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**Spatial and structural problems of the spread of campsites
in Hungary**

PhD Thesis

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1 INTRODUCTION AND OBJECTIVES

Since campsites began to spread (1959), the structure of domestic accommodation places has undergone significant changes, during which the role of campsites has also changed several times. From Central Statistical Office (KSH) figures it can be concluded that there were periods when the share of campsite bed places exceeded half of the total commercial accommodation capacity, which indicates their critical importance. Even though this share nowadays stands at “only” 29%, with this capacity size representing one third of the overall bed-place capacity campsites are the second largest group among commercial accommodation providers. This magnitude alone justifies a closer examination of camping tourism but the need for such an exercise is also pointed out by the fact that campsites not only offer accommodation options that follow trends in demand but are also popular with guests in many other strengthening sectors of tourism.

In addition, tourism in Hungary has for many years been determined by special characteristics such as geographic concentration and seasonality as well as the above-mentioned structure of domestic accommodation places. The supply side of tourism is basically determined by, among many other subcomponents, the available accommodation’s type, quality standard, geographical location and share within the total supply of places to stay. Naturally, as with all components of supply, bed places are expected to meet demand-side requirements. The level of satisfying demand is well illustrated by occupancy rates, while how demand will develop is forecast by research on trends of consumption habits.

So far campsites have been discussed as a segment of accommodation. However, attention should also be devoted to the issue of camping tourism. The term “camping tourism” elevates campsites to a different level within the system of tourism. It projects a level of development where the campsite offers services of such a high standard and diversity, or attractions around it are so prominent that, apart from the main attractions as the foundation on which the campsite was originally built, the campsite will become a standalone attraction itself. In that case the campsite as such will be a touristic product in the system of tourism. It is another question whether that quality standard exists in Hungary or a similar tendency can be discovered in the case of domestic campsites.

According to the initial assumption campsites, just as the majority of different accommodation types, have been established near a tourist attraction, as it is an attraction rather than accommodation that primarily appeals to tourists. Therefore, it is worth having a closer look at attractions that determine the location of campsites, whether there are particularly strong pulling factors at play, and whether all that is reflected by a particular geographic concentration of

campsites. For example, a first overview of the subject matter already revealed that there were a number of natural characteristics which attracted a particular campsite and must have played a key role in establishing the facility. Primary mention should be made of the importance of natural waters and watersides and the pulling effect of thermal and medicinal spas. Our mountains appear to be another major attraction. In addition to natural characteristics, social conditions also greatly influence the geographical location of campsites. Research and analyses will provide answers to further details of this question.

The overall objective of this paper is to provide, against a particular set of criteria, an exploratory analysis of campsites as an accommodation option and a defining component of tourism in Hungary. The research covers the whole of Hungary but different aspects of the survey only encompass a few areas due to the complexity of the subject. As a result, my research focussed on the following goals:

- Gain a comprehensive picture of the proliferation of campsites in the country and assess their weight and role in the system of tourism and the structure of accommodation.
- Explore connections between the geographic location, accessibility, capacity and quality standards of campsites.
- Study the characteristics of domestic campsite visitors and changes in the volume of customers over time, as well as identify interactions between campsites' innovation capability and guest requirements.
- Make an attempt to outline those factors which can affect the future development of campsites and examine improvement efforts that can contribute to the emergence and dynamic development of camping tourism.

2 RESEARCH METHODS

In accordance with the above goals I have reviewed domestic and international specialised literature available on the subject, processed legislation governing the area, prepared detailed analyses, conducted interviews and a questionnaire survey, and made field trips.

Primary research

Field trips

During field trips across the country (covering places ranging from Tisza-mogyorós to Kimle, from Martfű to Pápa, from Orosháza to Dombóvár etc.), I visited campsites established on different attractions (e.g. watersides, or

thermal and medicinal spas), categorised in different quality classes and offering differing services, in order to familiarise myself with the practical aspects and special features of their operation. In order to expand my domestic experience and gain an understanding of the international situation I also visited 18 campsites in the following countries: Austria, Slovenia, Italy, France, Spain Portugal and Greece. In addition, I also tried wild camping in a few countries.

Conducting interviews

Respondents included campsite operators (e.g. the owner of the 4-star Medicinal Campsite in Martfű), leaders of camping associations (Vice President of the Hungarian Camping Association) and an NGO (President of the Hungarian Camping and Caravanning Club), as well as experts and specialists involved in tourism management and research.

Questionnaire survey

I conducted a survey among the full-time BSc students of the Budapest Business School's College of Commerce, Catering and Tourism in order to have an understanding of young persons' camping habits. 172 questionnaires were completed and evaluated as part of the survey.

Secondary research

Review of specialised literature

The review of specialised literature revealed that few researchers focussed on campsites and the main lines of research on the subject had not crystallised yet, which both helped and hindered my work. It made it easier in that it was a new area of research but also more difficult because of the absence of theoretical anchors which could have served to underpin the present paper.

However, secondary research also had a special aspect stemming from the subject area itself. Campsites and camping tourism are a complex phenomenon. Their existence, development and spatial spread are exposed to both economic and social influences. It was this complexity that foreshadowed the thematic diversity of literature as the context of the subject. There was yet another factor that made research into literature a special exercise, namely the exploration of the past besides a focus on the present. Without that it would have been hardly possible to plot the directions of change.

The geographic aspect and spatial-structural context of the subject were provided by studies outlining a socio-geographic, spatial-structural, tourism-geographic and regional framework for tourism research. Camping tourism's systemic and conceptual determination called for tourism-theoretical studies as well. Meaningful information on the spread and development of campsites was gained from press articles from different periods. The subject was put into a professional context by processing literature on foreign tourism and revealing the features of the development of domestic and international tourism period by

period. Information on today's economic and social background was obtained from the press. Topical tasks that needed to be done were identified from presentations delivered at different conferences addressing tourism. The review of existing tourism development strategies and plans clearly revealed what developments could be expected in respect of campsites both at national and regional levels.

Review of the regulatory framework

Both in Hungary and in all other countries there is legislation providing rules with regard to accommodation places utilised for tourism purposes. These rules also determine what parameters should be met by the different types of accommodation categorised into quality classes. Thus legislation also includes exact provisions on campsites, which had to be monitored closely in the research as some data changes were linked to regulatory changes. Campsites were subject to regulation rather soon after their emergence so the regulatory background was examined from 1961 to date.

Review of Internet-based sources

In part I used the Internet for obtaining information about campsites' facilities, services and infrastructure. Blogs run by travellers proved highly educating sources of information where guest opinions provided a "warts and all" picture of campsites and their services.

Processing statistical data

The central focus of this paper, namely the recent and present state of campsites and the description of changes, was primarily supported by data series issued by the Central Statistical Office (KSH). All data series ranging from main figures to unit-level data on capacity and bednights had to be scrutinised with a special focus on regional aspects. What made the conduct of the research difficult was the fact the KSH had not processed unit-level data for the 1965-1985 period, and thus it was not possible to prepare an in-depth analysis for that period.

I have made the processed statistical data and their percentage distribution more tangible by using diagrams.

I use a series of maps to show the spatial-structural characteristics of data in order to make campsites' spatial changes even more visible.

Comparing the databases of professional organisations and experts including those of Magyar Turizmus Zrt, the Hungarian Camping and Caravanning Club, the Association of Hungarian Campsites, and Dutch camping expert Frits Niessen lent a special flavour to the research.

3 RESULTS

Reconsidering the concept of camping and defining camping tourism as a touristic product

For preparing this paper it was necessary to clarify the concepts of campsites, camping and camping tourism. The definition of a campsite has been clearly covered by legislation since the beginning, so it was sufficient to rely on that. The concept of camping has been subject to analysis by several experts such as L HOLÉNYI (1975), R SZAUER (1961), M EBERT (1962) and Á MENYHÁRT (1985), but legislative changes called for rethinking it. The term “camping tourism” has been used in specialised literature before e.g. by Á MENYHÁRT (1985) and L JENKEI (2002), but categorising it as a touristic product has not been considered so far.

Thus it was first necessary to clarify the basic concepts in order to study the characteristics of the spread and development of campsites. To begin with, campsites as accommodation places were long preceded by camping as an outdoor leisure activity. Camping as we know it is primarily linked to spending free time. However, today it also happens that tourism professionals choose campsites as an accommodation option e.g. at conferences, so it is no longer useful to emphasise the leisure component of the concept. In addition, many campers tow or carry with them their own accommodation today as well, while it is increasingly widespread to use fixed accommodation places (fixed tents, static caravans, mobile homes, wooden lodges etc.), which elements modify the relevant part of the definition of campsites, let alone the fact that even among tourists in the modern sense of the word there are those who visit campsites for the informal lifestyle, which indicates a quality change in demand.

In accordance with the above, in my interpretation camping today can be defined as follows:

By camping we mean the passing of leisure time in relation to tourism which provides guests with an opportunity to practice a form of “informally limited” lifestyle along with appropriate infrastructure and services. (The expression “informally limited” refers to the acceptability of a free and relaxed lifestyle within the boundaries of the moral and hygienic norms of coexistence and on condition that the rules of adaptation, tolerance and mutual respect are observed.)

The clarification of concepts raised yet another question, which was related to the definition of touristic products, namely whether or not there was such a thing as camping tourism as a product. To answer that question first the definition of touristic products, which had been dealt with by several domestic researchers including M LENGYEL (1994, 2000), G MICHALKÓ (2004) and L PUTZKÓ – T RÁCZ (2005), had to be examined. There had been interpretations of the concept of camping tourism itself but those definitions tended to lay

emphasis on the characteristics of campsites as a type of accommodation and clearly treated them as such, not more and not less. And that, of course, is a natural approach. Indeed, it is evident that among commercial accommodation options campsites form a part of supply, so it is logical that they should be treated as such.

Still, from the perspective of the tourist, there are other aspects of campsites that may come to the foreground. It is the need for practising an informal and relaxed lifestyle associated with campsites that changes their image. For, with a tourist who is traditionally a camper the decision-making process occurs in a different way from that in the case of guests preferring other types of accommodation. In selecting a destination campers attach the campsite to the attraction they look for, i.e. make their choice of attractive destinations while at the same time also look for a campsite that will meet their needs. Therefore it can be assumed that with other tourists the place to stay is of secondary importance since at a particular resort location hotels offer a wider range of services and have larger capacities, so the selection of accommodation will come after selecting the destination. The case where the campsite itself is presumed to be the actual attraction should also be looked at. If that situation occurs then the campsite will be elevated to another quality level within the system of tourism, from the category of primary superstructure to that of pulling forces. That will then foreshadow a level of development where the quality of campsite services is of such a high standard that in addition to the primary attraction, upon which the campsite has been established, the campsite itself is promoted as a standalone attraction.

Based on all that, campsites that have gained the status of a standalone attraction will become touristic products themselves. In a situation where campers seek attractions and campsites together as they have preference for this type of accommodation because of the informal, relaxed lifestyle, it can be said that for these guests the campsite is no longer merely a place to stay but is an inseparable part of the attraction and hence has become a proper product.

Exploring regional changes in campsite capacity and quality

I studied changes in regional correlations in the 1990-2008 period.

Regional capacity changes can be summarised as follows. Clearly there were four natural and social pulling factors that had a significant influence on the establishment of campsites. These included watersides, mountains, thermal and medicinal spas, and big cities. The effect of the four pulling factors is the regional concentration of campsites.

In respect of *watersides* the most prominent area with a high concentration of campsites is Lake Balaton, where campsite capacity has always been the highest. In 1990, 36 campsites in settlements on the Balaton shoreline had a total capacity of over 41,000 bed-places (or 41% of the overall national campsite

capacity). In 2008, there were 41 campsites with 24,500 bed-places (28% of the current total campsite capacity) (see *Table 1*). Among lakes, the number of campsites also grew around Velence and Lake Tisza, and in the same period under review a steady increase in the number of campsites linked to fishing lakes was also observed. In respect of rivers, the Danube generally had a rather low number of campsites attached to it except for a transitional period between 1990-1995, where these facilities grew in both number and capacity in the Danube Bend region, but then gradually fell from 1995. The Szigetköz region showed signs of moderate development but only six campsites offered accommodation here even in 2008. On all sections of the Tisza, steady growth in capacity took place up until 2000 and then was followed by stagnation in the supply of places to stay.

Campsites in *mountain regions* underwent speedy development before, and peaked in capacity in, 1995, with 12 campsites offering a total of 3,245 bed-places, and then their capacity slowly dropped to a stagnant 2,500 bed-places (see *Table 1*). Geographically they are concentrated in the Bükk and Mátra regions. Surprisingly, the Bakony, Vértes and Börzsöny regions as traditional trekking scenes are uncharted territories in respect of campsites.

The capacity of campsites near *thermal and medicinal spas* steadily grew up until 2005, and then dropped by 1,000 bed-places by 2008. While in 1990 there were 43 campsites with a total capacity of 15,197 bed-places offering accommodation near thermal or medicinal spas, in 2008 they numbered 63 and had an overall capacity of 23,078 bed-places (see *Table 1*), which exceeded one quarter of the total national capacity. The number of campsites was nearly identical to that of spas in both Transdanubia and East-Hungary (30 and 33, respectively), but Jász-Nagykun-Szolnok County was outstanding in this respect with 11 campsites of this kind and a total capacity of 4,181 bed-places.

Finally, the campsite situation with regard to *large cities* showed a varied picture. Primary mention has to be made of the capital, where the available campsite capacity unfortunately did not meet what could have been expected of a city with so many visitors. An initial growth until 1995 was discernible in Budapest, too, by the addition of 8 new campsites by 1995 to the existing 4 in 1990 thus increasing the accommodation capacity to 4,157 bed-places. Apart from a slight reduction, this capacity level was maintained until 2000, but then it was followed by a sharp decline by 2005. There was one additional campsite established and hence capacity increased by 2008. (See *Table 1*). This overall outcome would not be so significant had it been offset by an opposite process around the capital, which unfortunately was not the case (see the Danube Bend region).

Looking at the aggregate figures of county seats, again growth took place until 1995 and then a decline began, bringing the total number of campsites to 17 with an overall capacity of 5,350 bed-places by 2008 (see *Table 1*). In the period under review there were two county seats, Szeged and Debrecen, where

high campsite capacity was available. In the ranking order by capacity level of settlements there are some other large cities that can be highlighted in the overall period under review, including Siófok, Balatonfüred and Balatonszemes.

Table 1 Regional breakdown of campsite capacity 1990-2008

Regional location of campsites	Number of campsites					Number of bed-places				
	1990	1995	2000	2005	2008	1990	1995	2000	2005	2008
Balaton shoreline	36	43	51	51	41	41.023	37.101	37.275	29.762	24.525
Danube Bend	9	11	9	5	4	2.590	2.530	2.190	2.475	975
Lake Velence	5	14	10	11	8	3.660	6.114	5.193	4.550	1.951
Lake Tisza	4	16	23	18	17	2.290	4.755	5.054	4.972	5.581
Fishing lakes	9	13	28	29	36	3.750	4.850	6.070	6.240	9.353
Mountain regions	11	12	13	13	9	2.907	3.245	2.750	2.528	2.575
Thermal and medicinal spas	42	47	50	55	63	15.717	17.260	17.218	24.112	23.078
Budapest	4	12	8	4	5	3.133	4.157	3.978	870	1.028
County seats	25	40	35	21	17	8.625	9.817	8.129	5.528	5.350
Total national capacity	165	296	319	273	249	97.631	105.263	102.762	94.136	87.673

Source: KSH data and own compilation

Besides the above, I also completed a comparison of regional campsite-capacity characteristics at the *county* level and arrived at the following results.

Because of Lake Balaton's prominent role it came as no surprise that Somogy County had the highest number of campsites and the largest campsite capacity of 24,253 bed-places in 1990. Veszprém County came second with 17 campsites and 16,890 bed-places, while Jász-Nagykun-Szolnok stood at the third place with 12 campsites offering 5,482 bed-places. The smallest capacity was found in Nógrád and Békés Counties (see *Tables 2 and 3*). According to figures there were altogether 25 campsites available at our county seats in 1990, while three county seats (Békéscsaba, Székesfehérvár and Zalaegerszeg) had no campsites at all.

In 1995, the ranking order of counties was still led by Somogy County in terms of the numbers of both campsites and bed-places. However, it can be observed that while compared to the previous period the number of campsites rose, their capacity significantly declined at the same time. Zala County was second in the ranking order but the capacity of campsites here was exceeded twice by Veszprém County's 20 campsites. Veszprém and Jász-Nagykun-Szolnok counties ranked third with 20 campsites each, but in terms of capacity Zala County's campsite capacity was higher than that of Szolnok County by about 1,000 bed-places due to more campsites. The fewest campsites were registered in Tolna, Nógrád and Békés Counties. Békés County's campsites had the lowest total accommodation capacity of not even 900 bed-places (see *Tables 2 and 3*). In 1995, there were 40 campsites at our county seats with an aggregate capacity of nearly 10,000 bed-places. Békéscsaba, Tatabánya and Zalaegerszeg were those county centres where there were no campsites.

In 2000, Veszprém and Jász-Nagykun-Szolnok counties were ahead of Somogy County with 31 campsites each but neither could exceed Somogy's campsite capacity of 17,565 bed-places. With 17.305 bed-places, Veszprém County came second and Zala stood at the third place surpassing Jász-Nagykun-Szolnok County. The fewest campsites were located in Nógrád, Békés and Tolna Counties. The lowest accommodation capacity was offered by Békés County and Nógrád County (825 and 940 bed-places, respectively). (See *Tables 2 and 3*). Again, there were three county seats that did not provide any campsite accommodation (Békéscsaba, Zalaegerszeg and Szekszárd).

Table 1 Changes in the number of campsites in Budapest and by county 1990-2008

Counties	Number of campsites				
	1990	1995	2000	2005	2008
Budapest	4	12	8	4	5
Baranya	7	13	14	11	10
Bács-Kiskun	8	19	15	13	14
Békés	3	6	5	9	6
Borsod-Abaúj-Zemplén	6	13	20	21	16
Csongrád	10	12	17	13	12
Fejér	6	18	13	12	9
Győr-Moson-Sopron	7	14	17	16	13
Hajdú-Bihar	9	13	9	11	10
Heves	4	10	13	14	12
Jász-Nagykun-Szolnok	12	20	31	22	22
Komárom-Esztergom	6	9	16	11	11
Nógrád	5	6	4	3	4
Pest	9	19	12	5	6
Somogy	26	29	30	24	20
Szabolcs-Szatmár-Bereg	5	17	17	14	18
Tolna	5	6	5	4	4
Vas	9	18	17	13	14
Veszprém	17	20	31	29	19
Zala	7	22	25	24	24
Total	165	296	319	273	249

Source: KSH data and own compilation

In 2005, Veszprém County led the ranking order of counties with 29 campsites and 15,160 bed-places. The second and third places were occupied by Somogy and Zala Counties each having 24 campsites. In terms of capacity Győr-Moson-Sopron County came third offering 8,870 campsite bed-places in total. (This single outstanding figure was attributed to the campsite at Hegykő – probably due to a typing error in my opinion). On this list Zala County dropped back to the fourth place with its capacity of 8,391 bed-places. In the same year Nógrád County had the fewest campsites along with the capital and Tolna County. The smallest capacity was recorded in Pest County followed by Nógrád

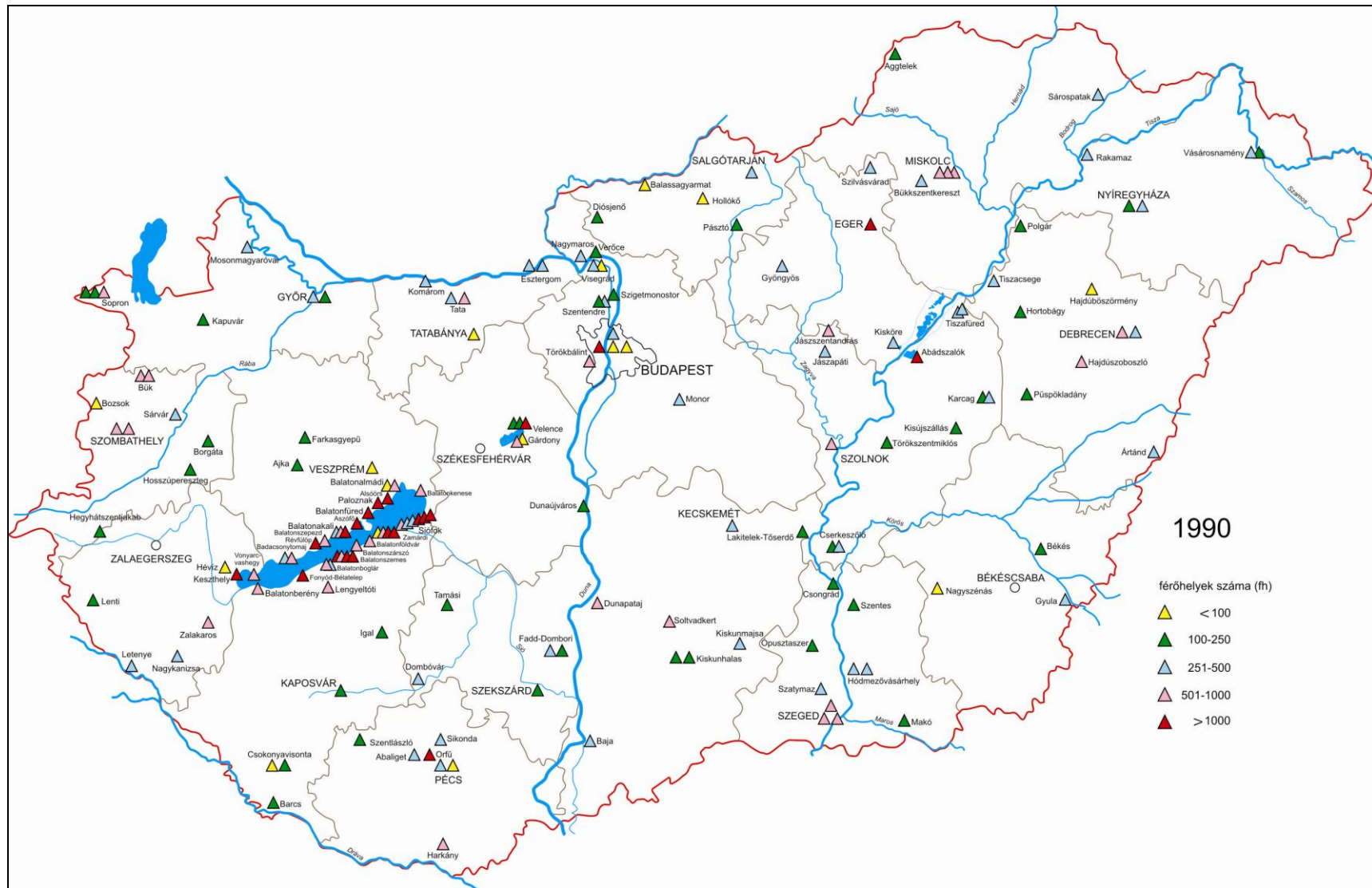
and Tolna Counties (see *Tables 2 and 3*). There were 21 campsites in operation at the county seats with an overall capacity of 5,528 bed-places. However, five county seats (Békéscsaba, Kaposvár, Szekszárd, Veszprém and Zalaegerszeg) had no campsites at all.

The county ranking order based on the number of campsites was led by Zala County with its 24 campsites in 2008, followed by Jász-Nagykun-Szolnok with 22 and Somogy with 20 campsites. By capacity size Somogy was in the lead with 12,447 bed-places, then came Veszprém County with 11,510 campsite bed-places and Jász-Nagykun-Szolnok County took the third place with 6,897 bed-places (see *Tables 2 and 3*). There were altogether 17 campsites at the county seats with a total capacity of 5,350 bed-places. No campsite services were available in Békéscsaba, Kaposvár, Szekszárd and Veszprém.

Table 2 Changes in campsite capacity in Budapest and by county 1990-2008

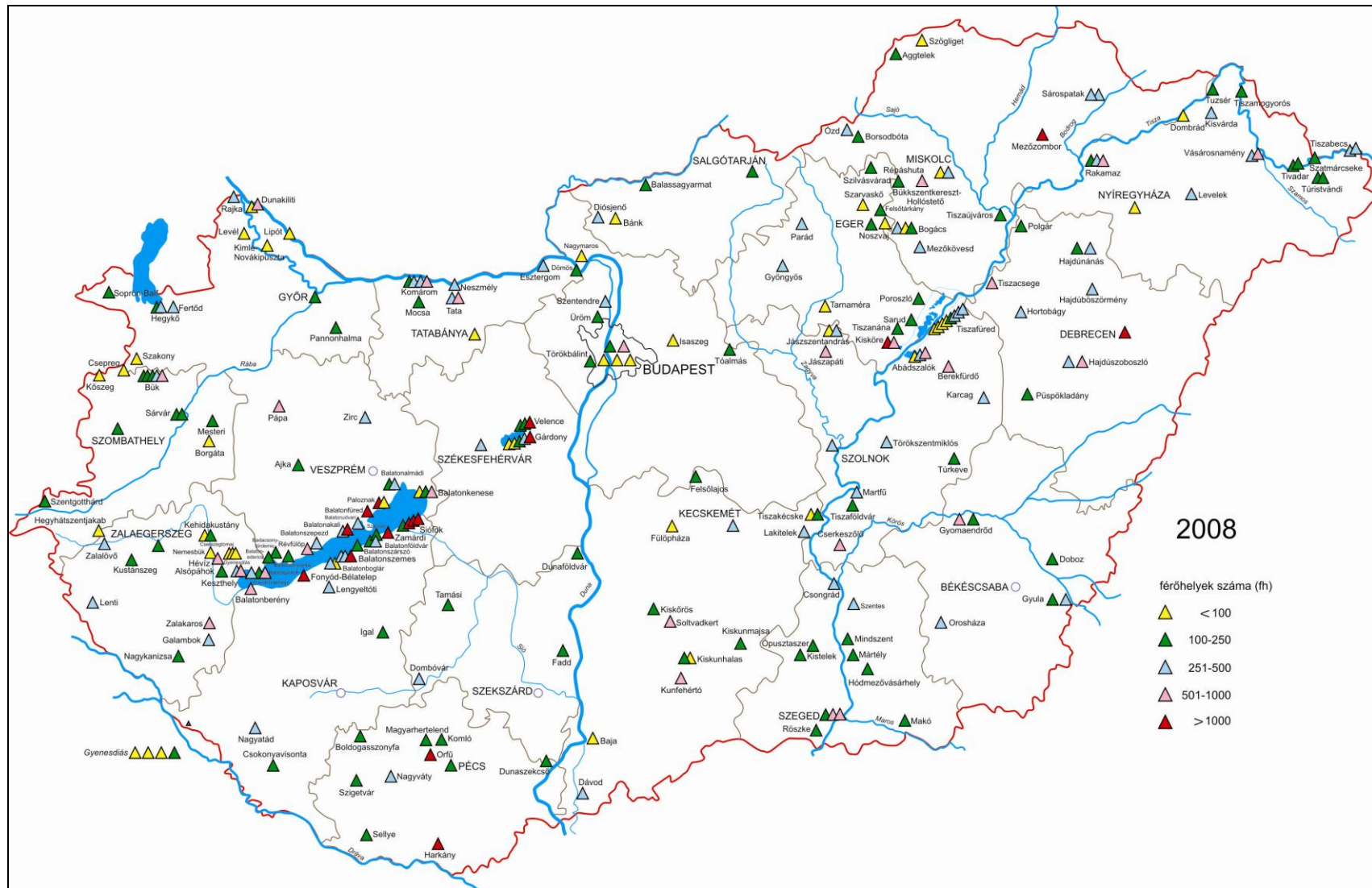
Counties	Bed-places				
	1990	1995	2000	2005	2008
Budapest	3.133	4.157	3.978	870	1.028
Baranya	3.350	4.730	4.710	4.050	5.182
Bács-Kiskun	2.950	4.490	3.710	3.370	3.550
Békés	628	870	825	1.424	1.755
Borsod-Abaúj-Zemplén	3.422	3.654	4.450	4.404	5.365
Csongrád	3.760	2.923	4.127	3.346	2.985
Fejér	3.860	6.574	5.753	4.750	4.156
Győr-Moson-Sopron	2.257	3.320	3.220	8.870	2.725
Hajdú-Bihar	3.931	4.375	3.960	4.986	4.805
Heves	2.600	3.850	2.775	2.775	3.560
Jász-Nagykun-Szolnok	5.482	6.805	7.182	6.034	6.897
Komárom-Esztergom	2.520	3.080	4.625	4.831	3.815
Nógrád	965	1.040	940	620	700
Pest	2.530	3.577	1.712	596	1.005
Somogy	24.253	19.886	17.565	12.953	12.447
Szabolcs-Szatmár-Bereg	1.200	2.890	2.590	2.651	5.475
Tolna	1.250	1.350	1.200	793	1.055
Vas	2.945	3.060	3.672	3.262	3.145
Veszprém	16.890	16.771	17.305	15.160	11.510
Zala	3.540	7.861	8.463	8.391	6.513
Total	97.631	105.263	102.762	94.136	87.673

Source: KSH data and own compilation



Source: KSH data and own compilation

Figure 1 Regional characteristics of campsite locations and campsite capacity, 1990



Source: KSH data and own compilation

Figure 1 Regional characteristics of campsite locations and campsite capacity, 2008

Figures 1 and 2 show the geographic characteristics of campsite locations and capacities registered in the first and last years of the period under review.

Overall, the change in campsite capacity was characterised by an initial growth period (until 1995) and then by a declining tendency, as a result of which by 2008 the total bed-place capacity dropped below the level before 1990. The reason for these changes lies in the transformation of the accommodation structure, especially the spread of hotels and changes in guest requirements. Today both domestic and foreign tourists have a preference for hotel accommodation. Naturally, another reason for the falling numbers of campsite visitors is that some of our campsites failed to respond to the growing expectations of tourists (see regional correlations of quality changes) and to develop their infrastructure and services. Thus these campsites' capacities remained unused and some even went out of business. Finally, social changes also had a role to play in the dwindling popularity of campsites, since that segment of the population which used to go camping in their youth and still carried memories of tent camps and mass accommodation would not take their children to these places. Thus, part of today's youth was not exposed to camping experiences. That process also contributed to the underutilisation of campsite capacities and, ultimately, to their shrinkage.

Regional correlations of quality changes can be summarised as follows:

In 1990, campsites classified into the lower quality category clearly represented the highest proportion. 2-star campsites provided the overwhelming majority of bed-places. We had 11 counties where over 50% of the campsite capacity was offered by these type of campsites. Of them two (Heves and Szabolcs-Szatmár County) had such a homogenous offer in respect of the official categorisation that all their campsites were in the 2-star class. The preponderance of 2-star accommodation was clearly a result of large units concentrated on the Balaton shoreline and had the typical characteristics of the period, i.e. they were huge tent camps with as many as several thousands of bed-places on the waterside with poor infrastructure and very few services. In the capital and five other counties (Baranya, Csongrád, Hajdú-Bihar, Komárom-Esztergom, and Pest) bed-places in 3-star campsites had over a 50% share in the total campsite accommodation capacity.

From the distribution of campsite quality categories it can be concluded that in 1995 2-star and 3-star units had a nearly equal proportion of bed-places (43.1% and 42.2%, respectively) within the overall national campsite capacity. We had nine counties where over half the available campsite capacity was provided by 2-star campsites, and there were now six counties in which 3-star facilities offered more than 50% of bed-places. In Budapest, 93% of the campsite capacity was in the 3-star category. In the same year, there were already eight 4-star campsites, three of which were situated on the Balaton

shoreline (Balatonalmádi, Keszthely and Balatongyörök), two were found in Budapest, and one in Sopron, Alsópáhok and Tiszafüred each.

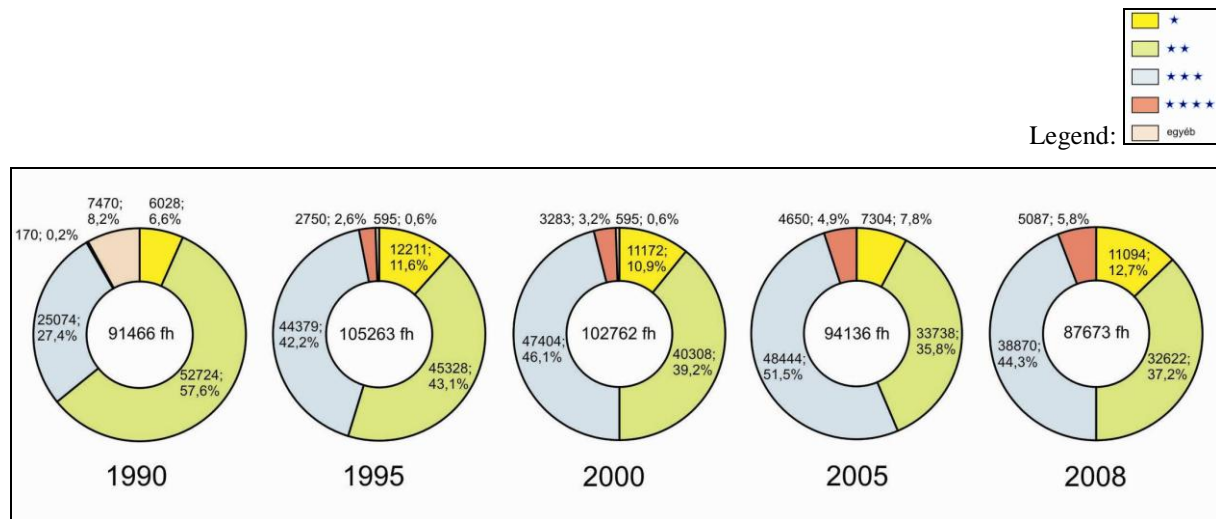
In respect of the overall bed-place capacity in 2000, there was a continued rise in the number 3-star places to stay besides a drop in the number of 2-star bed-places. We still had nine counties where the share of 2-star campsite accommodation exceeded 50%. On the other hand, we now had nine counties with 3-star units making up over 50% of the total campsite capacity. Of these latter campsites six are situated in Transdanubia, so it can be said that in that year the quality standard of campsite supply was higher in the Western part of the country. 79.9% of Budapest's campsites were in the 3-star category.

Of the years under review, 2005 saw the most significant improvement in quality. By that time we had six counties (Csongrád, Heves, Nógrád, Somogy, Szabolcs-Szatmár-Bereg and Tolna) where 2-star campsites reached or exceeded 50% of the total campsite capacity, while in nine counties (Fejér, Győr-Moson-Sopron, Komárom-Esztergom, Vas, Veszprém and Zala in Transdanubia, Borsod-Abaúj-Zemplén and Hajdú-Bihar in East Hungary, and Pest County) 3-star facilities now represented over 50% of county-level supply. In examining 3-star and 4-star, i.e. higher-quality, places to stay the list can be completed with another two counties (Baranya and Békés) where bed-places classified into these categories had over a 50% share of the supply of accommodation. From the above it can be seen that Transdanubia still has the majority of higher-quality campsite bed-places.

Compared to 2005, figures in 2008 unfortunately did not show any further improvement. Except for a few counties, there was even a deterioration of the quality characteristics of campsite capacity. Data on the quality composition of supply showed that compared to 2005 there had been a drop in the number of those counties where 3-star campsite bed-places had a higher than 50% share of the county's total capacity. There were eight of these counties in 2008 (Baranya, Fejér, Komárom-Esztergom, Vas, Veszprém and Zala in Transdanubia, and Csongrád and Pest in the Eastern part of the country). Surprisingly, we found four counties (Győr-Moson-Sopron and Somogy in Transdanubia and Békés and Nógrád in the East) in which 2-star bed-places had more than a 50% share of the total capacity. At the same time there were a number of counties where the volume of 2-star bed-places was nearly half the overall supply, or 1-star bed-places had a very high proportion. Therefore it was worth having a look at the total volume of low-quality supply as well. The examination revealed that in five counties (Bács-Kiskun, Békés, Borsod-Abaúj-Zemplén, Heves and Szabolcs-Szatmár-Bereg) not only half but in fact over three quarters of the overall supply of bed-places were provided by low-quality facilities. In Nógrád County the entire supply of campsite accommodation was in this category. There were four additional counties (Jász-Nagykun-Szolnok, Győr-Moson-Sopron, Somogy and Tolna) where the aggregate volume of 1-star and 2-star units exceeded half the overall county-level supply of bed-places. From all that it can be concluded that

campsites operated in the Eastern part of the country were of a much lower quality standard than those in Transdanubia. In that respect the overall picture did not change. When we look at the aggregate regional characteristics of higher-quality bed-places we can see that yet another county (Hajdú-Bihar) has to be added to the list of those counties where 3-star and 4-star places to stay exceed half of the total bed-place capacity. For, in this county 3-star and 4-star campsite bed-places did also exceed 50% of the overall campsite capacity.

The diagram in Figure 3 show the aggregate data of the distribution of campsite bed-places by quality category.



Source: KSH data and own compilation

Figure 3 Distribution of campsite bed-places by quality category, 1990-2008

In studying the distribution of campsites by quality category I came to the conclusion that the favourable tendency that began in 1990 halted between 2005-2008, for which there could be several reasons. First, the accommodation structure had undergone transformation. Secondly, campsites themselves were upgraded (it is some of the 3-star campsites of all facilities that did not operate because of upgrading). Thirdly, unfortunately land speculation also had a role to play, as a result of which several campsites on watersides were closed down and transformed into other types of facilities (e.g. residential parks). The statistics of the forthcoming years will reveal whether the shift in the overall supply moves in the right direction or whether there is an ever falling number of campsites that can meet today's increased requirements.

Defining the role of campsites in the domestic accommodation structure

As a starting point it should be stated that campsites have a substantial supply of 90,000 bed-places to offer to tourists in a period where, due to the seasonal nature of our tourism sector, we have the most foreign visitors in our country.

However, my examinations during the research have revealed that campsites unfortunately had a declining share in both the number of guests and total bednights spent at commercial places of accommodation as from 1990. The greatest drop in guest volumes occurred between 1990-2000, in which period the number of guests fell to below and bednights dropped to nearly half (52%) the initial levels. In the meantime, campsites showed steady development (with slight undulations) in terms of capacity, with their number nearly doubling (from 165 to 319) and bed-place numbers going up from 97,631 to 102,562. Overall, this process was not the result of campsites losing ground but it also had to do with the dynamic development of other types of accommodation, such as hotels, pensions and tourist hostels. In the case of holiday homes, similarly to campsites, the number of units rose significantly but the number of bed-places only moderately. Youth hostels emerged at the end of the decade as part of the supply of accommodation, and by definition their number was soaring. The spectacular development of the different types of accommodation (a 38% increase in the number of commercial bed-places across the country compared to the 1990 level) resulted in, as a natural consequence, a wider range of options for guests, which in part could also be a contributing factor to the decline in the volume of campsite customers. However, between 2000-2008, apart from hotels and holiday homes, bed-place capacities fell in all types of accommodation while the number of bednights spent at hotels and pensions grew. While in the early 2000s the number of campsite guests around 400,000 it began to shrink as of 2004. Although in the past couple of years there was a modest growth, guest numbers were lower by 7.3% in this period. In respect of bednights, the situation was even worse. Between 2000-2008 the overall decline was 27.2%.

In summary, the past nearly 20 years saw a very large reduction in the guest volumes of campsites while the available bed-place capacity only fell by 10.2% compared to the initial upward trend.

Defining a vision for developments

In my research I formulated the following recommendations:

- Build capacity, not in terms of the overall capacity but in respect of particular regional units, with a focus on technical development, the use of alternative sources of energy and expanding the range of different types of bed-places within campsites (e.g. mobile homes).
- Improve quality standards. Specialise in a particular thematic area (e.g. thermal or medicinal campsites) or a particular age group. Raise campsites' hygienic standards.
- Widen the range of services. Expand the range of programmes and strengthen the role of facilities linked to water.

- Increase the customer base. Reach out to younger age groups and lovers of active tourism. Attract environmentally conscious customers by using alternative sources of energy.
- Change the old image of campsites held by the domestic population. Using the new quality certification system of professional organisations grant quality awards as a guarantee of quality. Build a positive image by using green energy sources. Emphasise informal lifestyle opportunities in campsites.
- Turn campsites into touristic products. Use relaxed and informal lifestyle, high-quality services as main attractions of the campsite as a product.

4 FURTHER DIRECTIONS OF THE WORK

For further research in the subject area different levels of study can be identified, which later will be built on each other.

One level is regional research, whereby regional connections can be explored, specifically:

- In order to improve the range of bed-place options in individual tourist regions it is worth exploring the role of campsites in the accommodation structure and guest volumes in each region and assess the state of their supply based on the level of their facilities and services. It is necessary to define regional visions.
- For increasing the customer base there has to be a regional-level analysis of clientele covering the distribution characteristics of both domestic and foreign guests including the breakdown of the foreign customer base by country and that of domestic guests by sending region.
- The features of campsites' specialisation need to be explored at national and regional levels to provide direction for planning development measures.

The other level of research targets social changes with the goal of exploring campers' and non-campers' sociological characteristics, namely:

- There should be an assessment of the campsite image held by the domestic population. The findings can help change the existing image.
- Examining campers' sociological composition can reveal the extent to which Hungarian society has recognised and need the opportunities of an informal lifestyle offered by campsites in more developed regions.
- Research should be conducted on environmental consciousness in campsites' services and campers' attitudes.

The third level of research could be directed at methodologies in order to help campsites work out statistical data collection regimes and data processing structures.

5 LIST OF PUBLICATIONS AND CONFERENCE PRESENTATIONS

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