these priorities, the key objective of Hajdúszoboszló may be to increase revenue generated by tourism, improve the quality of services, and thereby to enhance guest satisfaction and the life quality of locals.

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