

Tourism

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Situational Analysis

In Somogy County relatively stable development based on tourism has been experienced in the area of the Lake Balaton Priority Recreational District. However, tourist turnover has strong seasonality, and its decreasing volume causes employment and profitability problems in the exclusively tourism-based economy.

The Southern part of Lake Balaton is one of the core tourist regions of the Southern Transdanubian Region and it is located in the county. The main attraction of the county is the lake and its surroundings. Despite all of these, the weight of tourism sector is minor in Somogy County, including investments and employment.

Economic sector	Total investments	%
Industry	15 111	28.83%
Construction	4 389	8.37%
Commerce and vehicle servicing	2 425	4.63%
Transportation and warehousing	9 857	18.80%
Accommodation services and catering industry	949	1.81%
Public administration, defence; compulsory social security	3 978	7.59%
Education	850	1.62%
Health and social care	1 776	3.39%
Total	52 418	100.00%

1. Table Investments of the organizations of the economic sectors [million HUF] (HCSO, 2013)

Two conflicting processes can be observed regarding the internal and foreign tourist turnovers. While the number of foreign tourists continuously decreased in the past decade, the home tourism constantly increases in every year.

Although at the other side of the border in Croatia there are potentials as a touristic region, touristic infrastructure and activities are at a low level.

The cultural and natural features of Somogy are favourable for the development of tourism. Thanks to this, tourism plays an important role in the county's economic life.

Tourism in the county is extraordinarily concentrated in regional terms with the Siófoki, Balatonföldvári and Fonyódi micro regions alongside Lake Balaton accounting for 90% of the region's bed places and tourism nights.

Tourism is essentially influenced by the transport accessibility of the county.

Priority Regions

Region of Lake Balaton

Tourism of the county is primarily concentrated on the settlements near the shore of Lake Balaton. Lake Balaton is the number one destination of the county and the second largest major tourist destination in Hungary; it is also a leading tourist destination of the South Transdanubian region as well. The main attraction of the area is the existence of the natural waterfront, which gives an ideal opportunity for the classic waterfront recreation; but one can find a large number of service providers of active recreational opportunities (sailing, cycling,

fishing, horse riding, etc.). Somogy County has the worst statistical data regarding the number of guests, proportion of foreign visitors out of the 3 counties belonging to the Lake Balaton Resort Area; the share of tourism (number of guests) of the background settlements is negligible. One reason for that the proportion of spa and wellness hotels in the county popular with hotel guests is low.

On the basis of the findings in the Lake Balaton Region Development Strategy, the following tourism products are present in the Lake Balaton Region at this time: water tourism (passive waterside recreation, active waterside recreation – sailing, angling), active tourism (pedestrian trekking, bicycle tourism, equestrian tourism), health tourism, wine tourism, cultural tourism and conference tourism. Lake Balaton is a declining destination with very strong seasonality as the length of the peak season is limited to 4-6 weeks.

The vast majority of the Balaton ports boating as a sport is determining as well. The demand for sailing is increasing gradually, so the need for the development of new yacht harbours is constant. Operating an internal combustion engine powered boat on Lake Balaton is prohibited, except for special reasons (e.g. police, etc); on the one hand there are environmental reasons, but this prohibition also helps to preserve the landscape, atmosphere, nature and values of Lake Balaton.

Drava River and the Border Region

Drava area is home to rare and amazing biological diversity and it has floodplains, forests, isles, sandbanks and backwaters.

After the accession the situation eased, but border control is still strong; licensing from DDNP and the lack of tourism facilities means that the river area has been hugely underutilised so far, resulting in a dearth of serious tourism related revenue for the micro regions in the border area. With regard to the numerous spas in the county, there is also great potential for thermal and medical tourism.

In order to mitigate the existing separating impact of the Drava as a border river, the cooperation of the local communities could be helped through building on the maintaining the local tradition with the participation of the mixed ethnicity population on both sides of the border, creating the infrastructural and organisational potential of activities and programmes for the local (Drava-regional) identity awareness raising.

Besides development planned in the framework of large-scale regional programmes, the benefits of serving new markets on micro-regional level as a result of the accession of Croatia should be used more, primarily expanding the trading and tourism facilities of the settlements along the border (including the development of the market for local products) and especially developing the health tourism and tourism services of the spa and thermal baths favoured by the population living in the settlements along the border.

In the field of tourism cooperation it is essential to visualize the Drava Region as a single, compact tourism destination, development of joint cross-border tourism product packages, development of a common tourism information database, joint tourism management, marketing and unified image on the markets.

Tourism Sectors

Active and Ecotourism

The hilly and woody areas of Somogy County has a good potential for environmentally oriented tourism such as eco-, water-, and several other kinds of active tourism (mounted tours, cycling, hiking, hunting). A certain amount of these branches of tourism already exist in the region, especially in the Danube-Drava National Park (DDNP).

The vast forests have high-quality stocks of wild animals, which create the basis of hunting tourism (Zseli, Kaszó).

The Drava River forms the southern border of the county, and its total length is covered by the Danube-Drava National Park, offering the possibility of an eco-and water-based tourism (in Kis-Balaton region, the Balaton Uplands National Park also affects areas of Somogy), the county is intersected by the path of the “blue tour” which is a torustic path with national importance, and two pilgrimages (Andocs, Segesd) also can be found in the county. The cycling infrastructure of the county is underdeveloped; settlements are not connected. Consistent tracks only exist around the shore (Lake Balaton Bike Path).

Bike paths and facilities do not form a network within the settlements, not even in Kaposvár; safe bicycle outdoor storage is also a problem. Implementation of a small-scale network development programme for the area of Kaposvar is in progress. These factors hinder the development of the increasingly popular bicycle tourism.

Rural, Cultural and Religious Tourism

The hundred years old theater of Kaposvár is not enjoying the former national fame nowadays, but offers high quality and diverse performances for the audience of the county. Towns near the lake - especially out of season – primarily summer theater programs are organized. In the small villages of Zselic region rural tourism plays an important role, and it is complemented by the hunting and cycling tourism, and eco-, water-, and active tourism along the Drava River.

The Village Museum in Szenna shows Somogy folk architecture and culture. The grange in Szántód-puszta represents a significant cultural and touristic value. The Benedictine Abbey in Somogyvár has been declared as a national monument and a development of half billion HUF will soon begin. There are more than a hundred of manor houses and casteles in the county; after proper reconstruction some of them could become a place for cultural programmes. A considerable number of festivals are organised on an annual basis in the county. The youngest of them is Chamber Music Festival of Kaposvár (in August) has become internationally famous. In the area of sports Kaposvár Youth Football Festival has also an international reputation and it is held annually in summer. The "City of Painters" festival related to Rippl-Rónai's birthday is well-known on the national level held in Kaposvár in May each year. The farming-related exhibitions of Kaposvár University are the representatives of agricultural culture. A unique cultural element in Somogy, the horseback archery in the valley of Bárdudvarnok is related to Lajos Kassai. The traditional Hungarian

horse culture is cultivated more and more places. Krishna Valley is an exotic specialty in Somogyvámos.

The underdeveloped state, condition and usage of cultural sites, the cultural interest and cultural level of residents are the consequences of the economic underdevelopment, but the values bear a lot of potential exploitation.

Wellness- and Thermaltourism

One of the significant tourism sectors of Somogy is the utilisation of thermal water in baths. Kaposvár, Igal, Marcali, Nagyatád, Barcs and Csokonyavisonta have baths of national or regional importance while Buzsak-Csisztapuszta, Nagybjom, Babócsa, Csurgó and Tarany have local significance. Stakeholder analysis contains detailed information on the main baths.

Area	Bath types							Number of visitors (1000 persons)	Average number of visitors (1000 persons)	Average revenues from spa services (million HUF)
	Spa	Thermal bath	Pleasure bath	Plage/beach	Swimming pool	Training pool	Other baths			
Baranya County	6	6	12	13	7	11	–	1 640	55	43
Somogy County	4	7	20	14	10	15	5	1 279	30	16
Tolna County	2	4	6	7	2	5	–	451	32	19
South-Transdanubia	12	17	38	34	19	31	5	3 370	39	26

1. Table: The main features and attendance of baths, and services offered (2012, KSH)

Wine- and Gastrotourism

Gastro-tourism exhausts in a variety of gastronomic festivals in the county; in top category Chateau Víz should be mentioned: the luxury hotel – according to the company's website -, is the gastronomic acropolis of the South Transdanubian area. Chateau Víz gourmet restaurant has been voted the 'Best of Budapest & Hungary in 2013 and 2012' despite of the fact that it is located an hour away from Budapest. The restaurant was elected into Central Europe Top 20 Restaurants in 2012 according to the American 'Food and Wine', and was marked the "Restaurant of the Year" according to the rating of the 'Dining Guide' in 2010.

The wine region in Balatonboglár has everything for wine tourism.

Factors are favorable regarding transport; the area of Lake Balaton is rich in accommodation and service providers. The tourism of the county can benefit from wine tourism season which is much longer than the waterfront season, and this can help alleviate seasonal fluctuations.

Accommodation

Number of visitors in public accommodation of Somogy County in 2013 can be characterised by an increase over the national average compared to the previous year's data. Both the number of visitors to the county and the number of guest nights exceeded the values of the previous year.

Area	2010	2011	2012	2013
Baranya County	255 404	237 503	249 765	262 041
Somogy County	434 139	444 335	482 196	522 444
Tolna County	60 315	67 276	71 797	73 858
South Transdanubia	749 858	749 114	803 758	858 343
Hungary	7 473 339	8 021 069	8 385 169	8 829 705
Of which: foreign				
Baranya County	54 361	42 694	43 136	45 034
Somogy County	96 646	88 999	98 749	99 941
Tolna County	8 566	8 061	8 352	8 836
South Transdanubia	159 573	139 754	150 237	153 811
Hungary	3 462 021	3 821 751	4 163 641	4 377 792

2. Table: Number of visitors in public accommodations (KSH)

The number of domestic visitors increased by 10%, while the number of people coming from abroad barely rose compared to 2012. The number of guest nights was close to 1.5 million, which means a 6% increase. The number of foreign guest nights decreased by 4.1%, while that of domestic rose by 9.6%. The places of foreign guests took over by Hungarian ones.

Area	2010	2011	2012	2013
Baranya County	600 731	547 752	597 783	660 710
Somogy County	1 302 167	1 259 633	1 388 072	1 470 833
Tolna County	137 933	147 647	156 966	171 144
South Transdanubia	2 040 831	1 955 032	2 142 821	2 302 687
Hungary	19 554 438	20 615 517	21 805 200	22 798 949
Of which: foreign				
Baranya County	164 766	142 125	138 606	155 520
Somogy County	382 669	324 270	366 494	351 437
Tolna County	23 837	21 698	22 227	23 687
South Transdanubia	571 272	488 093	527 327	530 644
Hungary	9 613 728	10 410 774	11 392 183	11 920 055

3. Table: Number of nights spent in public accommodations (KSH)

Over the past 13 years' time it is heartening that the number of visitors has increased steadily. The same trend has not enforced for guest nights spent in the county. Visitors have spent less and less time in the county's public accommodation. Under the influence of these two indicators, the average length of stay decreased by two-thirds between 2000 and 2013.

Area	2000	2005	2010	2013
Baranya County	2,7	2,4	2,4	2,5
Somogy County	4,3	3,5	3,0	2,8
Tolna County	2,7	2,4	2,3	2,3
South Transdanubia	3,7	3,0	2,7	2,7
Hungary	3,1	2,8	2,6	2,6

4. Table: Average time spent in public accommodations [nights] (KSH)

The county welcomes most of its foreign visitors (more than 50%) from German speaking countries (Austria, Germany).

Country	Visitors		Visitor nights		Average length of stay (nights)
	number	same period of the previous year = 100%	number	same period of the previous year = 100%	
Foreign, total	99 941	101,2	351 437	95,9	3,5
Of which:					
Europe	97 365	100,8	344 659	95,4	3,5
European Union	82 461	97,7	303 838	93,1	3,7
Of which:					
Germany	28 324	89,5	143 113	86,3	5,1
Poland	10 514	121,1	26 362	121,7	2,5
Austria	9 330	82,3	27 392	73,9	2,9
Russia	8 205	148,1	24 004	130,7	2,9
Czech Republic	6 429	98,4	21 901	99,4	3,4
Netherlands	5 171	113,7	24 886	111,8	4,8

5. Table: Number of foreign visitors by countries (KSH, 2013)

In general, between 2000 and 2013 the interest of foreign visitors in our country has flagged, as the number of guests decreased by 50% and the number of nights spent dropped to one-third. In 2013 the highest percentage of visitors (28%) visited the county from Germany and booked accommodation for an average of 5.1 nights. In the county, one in ten foreign tourists arrived from Poland, but they lingered only half as much time in the county compared to the German visitors. Austria, Russia, Czech Republic and the Netherlands are also significant part of the tourism in the county. Visitors of these countries represented 5% or more of tourists, and spent an average of 3.5 days in the county's accommodation establishments. Besides the outdated, low-quality hotels of the past decade now the supply has been supplemented with wellness and conference potentials; these now to meet higher classification requirements of a higher category. Getting away from the lake, the quality and the number of accommodation is decreasing. Exceptions are the five-star Hertelendy Castle

in Kozmapusztá and Chateau Visz in Berencsepusztá; these are the country's few rural accommodations in such categories. There is no high quality and big capacity hotel in Kaposvár.

The utilization capacity of the accommodations in Somogy was an average of 37% for rooms and 25% for number of visitors in 2013; which – compared to the base period – proved to be by 15% and 11% more, but the national averages (according to the previous ranking by 42% and 27%), have not been reached. Somogy with its modest capacity indicators defeated 12 counties regarding the utilization of rooms, and 14 counties regarding the utilization of beds in the ranking of counties.

Significant settlements of Lake Balaton in terms of tourism:

Megnevezés	Visitors	Of which: foreign	Guest nights	Of which: foreign	Visitors	Guest nights
Balaton Resort Area	1 353 566	26,20%	4 603 674	38,50%	104%	103,90%
Of which: Somogy	30%		24%			
Siófok	249 199	24,20%	670 224	30,20%	108%	107,20%
	18%		15%			
Balatonszemes	53 473	14%	160 496	21,80%	109,90%	107,30%
	4%		3%			
Zamárdi	36 677	21%	100 974	29,70%	100,80%	90,10%
	3%		2%			
Fonyód	29 487	9,80%	96 611	8,40%	79,50%	83,20%
	2%		2%			
Balatonföldvár	31 353	14,40%	86 733	15,10%	127,10%	122,40%
	2%		2%			

6. Table: Visitors' data in terms of tourism in the significant settlements of Lake Balaton, 2013 (Data of public accommodation) (KSH Statisztikai Tükör)

The number of tourist nights shows an increasing trend; however, in the number of foreign visitors decrease, thus the role of domestic tourism is increasing in the county. Tourist nights in hotels compared to the previous year increased by 6% in 2013. The number of foreign tourist nights spent in Somogy County, however, fell by nearly 5%. In case of hotels foreign tourist nights spent decreased by 10%. This is due to the fact that foreign tourists spend by 5% less time in the county (an average of 3.5 nights). The reason for this might be that the structure of tourism is restructuring regarding the country of origin. While the number of German and Austrian tourists fell by nearly a tenth, the number of Russian and Polish tourists rose, though their length of stay were shorter. Regarding foreigners' staying in hotels on average they still spend more time in hotles than domestic tourists (3.5 nights compared to 2.6 nights). However, the time spent in guesthouses increased among foreigners and Hungarians as well, which certainly has financial reasons. It is also can be seen that tourists spend slightly more the in guesthouses than in hotels. However, the importance of guesthouses can not be overestimated, because they bear the less than a tenth of the capacity of the hotels.

	Foreign	National	Total	Foreign	National	Total
				same period of the previous year = 100%		
Number of visitors						
Total	99 941	422 503	522 444	101,2	110,2	108,3
Of which: Hotel	58 356	270 366	328 722	101	117,9	114,5
Guesthouse	4 726	31 473	36 199	114	132,5	129,8
Number of guest nights						
Total	351 437	1 119 396	1 470 833	95,9	109,6	106
Of which: Hotel	179 371	683 429	862 800	90,8	119,4	112,1
Guesthouse	15 173	82 371	97 544	113	138,5	133,8
Average length of stay, nights						
Total	3,5	2,6	2,8	94,7	99,4	97,8
Of which: Hotel	3,1	2,5	2,6	89,9	101,3	97,9
Guesthouse	3,2	2,6	2,7	99,1	104,5	103,1

7. Table: Traffic of public accommodations by type of accommodation (KSH, 2013)

Due to strong seasonality less than 20% of the places available throughout the year, most of the hotels are open only in the high season.

Stakeholder Analysis

Regional development Organisations

Southern Transdanubian Regional Development Agency

Being the Intermediary Body of the South-Transdanubian Operational Programme, the Agency is responsible for the management of EU funded regional development programmes. Between 2007-2013 the Agency supported the implementation of 904 projects and the use of 241.7 billion HUF. The Agency has wide experience in the field of local development programmes which is a good basis to further build on. Besides, there is a room for cooperation in case of cross-border projects.

Council for Balaton Development and Non-profit Balaton Integration Ltd.

The main task of the Council for Balaton Development is to define the development objectives of the area in cooperation with all the stakeholders of the region, to promote the elaboration of development programmes and projects in the designated area of Balaton Priority Recreational Area and also to coordinate and enhance the water management, touristic and economy development investments by means of the available financial development resources in order to support the economic development of the region.

The main objective of the Council is to secure the development of the region by means of providing a single incentive and supporting system as well as the implementation of individual programmes in cooperation with the statistical planning regions and governmental

bodies. In course of the planning and implementation period of the programmes, the Council formulates and represents the common opinion of the stakeholders of the region's development.

Tourism Destination Management (TDM) organisations

These associations gather various stakeholders of tourism aiming at improving the cooperation of local service providers and implementing coordinated touristic programmes. Due to the former, the importance of the organisations is significant as they can contribute to the touristic competitiveness of the given region.

Existing TDM organisations in the county:

- Kaposvár and Zselic region TDM Association
- Touristic Association of Balatonfenyves
- Touristic Association of Balatonföldvár Micro Region
- Touristic Association of Fonyód
- Touristic Association of "Siófoki Fürdőegylet"
- Touristic Association of Balatonmáriafürdő-Balatonkeresztúr
- Touristic Association of Balatonszárszó
- Touristic Association of Nagyatád-Rinyamente

Upper category hotels

There are several high category reputable castle hotels in the county, out of which the two most significant are:

Chateau Visz

Chateau Visz¹: according to the website of the luxury hotel the Chateau is the stronghold of the gastronomy in Somogy County. The gourmet restaurant of Chateau Visz has won the "Best of Budapest & Hungary 2013 és 2012" award, despite of the fact that the hotel is half an hour drive from Budapest. Out of the Top 20 restaurants of Central-Europe, its restaurant is on the European top list of the "Food and Wine American" professional gastro magazine in 2012; the evaluation of Dining Guide has awarded the restaurant as the "Restaurant of the Year". Besides gastro tourism, the hotel is famous for its wellness services as well.

Castle Hertelendy

The five-star Hertelendy Castle² successfully won the 2012-2013 international appreciation of hotels in three categories: "Best Resort Hotel Europe", "Best Resort Hotel Hungary", "Best Small Hotel Hungary". In the hotel there is a gourmet restaurant while wellness and leisure services are also provided. A private airstrip is one peculiarity of the castle which can be used by powered aircrafts, helicopters and gliders as well (free of charge).

¹ <http://chateau-visz.com/>

² <http://www.hotel-hertelendy.com/>

Notable spas

Barcs Spa and Recreation Centre

Its 55 ° C, sodium bicarbonate water reaches the surface from 1317 meters depth. This water is mostly used for musculoskeletal disorders and inflammations.

Csiszta Spa

Csiszta Spa – 5 km distance from Buzsák – is visited due to its 42 ° C thermal water rich in hydrocarbonates, minerals, sulfur and also carbonic acid. Its composition is suitable for healing musculoskeletal and rheumatic disorders, gynecological, intestinal and stomach problems. The Thermal Bath Directorates has declared the thermal water of Csiszta to be medicinal water.

Health Spa and Camping Csokonyavisonta

Its water - rich in alkali bicarbonate, iodide, fluoride and silicic acid - was discovered in 1943 during an oil exploration. This water is used for healing heartburn, indigestion, functional bile, constipation, degenerative spinal disorders, chronic gynecological problems, kidney disease and musculoskeletal problems.

Igal Health Spa

The spa has been operated since 1964, its thermal spa certification was obtained in 1991 due to its iodine thermal water rich in alkali chloride and bicarbonate. It is mostly used for healing musculoskeletal problems, circulatory disorders after serious injuries, arthritis and gynecological problems, urological diseases and elderly loss of potency.

Kaposvár Swimming Pool and Health Spa

This hotel is used to be called “Virágfürdő” (Flower Bath). Its thermal water was discovered in 1960, and the bath opened in 1969. Its mineral water of alkali chloride and bicarbonate is feeds the pools with high bromine, iodine or fluorine ion content. The water used for healing musculoskeletal disorders, rheumatic condition after thrombosis, muscle strains, muscle weakness, fractures and cartilage injuries. It is also suitable for after-treatment of accident injuries and gynecological problems.

Thermal Spa and Leisure Center in Marcali

The Spa can be found in the northern part of the town in a man-made park of 80.000 m².

The Bath has a 50 meter long swimming pool, slides, children’s pool as well as thermal and medicinal pools. The Bath opened its doors in August 2003 and further developments have been implemented since then. The indoor training pool opened in 2009, which allows the Bath to be open throughout the whole year. The Bath was granted in 2010 from national and EU funds.

Thermal and Medicinal Spa of Nagyatád

The Spa was refurbished in 1997 in the park of Széchenyi Square. In the covered part there are 32, 38 and 42° C thermal pools and baths. The water is used for healing rheumatic and rheumatoid arthritis, post-fracture rehabilitation and gynecological problems. The Thermal Bath – capable for 2000 people – opened in 1989 in the northern part of the town. The

competition pool with stretched water surface and heated with thermal water is suitable for organizing competitions as well as training camps well.

National parks

Duna-Dráva National Park Directorate

Duna–Dráva National Park was founded in 1996, merging several protected areas. The Park is covering an area of some 50.000 hectares. The Operational area of the Danube-Drava National Park Directorate responsible for the National Park covers the entire territory of Baranya and Tolna County, Somogy County except the south waterfront of the lake, and to a lesser extent to Fejér County and Bacs-Kiskun County as well. Several areas of the Park affect Somogy County: Dráva Plain, Barcsi Juniper Forest, Lankóczi Forest and the Zákány-Órtilos area. The Directorate also responsible for the following countryside and conservation districts: Boronka-Melléki Protected Area, Zselici Protected Area, Babócsa Basakert Conservation Area, Lake Baláta Lake Nature Reserve and Forest Reserve, Woody Grassland Conservation Area in Csokonyavisonta, Meadow Conservation Area in Csombárdi and the forest Nature Reserve in Rinyaszentkirály.

Balaton Uplands National Park Directorate

A smaller part of the county is affected by the Balaton Uplands National Park. Balaton Uplands National Park was founded in 1997 and covers an area of 57,019 hectares. It was made up of six former landscape protection zones. Three nature reserves of the park is situated in Somogy: Látrány-Prairie Conservation Area, Nagyberék White-Water Nature Reserve and Kupavár Mountain Nature Reserve in Somogyvár.

SWOT analysis

Strengths	Weaknesses
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<ul style="list-style-type: none"> → The main attraction of the county is the Lake Balaton and its surroundings. → Home tourism constantly increases in every year. → Natural environment, mineral and thermal water are considered significant attractions. → In the small villages of Zselic region rural tourism plays an important role. → The vast forests have high-quality stocks of wild animals, which create the basis of hunting tourism (Zseli, Kaszó). → The wine region in Balatonboglár has everything for wine tourism. → One of the significant tourism sectors of Somogy is the utilisation of thermal water in baths. → The county has two five-star chateaus. <p>Useful cultural values in tourism:</p> <ul style="list-style-type: none"> → Theatre of Kaposvár → Summer theatre programmes on the shore of Lake Balaton → Village Museum in Szenna → Benedictine Abbey in Somogyvár <p>Elements that increase the touristic attraction of Kaposvár:</p> <ul style="list-style-type: none"> → Chamber Music Festival Kaposvár → Youth Football Festival → "City of Painters" festival in May each year 	<ul style="list-style-type: none"> → The weight of tourism sector is minor in Somogy County, including investments and employment. → The number of foreign tourists continuously decreased in the past decade. → The intertwining and coherence of the county tourism program elements and cooperation among the players in the tourism are missing. → The whole county is characterised by seasonality, it is especially a serious problem around Lake Balaton. Due to strong seasonality, less than 20% of the places available throughout the year, most of the hotels are open only in the high season. → The proportion of spa and wellness hotels in the county - popular with hotel guests - is low. → There is no high quality and big capacity hotel in Kaposvár. → The cycling infrastructure of the county is underdeveloped; this hinders the development of the increasingly popular bicycle tourism.
Opportunities	Threats
<ul style="list-style-type: none"> → The cultural and natural features of Somogy are favourable for the development of tourism. This is especially true of the River Drava region and of Kaposvár. → Gastro-tourism is currently underutilized in the county; this area could be exploited in the future; for example in the framework of cross-border co-operation, or on the basis of the wine region of Lake Balaton. 	<ul style="list-style-type: none"> → Tourist turnover has strong seasonality, and its decreasing volume causes employment and profitability problems in the exclusively tourism-based economy. → Weather seriously affects county tourism, especially outdoor activities and the length of the season. This is especially true in the recreational area of Lake Balaton.

Identification of Key Challenges

The intertwining and coherence of the county tourism program elements and cooperation among the players in the tourism are missing – though as a result of the establishment of local tourism destination organisations and primarily the regional tourism clusters there is a noticeable shift in the last few years (it would be fruitful to work together with the Croatian side in this field as well).

The whole county is characterised by seasonality, it is especially a serious problem around Lake Balaton, given that along the shore the contrast is significantly higher regarding programme features and guest traffic within the high season and beyond the season than in the southern areas of the county. This also refers to the concentration of tourist attractions.

Tourist turnover has strong seasonality, and its decreasing volume causes employment and profitability problems in the exclusively tourism-based economy. This constantly present fluctuation should be reduced by the need to increase tourism in other areas. Due to cultural and tourist assets it mainly depends on the investments and potential foreign and domestic demand. Particular areas for exploitation in the county are the region along Dráva or Kaposvár, but we should also mention the numerous thermal and medicinal baths in the county. Obviously, the amount of tourism like at Lake Balaton can be reached, but the mid-year seasonal variation could be reduced. Also, seasonality is the reason that the municipalities of Lake Balaton struggle with significantly fluctuation in economic output and employment. The Balaton-season is weather-dependent, cannot be extended. During the year, unused capacities are partly occupied by accommodation suppl for hospitality conferences and trainings to curb local players.

Gastro-tourism is currently underutilized in the county; this area could be exploited in the future; for example in the framework of cross-border co-operation, or on the basis of the wine region of Lake Balaton. In Balatonboglár wine region everything is given for wine tourism. The proportion of spa and wellness hotels in the county - popular with hotel guests - is low. This issue also features the advanced Balaton area, but in the rest of the county it causes more barriers. There is no high quality and big capacity hotel in Kaposvár, therefore capacities of tourism are limited.

It is worth mentioning that the county's cycling infrastructure is underdeveloped, it hinders the development of bicycle tourism which is becoming increasingly popular.

- 1. Tourism of the county is excessively Balaton-centered, the Drava area, however, almost unexploited.**
- 2. The whole county is characterised by seasonality, it is especially a serious problem around Lake Balaton.**
- 3. Gastro-tourism is currently underutilized in Somogy County.**
- 4. The intertwining and coherence of the county tourism program elements are missing**
- 5. The proportion of spa and wellness hotels in the county - popular with hotel guests - is low.**

Cross-sectoral Linkages

Environmental Protection

The County has an outstanding opportunity regarding the development of tourism by the abundant and diverse natural and architectural offers.

Due to the expansion of regionalism the collaboration with the neighbour counties has been deepened, especially with Baranya County. Under this cooperation, the following projects were implemented: Drava project; Complex ecotouristic development of the Drava-basin; Ancient Drava Programme. The Somogy part of the Drava-Basin and the river belongs to one of the most untouched natural territory of Hungary (part of the Duna-Drava National Park).

Beside the area's own value, it also provides excellent opportunity for fishing-, hunting- and water-tourism. Processing of forest products can become a part of local economies and through this the employment rate of the territory may be improved.

Agriculture

Wildlife management, wine production and forestry are the main fields which provides linkage between agriculture and tourism.

In the context of wildlife management, a better organisation of the multiple utilisation is needed.

Transportation

The link between the transportation and the tourism sectors is significant. Access time of the different tourist destinations are significant factor for the county's tourism. Transportation is the bottleneck itself for the industry and agriculture of the county and it applies to the tourism as well.

Motorway M7 has an important international role and it is a significant element of the Hungarian public road system: it supports the quick availability of Lake Balaton and beside this fact M7 helps to reduce the traffic in the settlements, situated on the lake's bank; the environmental quality of the summer resorts is protected. The motorway's junctions are allocated well, so the good availability of the 50 km long holiday resort zone is ensured. There is a good opportunity of the further development of the so called 'background territories' (the inner part of Somogy). However, other parts of the County – which are situated far from the motorway – can be approached hardly and because of this fact these areas are less attractive destinations. Kaposvár, Külső-Somogy, Drava-basin can be reached just via main roads. Poor quality of the railway infrastructure and slow speed of trains hinder the touristic development of non-Balaton territories of Somogy. Beside this, River Drava –as the only fluvial transportation corridor of the County – has a significant potential in water-based tourism.

Sport-sailing is important at most of the ports of Lake Balaton. Demand for sailing increases progressively, so the claim for new sport-sailing ports is continuous. It is not allowed to use internal combustion engine-driven small boats and boats, the only exceptions are the authorities, they can use their motor-driven vehicles. The reason of the prohibition is environment protection on the one hand, but on the other hand it is important because of the preservation of the landscape, and the original Balaton-feeling as well. The County's bicycle road infrastructure is undeveloped, that's why the development of the popular cycle-tourism is pulled back.

Three narrow gauge railways have a touristic importance in Somogy. One of them is located at Lake Balaton, between Balatonfenyves and Csiszta thermal spa. Slide-line goes to Táska and Somogyszentpál, but it is out of operation. Regularly operating passenger rail runs between **Balatonfenyves** and **Somogyszentpál**, which operates outside of the touristic season as well. This side-line is not just for tourists and it is under construction at the moment. On the territory of the Boronka-area Landscape Protection Area, there is another narrow gauge railway between the villages of **Mesztegnő** and **Felsőkak**; it is just 9 km long. Nowadays it has only touristic function and it had been completely renewed by SEFAG Zrt. The third narrow gauge rail goes to another nature reserve and it operates between **Szenta** and **Kaszó**. It is just 8 km long. It has solely touristic function; it is operated by KASZÓ Zrt.

Regional Development

Somogy has an extraordinary touristic potential, not just next to Lake Balaton, but in the inner, tiny-village area as well (village tourism, hunting, cycling). The Drava-basin territory is also a potentially important touristic zone (ecotourism, Water and active tourism). That's why tourism can become the other important way and take-off point of regional development beside agriculture and food industry.

Energy

Energy and tourism sectors linked to each other just partially. Energy sector does not influence tourism. Tourism service providers can be concerned by the potential energy efficiency projects.

In the future, geothermal energy can be the interface between the two sector, because thermal water has a double usage: it can be used for building thermal spas and producing energy or heat.

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