

Ásványráró

Vital Gold Hotel&Spa****

&

Red Gold Camping****

Feasibility study



Aquaprofit Műszaki, Tanácsadási és Befektetési Zrt.

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1. MANAGEMENT SUMMARY

The aim of the Szigetköz Üdülőkör Kft. is to establish close to Ásványráró a holiday resort of European standard, which would include one four star wellness hotel with 97 rooms, with an adjoining bathing facility, a lake system, a camping, apartments, and plotted holiday resorts on an area of about 51 hectares. These facilities would together constitute the resort, which would significantly influence the tourism-economic life of the community, as well as that of the area. The feasibility study was made taking into consideration the interaction between the elements of the project, more precisely for the Vital Gold Hotel&Spa**** and the Red Gold camping. In a further step of the development the hotel can be extended with another 80-100 rooms, and on the neighbouring property a golf court of international standard with 18 holes will be realized.

We wish to offer our guests a service package, which is completely unique in the sub-region. The hotel services offered will be of exclusive standard, obviously shown by the quality of the rooms and of the built environment, moreover of the high quality standard of the variety of services.

The plan is based on the following facts:

- In the last decade both in Hungary and in the neighbouring countries, such as Austria, as well as in other countries of the European Union the need for facilities offering extended level of services in the area of wellness, beauty, healthcare and similar fields has increased far beyond the level which can be perceived in the average industrial sector. Especially the number of nights spent in four and five star hotels has increased significantly.
- The geographical position of the project: Ásványráró is 40 kilometres from the boarder of Hegyeshalom/Nickelsdorf, and is easily accessible. The project itself lies within the internal area of Ásványráró on a territory of 51 heactares in the “heart” of Szigetköz.
- The settlement can be found 15 kilometres from Győr, the centre of the region and of the county, a city which because of its growing reputation in Europe and its economic importance carries out significant exchange both among industry, commerce and services.
- The hotel targets three types of guests: **businessmen** and **conference** participants, who come on weekdays and show significant willingness to spend; while at the weekends and during school holidays the **wellness** guests and the **families with little children**. The third type of guests would include **golf tourists**, who would come for the golf court to be established on the neighbouring site; golf tourism participants would be from middle aged to elderly.

Apart from introducing the project and the environment this feasibility study gives information about the personnel background of the operation and gives insight into

the marketing strategy. On the basis of analysing the economic aspects in the light of the costs and revenues it determines the performance of the project, its financial factors and the return expectations.

Tourism aiming at Hungary and tourism within the country has undergone significant changes during the recent years. The number of persons, who were mainly interested in the services, offered by four star wellness hotels, seeking recreational and wellness services has increased. These services require up to date infrastructure. Investors have also met the demand experienced in the recent years. The commercial accommodations, which are in connection with bathing, healthcare, and which have settled near an area with a certain health-factor (thermal water, climate, sludge, mofetta) and which are classified as health resorts have experienced increasing demand. From 2004 a difference was made between wellness hotels situated close to bathing facilities, offering recreational and health services based on thermal water individually, or together with a bathing facility which can be found nearby. The demand for them is shown by the fact, that while in 2004 20, in the first part of 2006 40 wellness hotels were operational, and the number of places has increased above 8000. The situation is the same for health resorts, however the difference was less significant, their number reached with a 2.5-fold increase 59 in 2005, and the number of rooms has almost doubled to 15000.

Together with a significant increase in the offers, the number of nights in the period analysed also increased steadily, since 2001 it almost doubled in the health resorts to 2.7 million nights, while in the wellness hotels it increased from 412 000 to 684 000. The acceleration of the demand was mainly triggered by the tourists from within the country, as 42% of the health resorts' and 70% of the wellness hotels' visitors came from the Hungarian target groups.

According to the plan a new, independent settlement will be created within the administrative borders of Ásványráró community, with its style showing the characteristics of both modern and rural architecture. The Vital Gold Hotel&Spa****, offering services based on thermal water, can be seen as the main element of the project, an additional element is the planned lake system around which land will be plotted and sold later. In medium and long term the 18-hole golf court planned on the neighbouring land, and which will be suitable for international tournaments, will contribute to the sustainability of the investment.

On the basis of geological examinations and according to the permission of the water rights establishment No. 36010-12/2004 a well with a maximum depth of 1300 meter can be dug. According to expert examinations thermal water of 60-65°C can be exploited from the aforementioned depth. With respect to the data on the neighbouring wells it can be stated with high certainty, that the thermal water has a high level of mineral content and could later be classified as spa water.

The holiday resort includes the following items:

- Vital Gold Hotel&Spa**** Ásványráró
- Camping Red Gold
- Apartments
- Holiday homes
- Lake-system

The system of public utilities has still to be arranged. The costs of the public utilities can only be calculated and estimated on the basis of the requirements of the planned buildings; this phase already belongs to the phase of theoretical design and plans with permits. This is when it can be determined, whether it is necessary to extend the public utilities, together with their costs. Ásványráró has 2000 inhabitants. If all the elements of the planned holiday resort are realised on the development project, and used at full capacity (there is little chance for this at the same time) the number of visitors can reach 1500 persons and the cumulated need for public utilities increases 1.5-fold or almost double.

On the plan the hotel was marked as a square shaped property labelled area “A” on a territory of 9.1 hectares. It can directly be reached from the road going to the village. The building complex of the hotel to be built on the currently vacant and flat plot will shape a stretching S-form. The adventure bath with its irregular shape will be attached to the central part of the building.

All the connections requiring vehicle traffic were designed for the service road, including the main entrance of the hotel and the restaurant, which also has an open space, next to the entrance. The staff and service entrance of the hotel is situated in the southern wing; the staff entrance of the adventure bath is the same as its main entrance.

The adventure bath, the hotel and the restaurant provide their visitors with ground level parking.

When designing the rooms of Vital Gold Hotel&Spa**** the following configurations, on which the calculations are also based, were suggested.

- 80 double-bed rooms, with a surface area of 28 m²,
- 15 apartments with a surface area of 40-42 m², with two rooms and a bathroom,
- 2 suites with a surface area of 65-80 m², with three rooms and two bathrooms.

The hotel has to comply with IKIM regulation 45/1998. (VI.24). on the four-star criteria system of the classification of commercial and customer accommodation and the qualification of rural/village accommodation, which is extended with wellness services. With respect to the services 130 points are necessary for the four star classification, which is supplemented by the criteria created by the following wellness denomination:

For the plan of the hotel all the relevant administrative specifications and provisions (emergency lights, fire alarm and evacuation plan, labour safety specifications, specifications of the National Public Health and Medical Officer Service, HACCP) the hotel has to comply with, have to be compiled.

Inside the edifice of the hotel and attached, the following units should be established:

- 80 double-bed rooms,
- 15 apartments (smaller suits),
- 2 suits,
- Reception area,
- Catering facilities (restaurant, drink bar),
- Wellness Park (bath),
- Beauty Park,
- Conference rooms,
- Shops,
- Other facilities,
- Staff offices and rooms.

The number and size of catering facilities should be optimized based on national and international experience, and in accordance with the daily eating and drinking habits.

Beside the minibars in the rooms the three following restaurants are suggested:

- restaurant for 200 guests,
- café and drink-bar for 60 guests,
- drink-bar in the bathing area for 20 guests.

Considering the increasing demand for conference and business tourism a larger room for 200 people and two smaller rooms for 50-50 people are suggested. The possibility to divide the larger room with a mobile wall into two rooms, increases the usability of the room, and if necessary with opening the rooms into each other a conference for 300 people can be created.

The conference rooms and the wellness services shall be in well separated units, in accordance with the structures used by hotels, so that the mingling of different guest groups could be avoided.

The building of the adventure bath is a fundamental part of the hotel, it is run by the hotel for its own guests and for the guests of the holiday resort, however, it is also open for guests from outside.

The establishment of the following three units is suggested:

- Adventure bath
- Wellness Park
- Beauty Park

The risk of return from the investment into the hotel Vital Gold Hotel&Spa**** and the Camping Red Gold can altogether be estimated as average. The supply in health tourism on the market has increased significantly in the area, which could be explained with the unsatisfied demand of recent years. Provider performance shows so far that facilities of similar quality possessing a bathing facility/spa, or accommodation providers which have been built by one have made the right decision. This given project integrates well those attractions which are only partly present in the area, and the traditional services supporting recreation fit well into the structure.

From the point of view of the market the risk-assessment is evaluated as medium. There is a financial risk if a major part of financing is done using bank credits. According to the calculations 70-80% of the whole investment could be financed from bank credits without putting the business beyond possibility, however, this level already carries certain risks.

2. INTRODUCTION AND CONTEXT

2.1. Introduction

The “Szigetköz Üdülöpark Kft.” acting as principal has authorised the Aquaprofit Zrt. as agent to draft a feasibility study for the planned hotel and camping on the basis of the territory development concept for the development project of 51 hectares in its property. The plans contain the building of a hotel of 97 living units, with a bath/spa and a wellness unit, and a camping of 190 places.

2.2. Context

On the basis of the agreement between the two companies the context of the feasibility study of the planned hotel, adventure bath and camping is the following:

Introduction of national and international health-tourism trends and the analysis of the market

- Presentation of the western-Transdanubian region
- Introduction of Ásványráró
- The analysis of regional and national development documents in the context of the realization of the project

The conditions and descriptions of the development

- Brief introduction of the development
- Introduction of the direct location of the project
- Introduction of the planned development
- Analysis of the financial validity and the viability of the development, analysis of the market, which includes the evaluation of both demand and offer

- Presentation of the market segment and the targeted guests at whom the services are aimed

Competition analysis

Marketing plan

- The expected development of the demand for services, price policy, utilization

Calculation of economic efficiency

- Starting assumptions
- Investment resource demand
- Expected operational revenue
- Expected operational costs
- Financial analysis

The feasibility study contains detailed contrasting of the professional conception with the building regulations in force (maximum parcel coverage, height of facade, infrastructural needs, provisions, number of parking places etc.), with special regard to the town and country planning and regulation plan. In case the specifications do not make it possible to carry out the conceptions of the investors, a proposition will be made to modify the regulatory elements of the town and country planning and regulation plan.

2.3. Methodology

The exploration and analysis of the situation was started with the examination and evaluation of the secondary sources collected about Ásványráró by our advisers and experts, national and regional reports and statistics, and the documents put at our disposal by the customer. Following this, and partly parallel with this work the land was explored and personal interviews were made.

The reports were made on objective basis. The royalties have nothing to do with the statements and conclusions made in the study. The experts of Aquaprofit Zrt. did their best so that we would be able to estimate the market possibilities after the market analysis had been done.

This study could serve as a decision preparation document for the financial institutions, investors and operating companies, and could also be used as an annex to tenders.

3. ANALYSIS OF THE SITUATION

This chapter surveys the most important statistics and observations. A more detailed analysis and elaboration of the data is contained in Annex 11.

3.1. The international and domestic trend of health tourism

In the first decade of the third millennium travel related to health tourism shows the most significant increase. At the beginning of the 1990s with the expansion of healthy lifestyle new health tourism services appeared beside health and spa tourism, which put the emphasis on health preservation instead of on traditional treatments. Among the new forms of health tourism wellness and fitness are the most commonly known concepts. The development of health tourism is significantly influenced by the demographic trends, the development of health consciousness of the population and the travel experiences, as well as the quality of the infrastructure offered.

The guests of health tourism typically use services based on natural health factors, and the average time spent is far longer than that of the average of the commercial accommodations. They usually travel in order to get treatment, prescribed by a doctor, the main role is played by the treatment, and tourism services play only a complementary part. Mainly pensioners, people coming from urban environment, with at least intermediate level education, lower/average income prefer this form.

For **wellness** tourists the comprehensive concept of health and health preservation (mental, physical and biological harmony) is important. They voluntarily participate in the programmes; the aim is less to cure a certain type of illness. Mainly middle aged and younger generations with higher level education and inhabitants of cities and better developed regions form this group.

The most important countries of origin: Germany (registered nights spent by foreigners in health hotels: 45.1%), Austria (15.7%), Switzerland (4.2%), the United States of America (3.1%), Great Britain (3.1%) and Italy (3.1).

According to the analysis concerning trends of the National Tourism Development Strategy the domestic demand is changing, and also a part of the domestic tourists look for higher quality services. Two or three shorter leaves from work start to become popular, and these usually mean a weekend or a longer weekend, providing an increasing demand for wellness, health and castle hotels. The use of the holiday cheque becomes more and more popular, and they are welcomed both on the side of demand and on offer. The trade of holiday cheques reached 5.7 billion HUF in 2003 and 7.5 billion HUF in 2004, the value of issued cheques exceeded 11 billion HUF in 2005, while that of the cashed ones 8 billion HUF. The more health conscious lifestyle of the population, the emphasis on health preservation, the growing popularity of allowances apart from the salaries among the employees, the state support for the health funds resulted in the expansion of the market. In 2005 490900 members were registered by the 48 health funds of the market. Through the health funds the population has more extended access to health tourism, as well as the possibility to utilize the baths and the services of the health and wellness centres and accommodations connected to them.

3.2. General and tourism characteristics of the Western-Transdanubian region

The Western-Transdanubian tourism region is a bit smaller than the similar named statistical-planning region, as 4 settlements of the Lake Balaton shore and 22 background settlements of the area do not form part of the region, but are members of the Lake Balaton Tourism region.

The population of the region was 1 000 348 persons on 1 January 2005. According to gender the distribution showed a 1-2% majority of women. 44% of the population lives in county Győr-Moson-Sopron, 30% in county Zala and 26% in county Vas. Following the national trend a slow decrease of headcount can be perceived by both sexes. In the Western-Transdanubian statistical region the GDP is only one fifth of that of the EU average, and if the purchasing power parity is observed it is hardly the half of the EU average. According to estimations even in 2015 the GDP of the country will hardly reach 75% of the EU average. A favourable picture of the region is however shown by the fact, that unemployment rate is lower than the country average, and more than 4 percentage points lower than that of the EU average.

Almost 11% of the GNP of the country is produced in the Western-Transdanubian region, and half of this in county Győr-Moson-Sopron. The GDP per person was 7-8% higher than that of the country average, however, the excellent performance of county Győr-Moson-Sopron was strongly undermined by the performance of county Zala.

3.3. Tourism

In the Western-Transdanubian region the registered number of guests at commercial accommodations grew from 679 000 to 721 000 between 2003-2005, which shows an increase of 6.1-6.2%., at the same time the number of nights went down from 1 951 000 to 1 934 000, which is a decrease of 0.8-0.9%. As a result of these two contradictory processes the average time spent also went down from 2.9 nights spent per person to 2.7 nights. While from 2003 to 2004 this was the only other region beside the Budapest-Middle-Danube region which could show development as regards number of guests, and in the country it was on the second place - in the other tourism regions the number of guests decreased - from 2004 to 2005 the Western-Transdanubian region slid back to the fifth place considering the dynamics of development. As for the nights spent not only the slowing down of development should be mentioned, but also the fact that in 2005 the registered nights spent did in fact not reach the level of 2003.

In the Western-Transdanubian region there was no significant movement concerning demand in 2005, the commercial accommodations registered a bit

higher number of guests and a bit lower number of nights spent. It also shows that the average time spent went down by almost 4% following the international and domestic trends. (maximum experience - minimum time).

In the three counties of the region there is a significant difference as regards number of guests and average time spent at commercial accommodations. The numbers show the superior position of county Zala and Vas, and the regional average is pulled down by county Győr-Moson-Sopron. As for transit traffic the proportion is just on the contrary, county Győr-Moson-Sopron is the largest “transit” because of the main East to West and North to South tourism routes crossing.

As far as country of origin is concerned there was no significant change as the main input into the number of nights spent comes from domestic, Austrian and German tourists amounting to almost 90%. The proportion of German tourists was represented slightly lower, that of Austrian tourists slightly higher compared to 2004. The most notable increase could be observed for the Rumanian, Polish, Spanish and English market, however none of them exceeds the proportion of 1.5% in the overall passenger traffic of the region. The trend of guests also adapted to the tendencies of the country, showing only minor differences. There is no significant passenger traffic of tourists from other countries.

There is, however, a positive increase in the income from accommodation, which - apart from higher inflation rates - shows a greater demand for more expensive accommodation.

3.4. Tourism products of Western-Transdanubian region

Except for the two world heritage sites (Pannonhalma and the Fertő landscape area) there are no important tourism attractions, still they can produce a significant tourism potential throughout the year in the fields of thermal, cultural and heritage tourism, as well as in the field of active tourism, with a wide range of specific services offered for the target group. Professional, wine and gastronomic tourism are also gaining importance. The protection and development of the values of the tourism region are guaranteed by the well organized village-tourism. The tourism products have a complementary role, and the tourism offer of the region creates a “tourism basket/package”, which as a complex unit increases the marketability of the region both at national and international level.

A brief outline of the treasures of the region.

Cultural and heritage tourism

The main attraction of the Western-Transdanubian region is its cultural heritage. The region has apart from the Roman heritage, through the religious and Hungarian historical places several significant heritage sites of both national and international scale (Pannonhalmi Abbey, Sopron, Győr, Kőszeg town centre, Fertőd Esterházy

Castle, Nagycenk Széchenyi Castle, Körmend Batthyány Castle, Fertőrákos Cave and the memorial Park of the Paneuropean Picnic).

Cultural events

The offer of cultural events has also reached international standards in the recent years (Savaria Historical Carneval, Wagner Festival, Liszt Festival).

Active tourism

The development of bike tourism has been unprecedented on the Western-Transdanubian region in the last five years. An umbrella organisation (Pannon Pedál) has been created to coordinate those involved in bike tourism, and the programmes. Smaller bike regions were established from the Szigetköz to the Mura area. The network of bike paths has been extended in the region (thermal bike path), national and international bikers events have attracted the bike tourists into the region. The biker centre of the Western-Transdanubian region of Kőszeg was handed over in 2006.

There are numerous possibilities for horse riding and riding events, show jumping/steeple chase and coach driving competitions, and other sports (golf, tennis, jet-sky, shooting, bob etc). From among the sport events the integrational golf competition and the Pannon Ring could be pointed out.

There are also several places available for sport flying (Pér, Fertőszentmiklós, Nagykanizsa, Szombathely etc.)

Fishing and hunting tourism

Owing to the mine lakes, Lake Fertőd and the numerous rivers the natural facilities of the region provide excellent possibilities both for fishing and for hunting tourism (Göcsej, Kőszegi-, Soproni-hills, Szigetköz).

Water tourism

The region is in a very advantageous position concerning water tourism. There are several possibilities for pursuing water sports (Rába, Duna, Mura, Mosoni-Duna, Szigetköz), and in Lake Fertő and in the smaller lakes one could even bathe.

Walking in the nature

Apart from the versatility characterizing the landscape of the Western-Transdanubian region, it possesses rich natural treasures. The areas of the region are characterised by the symbiosis of nature and culture, which results in cultural landscapes close to the nature.

14% of the protected natural territories can be found here. There are two national parks in the Western-Transdanubian area, the territories of which are entirely situated in the region. The natural park of Fertő-Hanság is situated in the northern part of the region Őrség on the border of county Vas and Zala. Several visiting centres have been established recently. In cultural heritage category Fertőtáj (Fertő land) is part of the world heritage. There are several well known arboretums in the

region and the natural parks also play an active role in the tourism of the region. This was the place where the first natural park - Irottkő-Geschniebenstein of Kőszeg - was established in 1999 with cooperation of the Austrian neighbours.

Gastronomy and wine tourism

The region has a rich gastronomic culture, which includes the versatility of the food connected to the area, as well as the wide choice of the wine-district. It should not be forgotten that the abundance of simple but refined food, which goes from generation to generation from mothers to daughters for a very long time, can always be connected to folk traditions and customs. The food of the certain areas can be found during community events like Saint Blasius day, patron's days, carnival, Saint Martin's day, Easter, Christmas, baptism and this could go on and on. The individual regions of the tourism region determined by folk cuisine and regional food are as follows: Szigetköz, Moson-area, Fertő-area, Hanság, Rábaköz, Őrség, Göcsej.

There are some historical wine districts in the Western-Transdanubian area (Pannonhalma, Sopron, Balatonmellék) this is what the organisers of wine tours make use of.

Events and programmes: Paneuropean wine competition, Kékfrankis summer program series, Tökfesztivál (Pumpkin festival), etc.

A unique initiative is the series of wine tourism programmes which ran in Sopron in 2005 under the title "Kékfrankos Summer", was organised with the support of the town in 2006 as well. With the cooperation of wineries, restaurants and accommodations there were various programmes organised for every day of the weekend.

Village tourism

Village tourism has started to develop in the region in the recent years. Its success can especially be observed in the strengthening and expansion of the people, enterprises, and their organisations taking part in tourism, the changes in the number of qualified service providers, and in the positive direction of settlement aesthetics. Service providers offer more and more packages combined with programmes and events for the potential customers. Apart from a few exceptions village tourism mainly provides complementary income. This is also true for such popular geographical areas as the Szigetköz, Fertő-mente area, neighbourhood of Sopron, Kőszeg-hegyalja, Őrség, Göcsej and Hetés. However, there are examples of peripheral areas as well: Rábaköz, Kemenesalja, Répce-mente, Southern-Zala (Nagykanizsa, Letenye, until Lenti on the side of the Mura river), Northern-Zala (Zala-valley from Zalalövő – to Zalaszentgrót, the Principális and the Válicka valleys).

Conference tourism

Apart from Sopron the region is equipped for the accommodation of only small and middle size conferences. The university locations and the services connected do not meet the expectations, so they cannot compete with the hotels which have conference rooms. One of the relatively new locations in Sopron is the Liszt Ferenc Conference Centre which is able to accommodate 1250 persons, but which due to

the parking difficulties is in a disadvantageous position concerning competitiveness. Even though the question of parking will be solved in the near future, this cannot compensate the lack of accommodations. The latest four star conference hotel with a wellness area was also established in Sopron. Smaller conferences, symposia and professional meetings can be held in Győr, Sopron, Szombathely, Zalaegerszeg, and Nagykanizsa.

Health and thermal tourism

During the previous years the demand for the baths of the region has steadily increased, and international trends also forecast an increase in the demand for tourism and especially thermal tourism. The bath itself is the main central offer and attraction of the settlements with bathing facilities.

Even in international contrast the region possesses unique abundance of baths with high temperature thermal water. Several settlements of the region possess health and thermal baths, some of which are of international fame, like: Hévíz, Bükfürdő, Sárvár, Zalakaros.

Baths of nationwide importance: Győr, Lenti, Balf, Hegykő, Kehidakustány, Zalaegerszeg.

Bath of regional importance: Celldömölk, Csorna, Kapuvár, Mosonmagyaróvár, Szombathely, Mesteri, Borgáta, Petőháza, Zalaszentgrót, Lipót, Vasvár, Bázakerettye, Szeleste, Letenye.

3.5. The tourism products of the Szigetköz area

The largest island of Hungary surrounded by the Big and the Mosoni Danube is not accidentally called the gift of the Danube as it was built from its silt. The rich flora and fauna of the region expects the nature-lovers. The preferred territories of ecotourists is the Szigetköz Tájvédelmi Körzet (landscape protection area), which was established in 1987 (Ásványráró, Bezenye, Dunakiliti, Dunaremete, Dunasziget, Feketerdő, Halászi, Hédervár, Kimle, Kisbodak, Lipót, Máriakálnok, Mecsér, Mosonmagyaróvár, Püski, Rajka). Protected marshland can be found at the following settlements: Ásványráró, Darnózseli, Hédervár, Kimle and Lébény.

The keen water tourists can visit the Danube branches surrounded by gallery forests, where various sections are available for the visitors arriving in canoes and kayaks. Beside the branch system of the Danube, several pebble-mine lakes make Szigetköz a real paradise for fishers. Fishing settlements have been established in Feketeerdő and Ásványráró at the Danube bank.

In Mosonmagyaróvár a thermal bath, swimming pools and a healing centre, in Győr an adventure bath welcomes visitors throughout the year, who are looking for cure and regeneration. The thermal bath of Lipót which is open during the summer season has pools for swimming, an adventure and a thermal bath. There are open

beaches between Nagybajcs and Vének on the bank of the Danube, in Győr by the dead-channel in Révfalu, by Doborgazsziget at the Zátony-Duna, in Feketeerdő, Halászi and Mosonmagyaróvár at the Mosoni-Danube. There are possibilities to bathe in the pebble mine lakes.

The riding schools of the region have a preference for horse trips and carriage trips organized into the region. In Dunakiliti a golf course with 9 holes is expecting the keen golfers. The main target areas of hunting are the floodplain forests rich in game, like by the Old-Danube and its side branches and by the side of the Mosoni-Danube.

The international bike path on the Danube side (Euro Velo) includes the section going through the Szigetköz, and the dykes, as well as the side roads with little traffic are suitable for cycling.

The Danube area has a wide selection of ethnographic, folkloristic, folk music and dance and historical heritages. The individual ethnic groups represent different features concerning their customs and tastes. The ancient (fishing and hunting), as well as the folk crafts (basket weaving, miller, ship building, gingerbread maker) can still be found in several areas of the Szigetköz. The architectural treasures and monuments preferred by tourists, as well as the cultural and historical institutions (musea, exhibition halls, theatres) attracting a high number of visitors are situated at the two central settlements, in Győr and Mosonmagyaróvár. Both the Szigetköz and the smaller settlements outside possess significant architectural and cultural-historical treasures.

3.6. The Mosonmagyaróvár subregion

The settlements of Mosonmagyaróvár subregion: Ásványráró, Bezenye, Darnózseli, Dunakiliti, Dunaremete, Dunasziget, Feketeerdő, Halászi, Hédervár, Hegyeshalom, Jánossomorja, Károlyháza, Kimle, Kisbodak, Lébény, Levél, Lipót, Máriakálnok, Mecsér, Mosonmagyaróvár, Mosonszentmiklós, Mosonszolnok, Püski, Rajka, Újrónafő, Várbalog.

The “Mosonmagyaróvári Többcélú Kistérségi Társulás” (Multi-purpose Sub-regional Association of Mosonmagyaróvár) was formed on 26 June 2004, with the participation of 26 villages. Each settlement is also a member of some local governmental development association. At the territory of the sub-region there are five associations. Ásványráró is the member of the Felső-Mosoni Dunatáj Társulás (Upper Danube Region Association) (Dunakiliti, Feketeerő, Halászi, Hédervár, Kimle, Mecsér). The centre of the association s Máriakálnok.

The total area of the sub-region is 893 m², the number of inhabitants 72 585. Considering the population this sub-region is characterized by slow increase, which is the a result of immigration.

Unemployment is not significant in the region (2.8%) and the deviation is not significant at settlement level either. Considering the sectoral division of the employees the sub-region has a relatively high level of people employed in agriculture and in the servicing sector. Educational level is slightly higher than that of the regional average; the proportion of secondary school qualifications is 32.86% and university graduates 8.51%, showing the secondary and higher educational centre nature of Mosonmagyaróvár.

The indicators showing the socio-economic development of the region are around the county average, and unemployment is not a significant problem. There are larger enterprises in the region, which employ a significant part of the population.

Transportation

The main roads and railroads of the region cross in Győr, Szombathely and Zalaegerszeg. Apart from these the following towns are transport centres: Mosonmagyaróvár, Csorna, Kapuvár, Sopron, Kőszeg, Celldömölk, Szentgotthárd, Körmend, Vasvár, Zalaszentgrót, Keszthely, Letenye, Lenti and Nagykanizsa. There is an important railroad line across the region, which diverges into the direction of Pápa, Veszprém and Székesfehérvár. Every settlement and village can easily be reached by buses.

3.7. General introduction of Ásványráró

Ásványráró is situated in the centre part of Szigetköz between Mosonmagyaróvár and Győr, in the same distance from both towns. The village was created by the unification of two settlements Ásvány and Ráró. The current administrative area covers 3917 hectares.

Ásványráró also fell victim to the flood of 1954, and the houses and outbuildings were all destroyed. These days this danger does not threaten the village, as the appropriate dam and channel system has been built. After the reconstruction the village started to develop with an enormous speed. Several new public buildings, a new school and a sport centre were built. During the last decade a great extent of public utility expansion took place: the water, gas, sewage pipelines and the telephone lines were built.

Ásványráró which has 1966 inhabitants according to the poll of 1 January 2005 has 789 homes and 150 weekend houses. Similar to the tendencies of the country the number of inhabitants is decreasing gradually.

The village can be reached via the public road through a service road from main road No1 or the motorway M1; from the direction of Slovakia it can be reached by road No 14; from Austria either via the motorway M1 or the main road No1. Ásványráró has no railway station but buses come every hour both from the direction of Mosonmagyaróvár and Győr.

The closest civil airport of the region is in Pér (county Győr-Moson-Sopron), and both the Austrian (Schwechat-Vienna) and the Slovakian (Bratislava-Vienna) airports are within reach.

The six new Austrian-Hungarian border crossings can be considered as a novelty, as they have recently been opened by determining tourist roads and bicycle paths at the following places: Sankt Margareth Schattendorf (Somfalva), Neckenmarkt (Sopronnyék), Deutsch Schützen (Németlövő), Inzenhofnál (Borosgödör), és Mogensdorf (Nagyfalva). There is further possibility to open tourism border crossings. According to the plans these will be available for tourists on foot, by bikes or on horseback, with valid travel documents.

3.7.1. The sights of Ásványráró

The settlement has no heritage of architectural or other importance, mainly its natural environment provides its attraction, and this can also be said for the rest of the settlements and villages of the Szigetköz area.

Ásványráró has the following sights:

- The church of Ásvány: build on medieval foundations in the 18th century. Its famous baptizing well originates from the 15th century.
- In the South-eastern border of the village there is a Calvary of artistic quality, which was built by Count Apponyi Lázár in baroque style in 1738. The black poplar tree is a protected environmental treasure, its trunk diameter is 550 metres, it could be around 100 years old.
- The church of Ráró was built in the 17th century to honour Saint Rochus. In front of the cemetery of Ráró stands the memorial of the soldiers who died in WW2, the monument was created by the sculptor József Somogyi, as one of his last works of art.
- On the bank of the Danube, at the meadow of Árva stands the memorial of the victims of the river regulation, it was erected in 1933.
- Memorial columns:
 - in the churchyard of the church of Ásvány a tomb from the 18th century,
 - an old brick cross in the cemetery of Ásvány,
 - a crucifix erected in 1859 in the centre of the village.

Cultural programmes

The cultural programmes are based on preserving traditions and gastronomy, one of them is the Gold Washing festival in the Szigetköz. The event presenting the traditional technique of the gold washers is organised every year by the Association for the Village Tourism of the Szigetköz in a different village of the area.

Sport and entertainment possibilities

The village provides excellent possibilities for water sports, walking in the nature, cycling and fishing.

Bike-trip in the Szigetköz on the Danube-shore

Itinerary: Rajka-Dunakitliti-Mosónmagyaróvár-Halászi-Lipót-Hédervár-Ásványráró-Györladamér-Győr, the length of the trip 54 kilometres.

Fishing Den of Ásványráró

The den belongs to the Fishing association of the County, in the beautiful environment of Szigetköz. A den for 30 persons, in a comfortable environment expects the visitors who wish to rest or are interested in fishing.

4. INTRODUCTION OF THE LOCATION OF THE PROJECT

4.1. The ownership, situation and size of the property

The Szigetköz Üdülõpark Kft., which is in the possession of private individuals, has bought the territory which can be found on the border of the community from the local government of Ásványráró. The owners would like to build a holiday resort on the 51 hectare territory.

On the basis of geological examinations and according to the permission of the water rights establishment No. 36010-12/2004 a well with a maximum depth of 1300 meter can be dug. According to expert examinations thermal water of 60-65°C can be exploited from the aforementioned depth. With respect to the data on the neighbouring wells it can be stated with high certainty, that the thermal water has a high level of mineral content and could later be classified as spa water.

The Szigetköz Üdülõpark Kft. plans the building of a holiday resort making use of the well listed in the permit, together with the establishment of a lake system. As far as the project is concerned the building regulation of Ásványráró community, the detailed regulation plan of the project area, as well as the water rights establishment permit No. 36010-12/2004 are available.

The property is situated in county Győr-Moson-Sopron, 15 km from Győr within municipality boundaries of Ásványráró, a settlement of about 2000 inhabitants. Szigetköz Üdülõpark Kft., which is engaged in tourism services was established to carry out the project, realizes the highest scale investment plan of the community. The main aim is to carry out the planned development, which by establishing a hotel, a camping, apartments and holiday-home lots based on the spa and the lake system, would be involved in offering recreational, healthcare, wellness and fitness services on the territory. For the establishment of the lake system and the plotted holiday-home sites two plan-versions were made (Version I. and II.). The products of the company are equally in demand by the national and international parties. The market possibilities of the company are substantially expanded by the golf court of international standard with 18 holes planned on the neighbouring site.

Identification data of the property

Land register reference 035/1, 035/2, 035/4, 035/5, 035/9, 035/11

Whole area **510.800 m²**

Divided accordingly:

Hotel:	91.000 m ²
Apartments:	44.500 m ²
Camping:	71.000 m ²

Version I.:

Holiday-home lots:	96.100 m ²
Lake and walkways:	97.200 m ²
Community green area:	46.200 m ²
Controlled roads:	64.800 m ²

Version II.:

Holiday-home lots:	96.500 m ²
Lake and walkway:	92.400 m ²
Community green area:	47.500 m ²
Controlled roads:	67.900 m ²

5. ANALYSIS OF THE FINANCIAL VALIDITY AND THE VIABILITY OF THE DEVELOPMENT

Tourism aiming at Hungary and tourism within the country has undergone significant changes during the recent years. The number of persons, who were mainly interested in the services, offered by four star wellness hotels, seeking recreational and wellness services, has increased. These services require up to date infrastructure. Investors have also met the demand experienced in the recent years. An ongoing increase in demand can be experienced at the commercial accommodations, which are in connection with bathing and healthcare, and which have settled near an area with a certain health-factor (thermal water, climate, sludge, mofetta) and which are classified as health resort. From 2004 a difference was made between wellness hotels situated close to bathing facilities, offering recreational and health services based on thermal water individually, or together with a bathing facility which can be found nearby. The demand for them is shown by the fact, that while in 2004 20, in the first part of 2006 40 wellness hotels were operational, and the number of places has increased above 8000. The situation is the same for health resorts, however, the difference was less significant, their number has reached with a 2.5-fold increase 59 for 2005, and the number of rooms has almost doubled to 15000.

The number of nights spent according to type of accommodation

Type of accommodations	Number of nights (thousands)		Index 05/04 (%)	As a ratio of the nights spent altogether in 2005 (5)
	2004	2005		
Health resort - national	1 011	1 143	113,1	13,2
Health resort - international	1 486	1 570	105,7	14,7
Wellness-hotel - national	241	480	199,0	5,5
Wellness-hotel - international	172	204	118,8	1,9

Source: Central Office of Statistics ZRt.,

Together with a significant increase in the offers the number of nights in the period analysed also increased steadily, since 2001 it almost doubled in the health resorts to 2.7 million nights, while in the wellness hotels its increased from 412 000 to 684 000. The acceleration of the demand was mainly triggered by the tourists from within the country, as 42% of the health resorts' and 70% of the wellness hotels' visitors came from the Hungarian target groups.

	Hotels	Health resorts
	average utilization (%)	
2001	46,6	63,4
2002	45,1	61,9
2003	43,7	57,4
2004	46,4	60,0
2005	48,2	61,3

Within the tourism sector there has been a shift of balance with the increase of guests requesting specialized branches (business-conference, healthcare, family and wellness-tourism). The needs of national tourism have also shown significant interest in the above mentioned specialized branches of tourism.

Tourism-sector has not been prepared for the change in the quality of services. Earlier the need was characterized by services shaped in accordance with the masses' requirements for the purpose of shopping tourism. The change in demand has taken place rapidly and the businesses involved with tourism could not or could slowly keep pace with market because of general lack of capital, therefore a heavy demand has been created for quality accommodations. This demand does not only require extra quality (4-5*) accommodation, but also sets the supply of complex

services attached to them as a condition (sauna, adventure bath, solarium, aroma bath, massage, etc).

The lack of exclusive services is strongly experienced in the area of season oriented tourism. The seasonal problems can be overcome through the establishment of the special branches of tourism (business-conferences, healthcare, wellness, active and family tourism). Since the aim of the planned investment is to fully meet the market need for comprehensive quality services preferred by the market demands, it will be able to satisfy both the guests of similar investments up to the present, and the requirements of those wanting exclusive services.

5.1. The financial effects of the investment

The direct results of the investment (micro-environment)

- With respect to the investment the supply of a full quality service aiming at a target group of several generations will be present in the Mosonmagyaróvár sub-region.
- With the dynamic increase of the number of visitors and the services used the possibility of a profitable healthcare-tourism centre could be created.

The regional effects of the investment (field environment)

- The tourism offer of the area increases with the adventure bath, the differentiated accommodations, and with the healthcare services combined with golfing possibility in the medium term. The supply of the region becomes complex, and the guests stay longer.
- The visitors stay in the resort will trigger further spending in the village and in the area (accommodations, transport, entertainment, gift-shopping, shopping, etc.)
- The hotel resort, the holiday-homes, the apartments, the lake system will attract a wider range of visitors to Ásványráró and to the Szigetköz at the same time.
- After the project elements of the holiday resort are established at least 100-150 new jobs will be created.

The effects of the investment on national economy (macro environment)

- In the first year of operation owing to the realization of the investment, with an estimate of 40% usage 31 thousand nights spent with 10-11 thousand guests could be counted upon. The passenger traffic of the camping can surpass 28 thousand nights spent.
- After the plots of the apartments and the holiday-homes are sold the construction is carried out by private persons, this also increases the investment into the area, moreover the settling of mainly foreigners coming to the area can also be counted upon.

- When calculating the production multiplier for every forint spent by the guests of the hotel and of the camping an additional production value amounting to a 1.67-fold sum was realized in the economy as a whole.
- When calculating the income multiplier it was assumed that every forint spent by the tourist increases the labour-income by 0.75 HUF in the economy.
- When calculating the employment multiplier it was assumed that every 100 job created in health-tourism generates a further 214 jobs in the national economy as a whole. With the realization of 150 new jobs at the holiday resort a further 321 new jobs will be created in the national economy.
- As a result of the investment hundreds of millions of HUF get back to the budget annually in the form of taxes.

6. INVESTMENT PROJECT

The investment will be realized at the boarder of Ásványráró on the 51 hectare development site connected to the inferior road, joining the small settlements of the Szigetköz area, and which is parallel with road No1. On the side of the road the property is bordered by the cemetery, on the west, north-western-side by Ásványráró village, while on the remaining sides by agricultural crop fields.

According to the plan a new, independent settlement will be created within the administrative boarders of Ásványráró community, with its style showing the characteristics of both modern and rural architecture. The Vital Gold Hotel&Spa**** offering services based on thermal water, can be seen as the main element of the project, an additional element is the planned lake system around which land will be plotted and sold later. In medium and long term the 18-hole golf court planned on the neighbouring land, and which will be suitable for international tournaments will contribute to the sustainability of the investment.

The holiday resort includes the following items:

- Vital Gold Hotel&Spa**** Ásványráró
- Camping Red Gold
- Apartments
- Holiday homes
- Lake-system

6.1. Architectural design

6.1.1. The introduction of the lot

The situation of the 51 hectare lot is specific for several reasons and at the same time determining from the point of view of the future functioning of the lot. It is situated within the administrative borders of Ásványráró, separated from the municipality boundaries, directly beside the road connecting Győr with Ásványráró.

6.1.2. Antecedents of the plan

The building regulation of Ásványráró determined the development and the directions of protection and amelioration of the village, and in accordance with this, the manner of utilization of certain territories and parts of territories, as well as the three dimensional setting and arrangement of the infrastructural elements necessary for operation.

6.1.3. Building requirement notes in connection with the investment and other questions raised

On the basis of the information gained and after getting familiar with the analysis and the evaluation of the social environment, which adapts the provisions of the regulation plan, the requirements are as follows:

- Suitability - is a requirement independent of the function, which entails a compliance of various scales, namely compliance with the landscape (natural environment) and compliance with the limited environment (built and natural);
- Correspondence - according to the given function - to correspond with the national, regional, sub-regional, neighbourhood, and local programmes, correspond with the international and national standards, regulations and provisions.

Local Construction Regulation (HÉSZ)

The approved HÉSZ corresponds with the conceptions of the investors, however, certain modifications are suggested:

- The width of the regulated roads should be 15 metres instead of 12 metres, so walkways and pavements can be constructed on both sides, increasing spaciousness in an area densely constructed with holiday homes.
- In the holiday home area 600 m² was used as average plot size instead of 350 m², so the surface level indicator may change from 0.2 to 0.3. The size and design of the 150 plots can change be increased or decreased in accordance with the investors needs, and by changing the water surface of the two lakes.

- The Local Construction regulation did not contain provisions for apartment houses so far, however, apart from the hotel and the camping, the holiday resort plans also contains the establishment of a new residential area with sites for apartment houses.

The parameters of the new area:

- Minimum size: 1.500 m²
- Maximum size: 6.000 m²
- Parcel area coverage 20 %
(but for sites above 5000 m² the gross area coverage does not exceed 1000 m²)
- Minimum percentage of green area: 60 %
- Surface level density: 0,4
- Building height: 6.00 m
- Maximum six holiday units in one building on one site.

The aim of the suggested modifications is to have an attractive and marketable recreation area ensuring large green spaces in a comfortable environment. Instead of the numerous low standard “litte plots” it is more sensible to create less but higher standard building lots.

At the lot of the hotel (lot marked A) the 18.5 metre construction height enables the building of a ground level plus 4 floors, but even a ground level plus 5 floor construction can be constructed, however it would be less spacious. At the following stage of planning the level and dynamics of ground water should be examined, so that it could be established whether it is worth constructing a basement for the hotel.

Taking the holiday resort as a whole a complex site development is carried out, where regulated public places are established (roads, pavements, public green areas), the maintenance of which should be taken care of. There are many possibilities to arrange maintenance:

- The maintenance and operation of the regulated public places is handed over to the ownership of the cleaning service of Ásványráró local government. The conditions of this agreement have to be settled between the owner of the territory and the investor and the representative of the local government.
- The investor will create a company for the maintenance of the public places and the real estate owners of the territory pay a settled amount of “common expenses” to the company. This might create a closed residential park atmosphere, with the possibility of a separate built reception area and security service.
- The investor organises the maintenance of the public areas with an external firm with the necessary expertise.

The MENEDZSER Mérnöki Iroda Kft., Győr (which drafted the Local Construction Regulation) gave opportunity to consult in connection with the Local

Construction Regulation; the designer of the Local Construction Regulation declared the modifications acceptable, and they can also be integrated into the regulation.

The planned developments also require the modification of the Local Construction Regulation.

Artificial lakes

The construction of the artificial lakes planned for the first phase on the territory is essential for the construction of the holiday home lots.

Observations concerning the construction of the lakes:

- The starting question of the investment is whether the lakes can be created either without loss and profit, or with profit against the counter value of the exploited pebbles and ground. If not, the expenses for the lots could be enormous, which would make their profitable sale doubtful.
- The certificates and permits of the geological, mining, and water authorities necessary to create the lake bed require long lasting processes.
- If the construction of the lakes took several years it would undermine the timely construction of the holiday resort. It would be unfortunate if the trucks carrying the exploited pebbles and ground ran beside the already constructed hotel, camping or the already plotted land.
- The two lakes and the walkway would occupy a territory of 97 200 m² according to version I. and 92 400 m² according to version II. The size of the territory depends on the investors requirements and the amount of the raw material to be exploited. At the planning of the lake the minimum and maximum water level, as well as the depth should be established.

For the creation of the lakes a water right permit plan should be drawn, to which the various authorities might require the permit from authorities responsible. The construction can only be started with approved permits.

The lake connected to the hotel, unless its only purpose is to serve as “decoration”, should have a minimum surface area of 10 000 m² to be constructed as a biologically self sustaining lake.

The thermal water well

Within the development site the North-Transdanubian Environmental and Water management Inspectorate gave permission for the construction of a 1300 m deep thermal spring well on the property registered under the following topographic number: 035/13. The water rights establishment No. 36010-12/2004 following one prolongation is valid until 31. August 20011.

Well data:

- Bottom depth: 1.300 m

- Water requirement: 150.000 m³/year
- Characteristics of water supply: thermal water
- Expected outflow temperature: 60-65 °C

The determination of the mineral content can be established on the basis of water sample after the well has been dug, the mineral content of wells of the region is suitable to be declared spa water.

Not only how much water can be gained from the well is important, but also the fact where the used water can be diverted. After balneological-bath purpose utilization of water it is not obligated to reserve thermal water. The permit will contain, however, several environmental regulations (environmental permits) concerning the placement, the most important of which is the suitable low temperature. Therefore it is advisable to include a heat pump or other possible utilization for maximum cooling effect, and this should be integrated into the mechanical design.

The leisure time lake system is excellent system for this, however, when reserving water with adequate temperature and salt content the environmental and water treatment regulations should be complied with.

6.1.4. Public utilities

The system of public utilities has still to be arranged. The costs of the public utilities can only be calculated and estimated on the basis of the requirements of the planned buildings, this phase already belongs to the phase of theoretical design and plans with permits. This is when it can be determined, whether it is necessary to extend the public utilities together with their costs. Ásványráró has 2000 inhabitants: If all the elements of the planned holiday resort are realised on the development site, and used at full capacity (there is little chance for this at the same time) the number of visitors can reach 1500 persons, and the cumulated need for public utilities increases 1.5-fold or almost double.

There is no obstacle to exchange the electricity cables running across the territory with ones underground.

6.1.5. Compliance with the limited environment and with the built and natural environment

Every investment has a defined function, with its own operation conditions, internal technology and external and internal scope. Every building has an economic and a more noisy side, as well as a silent zone. This internal balance should be brought to perfection in order to achieve smooth operation.

Compliance with nature does not only mean the relationship with the landscape, but also the compliance with the built environment. There is no determining edifice with specific features in the surroundings of the territory. There are former

agricultural and industrial buildings, and vegetable gardens of houses in the neighbourhood.

6.2. Construction of the Vital Gold Hotel&Spa** Ásványráró**

On the plan the hotel was marked as a square shaped area labelled area “A” on a territory of 9,1 hectares. It can directly be reached from the road going to the village. The building complex of the hotel to be built on the currently vacant and flat lot will shape a stretching S-form. The adventure bath with its irregular shape will be attached to the central part of the building.

All the connections requiring vehicle traffic were designed for the service road, including the main entrance of the hotel and the restaurant, which also has an open space, next to the entrance. The staff and service entrance of the hotel is situated in the south wing; the staff entrance of the adventure bath is the same as its main entrance.

The adventure bath, the hotel and the restaurant provide their visitors with ground level parking.

6.2.1. The building of the hotel

The building of the hotel is made up of floors with cores moving vertically, which will be constructed upwards using the same scheme for unfolding. According to preliminary plans the owner of the development site planned a wellness hotel with 97 accommodation units in the first phase, and an additional 80 units in the second phase, which would give 177 units altogether.

In the regulation plan the territory is marked as “territory of thermal hotel”:

- Maximum parcel coverage: 30%
- Maximum height of building: 18.5 metres
- Minimum percentage of green area: 50%
- Maximum permissible floor density: 0,5
- Parking facilities should be made available on the territory.

The study also contains a perspective plan and a building filed drawing about the holiday resort, as well as about the hotel. More detailed architectural documentation (plans with permits, ground mechanical analyses) have not been made, the suggestions only contain theoretical, functional and operational aspects. Experience shows that the final concept of a wellness hotel usually comes out during the negotiations with the operator.

A modern and at the same time - as far as service structure is concerned- classical holiday hotel is suggested for constructing the planned wellness hotel, which would accommodate the present and future expectations of the main segments. For interior

design - for the creation of public spaces, lights and colouring - it is suggested to examine and analyse international examples with similar purpose.

The hotel has to comply with IKIM regulation 45/1998. (VI.24). on the four-star criteria system of the classification of commercial and customer accommodation and the qualification of rural/village accommodation, which is extended with wellness services. With respect to the services 130 points are necessary for the four star classification, which is supplemented by the criteria created by the following wellness denomination:

- The hotel has at least one indoor pool.
- The hotel has at least two types of sauna and steam bath facilities.
- From among the beautician, body, manicure, pedicure and hair care services the hotel has an offer at least in four.
- The hotel offers at least six types of massage, relaxation and other wellness - wet and dry - services.
- The gastronomic offer contains food and beverages characteristic of the region, the traditionally Hungarian, the reform and the vegetarian cuisine.
- The hotel has cardio machines and fitness-room, with a trainer, or PE teacher.
- The hotel offers at least four types of leisure, sport and oriental programmes, and at least one aerobic like training.
- The hotel offers at least three types of public, cultural, musical, or artistic programmes, and has a continuous offer concerning the possibilities available in the region.
- The hotel has both in the morning and in the afternoon shift at least one wellness expert or employee with equivalent training.

For the plan of the hotel all the relevant administrative specifications and provisions (emergency lights, fire alarm and evacuation plan, labour safety specifications, specifications of the National Public Health and Medical Officer Service, HACCP) the hotel has to comply with, have to be compiled.

Inside the edifice of the hotel and attached the following units should be established:

- 80 double-bed rooms,
- 15 apartments (smaller suits)
- 2 suits,
- Reception area,
- Catering facilities (restaurant, drink bar),
- Wellness Park (bath),
- Beauty Park,
- Conference rooms,
- Shops,
- Other facilities,

- Staff offices and rooms.

The hotel can be divided into three larger functional units (rooms, wellness bath, catering/conference). For parking there will be an area constructed to accommodate cars and buses.

6.2.2. The rooms and their equipment

When designing the rooms of Vital Gold Hotel&Spa**** the following configurations, on which the calculations are also based, were suggested.

- 80 double-bed rooms, with a surface area of 28 m²,
- 15 apartments with a surface area of 40-42 m², with two rooms and a bathroom,
- 2 suites with a surface area of 65-80 m², with three rooms and two bathrooms.

The equipment of the rooms:

- Balcony,
- Individually adjustable air-conditioning,
- Television, basic package and satellite channels against payment,
- Room safe,
- Telephone,
- Internet connection, both cable and Wifi,
- Minibar,
- Full length mirror,
- In the bathroom: hair-drier, magnifying mirror, bathrobes, and facial tissues.

For composing the equipment for the apartments the comfortable accommodation of families with one or two children should be considered. There should be enough room in the living room to accommodate a collapsible chair, and two persons should be able to stay in the bathroom at the same time. The built in cupboard should be 1.5 times the size of a built in cupboard of a normal room. The toilet should open from the living room or the hall. It is suggested to construct a suite of this type with a living room, which is suitable to accommodate smaller meetings, or several family members, and as far as furniture is concerned it should be of higher standard.

In international hotels one bedroom of the suits usually has an entrance which is not connected with the living room, and this bedroom usually has a separate toilet. For the suit it is suggested to construct one living room with an attached bedroom, and a bedroom with a separate entrance. The two bathrooms should be constructed in accordance with international standard completely separated and independent of each other, so during business meetings the negotiating partners and the relatives can use separate bathrooms. The living-room requires suitable equipment for

meetings, namely desk and a smaller bar. The role of the suits will be indispensable during medical, technical and other types of conferences.

40% of the 80 double rooms - taking into account the conference guests, teenagers and businessmen who do not need single room accommodation - should have the beds placed apart by 0.8-1metre.

On the basis of international experience at least two rooms - with extra wide entrance and a specially equipped bathroom - should be made available to accommodate disabled guests. For construction of the hotel the unobstructed access of the individual units should be kept in mind.

When designing the rooms and the corridors practical ideas, namely as few steps as possible, in order to facilitate the carrying of packages, are emphasized. For the size of the room doors the height and width instructions, as well as the labour safety rules should be complied with. There should be sufficient number of rooms with adequate area for the operational tasks: storage for dirty laundry and clean clothes, cleaning substance storage, offices of maids and staff.

The living units with central corridor will overlook the neighbouring golf court, the small lake in front of the hotel and the park in front of the main entrance.

In the first phase the hotel counts upon 80 double bed rooms, which can be extended according to needs in the medium term with another 80-100 rooms.

6.2.3. Catering

The number and size of catering facilities should be optimized based on national and international experience, and in accordance with the daily eating and drinking habits.

Beside the minibars in the rooms the three following restaurants are suggested:

- restaurant for 200 guests,
- café and drink-bar for 60 guests,
- drink-bar in the bathing area for 20 guests.

The above facilities provide versatile and thorough services for the guests, while at the same time cater for the needs of the transit visitors, as well as the guests lodging at the private houses, apartments and camping of the resort.

For the restaurant an area of 350-400 m² is necessary to accommodate 200 guests at the same time. In connection with the interior of the restaurant a division in three parts is suggested:

- A winter garden which is able to accommodate 60 persons and overlooks the internal park of the hotel, and in good weather could be

opened and could function as an open terrace. A la carte serving will also be possible, so guests who do not reside in the hotel will be able to use the services.

- A restaurant for 140 persons with buffet service which would suit guest both with traditional and with special requirements (vegetarian), with special offer in food and beverages.

In the restaurant for the three main meals aquavit-buffet/smörgasbord is suggested taking into consideration both the trends and the reform eating habits.

The drink bar around the pools in the bath can service 20 persons at a time. For the bar and other furniture Mediterranean atmosphere is suggested, but in such a way that the bar should fit in with the colouring and the style of the interior spaces.

While the restaurant is open and because of the four star classification of the hotel it is suggested to have room service, however, taking into consideration the predictably low demand, there is no need for a separate preparatory room and a room-service menu.

A kitchen for 300 helpings and a confectionary for 50 helpings, which would comply both functionally and logistically, should be constructed within the hotel close to the catering facilities. When choosing kitchen equipment it should be kept in mind that all meals will be served in an aquavit-buffet/smörgasbord manner, so the kitchen can easily plan and prepare the meals in advance based on the previously received data on booking. It is an important aspect when selecting the kitchen utensils and the applied technology that hundreds of helpings are prepared at the same time, and that there should be sufficient serving and storing capacity, however when designing the size of the kitchen oversizing, which is so common in Hungary, should be avoided. The counter system, which is used to ensure serving the guests should be constructed as part of the kitchen, which would enable the chefs to make use of the open kitchen thereby making the section more colourful (grilled food, pastas, egg, pancakes, flambés).

The monotony of the aquavit-buffet/smörgasbord should be complemented with tray service in the café.

6.2.4. Conference and programme rooms

Considering the increasing demand for the sector and based on international and domestic experiences a larger room for 200 people and two smaller rooms for 50-50 people are suggested. The possibility to divide the larger room with a mobile wall into two rooms, increases the usability of the room, and if necessary with opening the rooms into each other a conference for 300 people can be created.

The conference rooms and the wellness services shall be in well separated units, in accordance with the structures used by hotels, so that the mingling of different guest groups could be avoided.

6.2.5. Recreation and Wellness Centre

The building of the adventure bath is an elemental part of the hotel, it is run by the hotel for its own guests and for the guests of the recreation area, however, it is also open for guests from outside.

The establishment of the following three units is suggested:

- Adventure bath
- Wellness Park
- Beauty Park

When setting up the three functions attention should be paid how the different scopes of services are related, and the servicing of the various parts could be organized and administered from a common information and dispatcher counter.

When determining the expected number of visitors calculations were based on the size of the pools, the number of visitors staying at the facility at the same time, and the expected capacity utilization. The capacity utilization of the pools was determined on the basis of the provisions of regulation 37/1996. (X.18.) of the Ministry of Public Welfare. The required water surface - which should be adjusted with a correction factor (divided by 2.5) - is the following: for an adventure bath 5 m², for a sitting bath 2.5 m², for children's pool 2 m².

The area of the pools and of the rooms was determined as regular shapes, while in the wellness centre the utilization of irregular shapes is considered favourable.

6.2.5.1. Adventure bath

The basic atmosphere of the adventure bath is given by the palm trees, exotic plants and the harmonizing cobbling made with natural stones.

The floor plan of the adventure bath is planned as follows:

The adventure bath can be reached from two directions, through the main entrance hall of the hotel, which is mainly for the hotel guests and for the external ones. After the registration of the ticket and the services (chipped bracelets) which can be bought at the cashier's desk at the reception, and after passing a control gate the visitor arrives at a distribution area. The guests of the holiday resort (apartments, holiday homes and camping) can enter the adventure bath without passing the interior area of the hotel, through a direct entrance, where at the entry counter they can buy their tickets. Through a central changing room and a sanitary unit the visitors immediately arrive in a hall with Mediterranean atmosphere, where they are given information about all the services offered by the resort. There are several resting areas well hidden under the palm trees, as well as a drink bar, which offers Hungarian and region oriented beverages.

Pools:**Covered indoor pool**

Children's pool: irregular shaped pool with an area of 50 m² for accommodating 25 children. The pool is divided both thematically and according to age groups, there is a different depth for different age groups (20-40-70 cm), and equipped with different attractions. There are various spectacular elements around the pool, smaller slides, monkey bars and different figures.

Warm water sitting bath: irregular shaped pool, designed for 32 adults, with a surface area of 80 m² and a depth of 1-1.2 metres, where sitting and lying areas are constructed. The temperature of the pool is between 34 and 36⁰C.

Adventure bath: surface area of 120-150 m², constructed from three larger structural parts for 24-30 people. Around the small island in the pool a whirling corridor, into the "bays" an underwater air blowing system will be constructed. Apart from these, equipment generating counter-current, a waterfall and numerous other adventure elements will be included. A part of the pools will be constructed externally. Among the adventure elements there will be an underwater massage bed, neck showers, different geysers, and a counter-current generating unit, which will generate an eddy like a whirling river within determined intervals. On a surface area of 30 m² a part suitable for swimming could be detached from the pool, which might ensure the visitors the possibility to move beside resting and relaxing.

Jacuzzi pool: two massage pools with a diameter of 3 metres for 8-10 persons.

Open air bathing area

Adventure bath: a surface area of 110 m², irregular shaped pool for 22 persons, which is connected to the internal adventure bath with a neck element "to swim out". This pool also operates throughout the year as well as the indoor pools, so one can swim out to the open air both in the summer and in the winter. The average depth of the pool is 1 metre. On the seat banks constructed on the side of the sidewalls in the outdoor part there will be effervescent beds created in several rows. Vis a vis these beds there will be a neck shower. As main attraction a geyser of high performance will be placed in the centre of the pool.

Children's pool: a surface area of 60 m² for 30 children with a similar construction and setting to that of the indoor pool.

Resting/recreation area

There will be several from each other partly separated areas used for this purpose; indoors 400 m², outdoors 7000 m². These areas will be equipped with deck-chairs and beach umbrellas. The needs of those choosing active recreation/rest is also taken into consideration, for them beach volleyball, swinging skittle, table tennis, minigolf and a playground will be made available outdoors.

6.2.5.2. Wellness Park

The following services will be made available:

- Sauna garden: Individual sauna house for about 40 persons, with 4 different sauna cabins (Finnish, aromatic, bio, infra) one steam room and a salt-chamber. For guests who would only wish to relax 2 silent tepidaria (40-45 C°) will be at their disposal. The sauna has a railed off “intim” area where an outdoor Finnish sauna can be constructed. To the covered and outdoor parts of the sauna garden there will be a dipping pool built with a surface area of 27 m².
- Fitness centre: a training room on an area of 200 m² with 10-15 cardio- and fitness machines, and 2 squash courts will be constructed.
- Massage rooms: 3 rooms, where different types of massage will be made available (aromatic, Swedish, healing, lymph and refreshing).
- Kneipp-course: two functions are suggested for the application of Kneipp-courses and healing methods in two rooms: a Kneipp- foot massage on an area of 6 m², and water therapies hot and cold bath and washing.

The overall surface area required for the sauna garden taking also into consideration international experiences would be around 200-250 m².

For the two room Kneipp-course part a spacious unit with an area of 70-80 m² would be sensible.

6.2.5.3. Beauty Park

The services in connection with beauty, cosmetics and hair care can partly be used individually or as part of the wellness package. The beauty salon should be connected to an internationally well known brand (Oriflame, Clinique). Leasing the rooms would be a solution for running the beauty salon, however depending on the operation habits of various hotel operators it could also be run in house. The study suggests the construction of a beauty saloon with a surface area of about 150-200 m², offering the following services

- Hairdressers,
- Cosmetics,
- Manicure, pedicure,
- Solarium,
- Facial treatments,
- Body treatments,
- Programs in connection with beauty and wrappings.

When establishing the beauty services and designing the related marketing activities – with regards to international and domestic experience – the environment and the services should be made available for men, as well.

The study also suggests the construction of further rooms which could also be leased (eg.: dentist's surgery).

6.2.6. Other facilities

Further facilities, which would serve the relaxation and rest of guests staying at the territory of the holiday resort for a shorter or longer period, and facilities, which would also expand the general structure of the hotel

- Bowling: because of its territorial claim it could be constructed in the basement close to the catering facilities which stay open late, with a surface area of 100 m².
- Billiard room: close to the bowling hall, connected to it with a door, with a surface area of 30 m².
- Card room
- Shop(s)

6.2.7. Garden design

The external parking lots would be placed in front of the main entrance and on the southern side of the building. The entrance of the hotel could be reached by car, however, parking would only be possible at the parking lot constructed for this purpose. The capacity of the parking was calculated in accordance with the number of rooms, so in the first phase there would be parking places constructed for 80 rooms, and later for 160 rooms, which would require a surface area of 1800 m² in the first and 3600 m² in the later phase. Beside the parking lots first 20 at a later stage 40 big leafy trees would be planted, which would comply with the Országos Településrendezési és Építési Követelmények (National Town and Construction Requirements).

Beside the main entrance of the hotel there would be a water and light effect, while in front of the building a smaller lake with a fountain, and a walking path around, with plants to ensure comfortable ambiance. The spectacular ornamenting elements would create a representative welcome area with the pre-programmed nozzles producing various water-effects together with the light-effects.

The area in front of the building should be planted with evergreen and deciduous trees and bushes to emphasize the representative nature of the hotel.

The main element of the back area of the garden is the adventure bath with the dome, to which the grassy sun bathing area and the playground are functionally attached, and which is detached from the rest of the garden by a visual border with different plant groups. For the construction of the playground it is suggested to include toys which have some connection with water, eg.: a ship, or toys which can be played with in water.

The tennis courts and the recreation garden can easily be reached on the path leading around the garden. The courts should be detached from the rest of the garden with plants.

The planned golf-court could be reached from the hotel through the garden.

6.2.8. Parametres:

Hotel building

Number of rooms	80 (double bed)
	15 apartments

2 suits

(This plan also takes into consideration another wing with additional 80-100 rooms.)

Restaurant	200 seats
Café and drink bar	60 persons
Drink-bar	20 persons
Conference room	200 persons (larger room)
	50-50 persons (2 smaller rooms)
Adventure bath:	
Indoor water surface	264 m ²
Outdoor water surface	170 m ²

Outdoor facilities

Parking	200 places
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Area requirements:

Total area of hotel:	91.000 m ²
Built in area of hotel (80 rooms):	4.200 m ²

The project has a double aim:

- Traditional Hungarian hospitality on the Austrian-Slovakian-Hungarian border, with several Hungarian events and programmes included for the hotel guests, and making the guests familiar with Hungarian products through these programmes and events.
- Maximizing the additional value (accommodation and complementing services. Services which have at least in the medium term (5-6 years) a price advantage should be prioritized, (golf, bathing, dentist's surgery, hair care, beautician).

6.2.9. Estimated costs of ownership

The value of ownership of the hotel includes the following items:

I. Phase 1	Cost of ownership
Hotel (97 accommodation units)	1.160.000.000 HUF
Catering	120.000.000 HUF
Adventure bath (indoor and outdoor water surface and recreation area)	290.000.000 HUF
Wellness Park	110.000.000 HUF
Beauty Park	40.000.000 HUF
Other facilities	75.000.000 HUF
Parking	45.000.000 HUF
Roads and paving	60.000.000 HUF
Public utilities, well drilling, others	500.000.000 HUF
Total	2.400.000.000 HUF
II. Phase 2	
80 accommodation units	1.050.000.000 HUF
Parking	32.000.000 HUF
Total	1.082.000.000 HUF

6.3. Camping

Observing the Hungarian but mainly the Western-European travel habits and trends it can be concluded that there is a growing demand for camping sites which are close to the nature and at the same time well-equipped with all the services. Currently tourists coming with a mobile home from the Netherlands, Germany and Austria choose camping sites.

Camping sites can be found in the Szigetköz area, and also in Ásványráró, however their quality and popularity is below the level, with which the above mentioned target group could be reached. There is no camping with four star places, which would comply with the conditions set out in the regulation. However, one can assume that visitors would prefer a camping with direct connection to a hotel, in a comfortable environment, with a golf court and baths, and which offers higher standard of services.

On the basis of real needs and utilizing the free areas of the holiday resort the study suggests the establishment of a four star camping on the northern side of the territory, on the green area (Area marked C) beside the site of the planned golf court.

There is a flat, currently agricultural area of 7.1 hectares, where 190 reserved places according to the regulation with an area of at least 80 m² could be established, with green areas, roads and service facilities attached. The planned camping does not

entirely cover the territory available, so there will remain place for further developments.

At the entrance a representative entry building with shops and catering facilities can be established, in accordance with the conditions set out for a four star camping.

The area of the buildings:

Buildings serving only the camping (toilets, sanitary units, common areas): 4x150 m²

Buildings serving not only the camping (shop, catering facilities): 3x100 m²

Estimated costs of ownership

Camping	Cost of ownership
Common rooms:	141.000.000 HUF
Shops:	70.500.000 HUF
Internal roads and paving	130.000.000 HUF
construction of 190 reserved places	76.000.000 HUF
Total	417.500.000 HUF

6.3.1. The arrangement of the territory

The arrangement of the territory should be in harmony, suggesting spaciousness and comfort. The roads and the walkways inside the camping should be named in such a way, that also the foreign guests would be able to remember and pronounce them. There should be several direction signs facilitating the orientation of the guests, and maps presenting the camping, the bath and the neighbourhood. The study suggests the utilization of natural materials, and the avoidance of plastic and metal. The pedestrian ways should be paved in such a way, that visitors could walk on it barefoot. The parking lots should be surrounded by plants and groves to provide shade for the cars. The territory is currently not planted with trees, but through the years it would be necessary to create a densely planted grove. The explanatory notices placed beside the plants on the side of the walkways and in the groves would enable the visitors to get to know the treasures of the nature surrounding them. A study path could as well be set up in the area. One should also take into consideration the unobstructed access to the whole territory so that also the disabled visitors would be able to reach all the services.

For the guests of the camping, as they are also guests of the bath, the easy, quick and controllable access to the bath connected to the hotel should be made available with bracelets.

The following suggestions are made considering the facilities and services of the camping:

- Sanitary units should be put at the disposal of guests according to the number and equipment set down by the regulation;
- The common kitchen should be equipped with ovens, and washing-machines (possibly with coins) in suitable number;
- The buildings should accommodate disabled people;
- The garbage collectors, and other complementary equipment should either be made of natural materials or individual design bearing the characteristics of the bath, however, mainly and foremost practical.

Other additional services suggested:

- Construction of a half covered and wind protected thermal bath of an area of 50-80 m² on the territory of the camping; this pool could be used by the guests of the camping for swimming, while the services outlined in the previous chapter would be available in the bath connected to the hotel.
- Sport equipment rent;
- Rent a bike and service;
- Playground made with natural materials, according to EU standards;
- Internet connections - phone, fax (sending and receiving);
- Laundry;
- Money exchange, gift shop, travel and trip information;
- Extended service café (simple scale restaurant services mixed with bar and café services); According to current trends the offers of reform cuisine should be prioritized beside the traditional cuisine;
- Possibilities for spit cooking, grill and BBQ;
- Animated programmes, bike trips, sports and children programmes.

The above mentioned services can increase the attractiveness/attraction of the camping, the territory of which gets an exclusive and unique structure in harmony with the nature.

6.4. Apartments

The field drawing contains areas marked as B1, B2 and B3 where altogether 15 apartment houses will be constructed with 4-7 living units per house. The leisure and bath facilities have a wide variety of visitors. Apart from the returning guests of the wellness and health hotels there is a well definable and well to do segment of pensioners, who have already stopped their active working life, as well as a middle aged segment, which can afford to spend more time (not only 2-3 days) on a comfortable place where they are more or less at home.

The marketability of the houses grows with the creation of the golf-court; the golf loving mainly foreign guests will buy property as investment in areas quickly developing concerning tourism.

There are many possibilities to sell the apartments:

- after sale to lease back from the owner for a fixed yearly price,

- time share system.

This segment of people prefers ownership, likes to live in his/her own property, to have a social life with people from similar life style, in security, but at the same time does not wish to construct the “holiday home of his life” any more, and does not wish to work in the garden every day. This segment buys apartments which need little expenditure, and enjoys the services offering full comfort (24 hours protection, laundry, cleaning, guarded parking, etc). This apartment house block is an organic part of the holiday resort, however with its particular individuality ensures the attraction necessary for marketing.

Parameters:

15 buildings with the following area division:

The marking of the area on the field drawing	Number of buildings	Size of territory	Size per building	Number of apartments within the building
B1	4 building	8.700 m ²	2.175 m ²	16
B2	7 building	14.000 m ²	2.000 m ²	24
B3	4 building	21.800 m ²	5.450 m ²	24
Total	15 building	44.500 m ²		64

6.5. Private holiday homes

Apart from apartments appearing around holiday resorts with a certain tourism attraction a significant direction of development is the creation of private holiday homes, the owners of which constitute a significant purchasing force as far as the central services of the resort are concerned.

According to the development plan a lake system would be developed after the exploitation of the raw material of the territory, and around the lakes land would be plotted and sold. For the structure of the lake system and the utilization of the territory for the holiday homes two plan versions were created:

Version 1.:

On the central part of the territory a lake system marked as T1 (50200 m²) and T2 (47000 m²) would be created, in the neighbourhood of which plotted land with an average surface area of 667 m² with direct (marked D2, D3, D4, D5) and indirect (marked D1) connection to the lake would be established. The overall area of the holiday home plots would reach 9.6 hectares. In the direct shore track a promenade which fits into the ambience and wooden gang-board with adjustable shape could be created.

Parameters:

The marking of the area on the field drawing	Size of territory	Plotted land
D1	25.700 m ²	34
D2	16.800 m ²	27
D3	18.900 m ²	30
D4	17.400 m ²	26
D5	17.300 m ²	27
Total	96.100 m²	144

II. Version 2.:

In the central part of the holiday resort three lakes (marked as T1-27.100 m²; T2-31.400 m²; T3-33.900 m²) will be constructed with an overall territory of 92400 m², and a 5 metre wide walkway on the shore. Around the lakes 129 plots with an area of 748 m² and with direct connection to the lake could be created.) The overall territory of the holiday homes is 96500 m².

Parameters:

The marking of the area on the field drawing	Size of territory	Plotted land
D1	29.900 m ²	39
D2	32.100 m ²	43
D3	34.500 m ²	47
Total	96.500 m²	129

7. SWOT-ANALYSIS

Before accomplishing the aims of the project from a marketing point of view it is very important to draw up the SWOT-analysis, which identifies the internal strengths and weaknesses, as well as the external dangers and possibilities.

7.1. Strengths

- The investment is realized in the county in the Szigetköz area, therefore it contributes to the decentralization of the national tourism.
- The development assists the prolongation of the tourist-season, as the water-based product can be offered to the guests at the same level throughout the year.
- The offered program packages of project to be accomplished serve the purpose that visitors would spend more than only one day in the area, and use the advantages of recreational programs of 3-5-7-14 days. This would increase both the time guests spend there, and the income from this extra time.

- The tourist organizations of the region supporting entrepreneurs take part in forums and international fairs together.
- The region and the landscape is a very important target area of national tourism, and foreigners also like it because it is easy to reach and close to the borders.
- The viability of the investment is substantially influenced by the economic development of Győr and its area, which is nearby, and the closeness of Vienna and Bratislava. The gigantic investment planned at the Bezenye area, where hotels and casinos would be built, as well as the golf court of international standard with 18 holes planned on the neighbouring site would definitely contribute to the success of the holiday resort.
- The areas are property of the Szigetköz Üdülöpark Kft. company.
- This project would enhance the versatility of the health-tourism products in the Western-Transdanubian region, as there is no resort offering such complex services in the neighbourhood.. At the same time it should be pointed out that the products offered by the Vital Gold Hotel&Spa**** could be seen as appropriate environment for wellness-, active, and golf tourism.
- The local government would naturally benefit in many ways from the operation of the holiday resort, as it would gain additional income from the local taxes, and the unemployment problems of the area could also be addressed (as the human resource need of the resort would amount to 80-120 persons), and at the same time with the accomplishment of the project the subsistence of the entrepreneurs living in the area would be enhanced.
- The area is well developed and industrial, the skilled workforce, usually with language knowledge, is available.
- Tourism is considered as a key sector of the region and the county owing to the spas and health tourism, and this natural potential could be reached in the neighbouring countries at a much higher price and to a much lower extent.
- In case of this tourism product the effect of the seasonal nature can be felt to a less obvious extent, as the therapeutic treatment and the spa-water make the treatment independent of weather and climatic conditions, as well as the use of any fitness, wellness, or conference services.
- The area/neighbourhood is rich in various program possibilities (golf, horse-riding, tennis, gastronomy, etc.).
- The holiday resort aims at a target group of several generations.

7.2. Weaknesses

- The holiday resort has to enter a market which has already been introduced, where its future competitors are well introduced and well known hotels, with recurring guests.

- Ásványráró does not have a national or regional attraction; there is a lack of complex tourism products.
- There is a lack of continuous bike path and service facilities, the bike path attaching the neighbouring villages and Ásványráró can be used, but it is not suitable for longer tours.
- The low water-level of the sub rivers of the Danube is a big obstacle of water-tourism, Ásványráró cannot use its port, there is no possibility to invest in the yacht-harbour.

7.3. Possibilities

- The area has mainly been fitted to serve the need of the water- and eco-tourists, the Vital Gold Hotel&Spa**** resort would create the uniqueness of fitness/wellness and spa services based on special spa water.
- Development of the three generation-service model.
- Anti-stress treatment, manager-test programs, professional tourism, conference-tourism.
- Making use of the subsidy-possibilities between 2007-2013.
- In Germany the subsidy for health-tourism has been stopped, therefore the inhabitants are likely to look for cheaper services than offered there, however, at the same time requesting the same level of services.
- This would be the closest rural “Spa and golf resort” to Austria and Slovakia.
- The tourism-season lasts all year.
- Increase of the inhabitants’ incomes.
- The continuously growing need for wellness hotels and camping sites from abroad.
- The attraction of natural resources is growing steadily, increasing awareness of the environment and health.
- The need for business and conference tourism is growing both in the Transdanubian region, and the regions across the border.
- Emphasis is laid on special services.
- The unemployment of the region decreases, and facilitates the operation of micro and small enterprises involved in the services.
- Increases the income of the local governments and the national budget in the form of taxes and fees.

7.4. Competition and threats

- The health-tourism development of the region.
- Competition is increased by the growth of the attraction of health tourism of Budapest and Western-Hungary.

- The strong value of the HUF undermines the advantageous price/value rate of the Hungarian tourism target areas.
- The developments by foreign, mainly Austrian competitors.
- The competitors of the future, which can be counterbalanced with appropriate marketing strategy.
- Cancellation of the additional services - the cancellation of the building of the golf court, the holiday-homes and the lake system.
- The development can be set back by the procedures required by the geological, mining, environmental and the conservation authorities.

8. COMPETITION ANALYSIS

This chapter examines commercial accommodations of the region with respect to offer and price level.

The characteristics of the most important camping sites of the region

The table below shows the most important camping sites of the region, indicating the prices and the number of places available in 2005, and the category (wherever it exists).

Name of the camping	Category	Place/site	Tent/night/person (HUF)	Camper/night (HUF)	Mobile home/night (HUF)
Vadvíz Kemping és Csónakház (Dunakiliti)	2*	10.000 m ²	Adult: 700 Child: 400		7.875 electricity 350
Aqua Termál Camping és Vendégház (Fertőhomok)	2*	100 persons (4.000 m ²)	Adult: 900 Child: 300		
Aranykárász kemping (Rajka)		7.000 m ²	Adult: 600 Child: 300	1.000	Adult: 600 Child: 500
Kis-Duna Motel és Camping és Étterem (Mosonmagyaróvár)		6.000 m ²			
Pihenő Camping és Vendégház (Győr)	2*	40 mobile homes	Adult: 900 Child: 800		Adult: 900 Child: 800
Castrum Kemping és Panzió (Sopron-Balf)	3*	69 tents/mobile home sites	Adult: 840 Child: 520		
Soproni Ózon Camping (Sopron)	4*	60 camping places	Adult: 1.600 Child: 1.200	Adult: 1.600 Child: 1.200	
Piroska Kemping (Bük)		50 tents	Adult: 1.050 Child: 300		500/nap
Thermal Gyógykemping (Bükfürdő)	3*	150 places, 30.000 m ²	Adult: 5,2 € Child: 2,7 €		Adult: 7 € Child: 5.2 €
Éva-Camping		220 places,	Adult: 800	3610/2 fő	

(Bükkfűrdő)		25.000 m ²	Child: 330		
Thermal Camping Sárvár	4*	89 mobile home places		Adult: 1.800 Child: 1.350	
Termál Camping (Hegykő)	2*	40 places			
Dori Hotel - Camping Restaurant (Fertőd)	2*	200 tents	Adult: 590 Child: 490		Adult: 690 Child: 590
Várkert Thermal Kemping (Pápa)	5*	204 parcels		Adult: 2.100 Child: 1.100	
WF. Szabadidőpark és Kemping (Komárom)	3*	150 tents	Adult: 700 Child: 700	Adult: 1.000 Child: 700	Adult: 800 Child: 700
Solaris Camping (Komárom)	3*	65 mobile homes	Adult: 750 Child: 700		Adult: 1.200 Child: 730
Thermal Hotel és Camping (Komárom)	3*	200 mobile homes/tents	Adult: 1.100 Child: 800		Adult: 1.300 Child: 800
Juno Hotel és Camping (Komárom)		45 mobile homes			

The table shows that in the Szigetköz area there are only small scale, two star camping sites. Higher category camping sites (3-4 stars) can only be found in Győr, Bükkfűrdő, Sárvár, Sopron, and Komárom.

Analysing the prices it becomes obvious that the most commonly used method is to pay for the tent and the mobile home site night by night, and in addition there is a price per person, moreover there are places where you have to pay extra for electricity. The prices paid in camping sites which are built together with a bath include the ticket for the spa, or at least there is a reduction in the price. There are camping sites which operate close to spas and which calculate into their price the ticket for entry.

The prices are very different, but by summing them up the following conclusions can be drawn:

Those who want to stay at a camping site in the Szigetköz area will have to pay a price per person between 600-900 HUF and a tent fee of 300 HUF, while at the same time those who want to set up their tents in a spa area will pay 2000-3000 HUF per person (tent place: 700-1100 HUF, price per person: 800-1400 HUF). It should however be noted that the difference of the price arises from the higher quality services and the reduction/inclusion of the spa entry ticket.

To these prices an additional tourism tax has to be added, which usually amounts to 300 HUF.

The camping sites in the Szigetköz area offer very rich programmes to those who are in favour of activities, while accommodations close to nature and built together or in the neighbourhood of spas belong to the higher category and usually offer wellness as well as sports among the programmes/services.

The characteristics of the - star hotels of the region

The following table shows the hotels of the region, including the primary and secondary competition hotels with the prices for 2006:

Hotel	Season	Single (HUF)	Double (HUF)
Orchidea Wellness Hotel 4*	Main	15.600	26.400
	Pre and post	13.000	22.000
Szidónia Kastélyszálloda 4*	Main	20.800	28.000
	Pre and post	16.800	24.000
Ötvevény-Földváry Kastélyszálloda 3*	Main	10.300	13.000
	Pre and post	9.000	10.500
Hotel Fagus 4*	Main	24.000	29.000
	Pre and post	18.000	22.200
Bio Sport Hotel Lővér 4*	Main	20.500	24.000
	Pre and post	15.500	19.000
Best Western-Pannónia Med Hotel 4*	Main	22.000	24.000
	Pre and post	17.900	19.900
Radisson SAS Birdland Resort & Spa 5*	Main	28.000	34.000
	Pre and post	25.000	29.000
Danubius Health Spa Resort Bük 4*	Main	24.000	31.000
	Pre and post	20.500	27.000
Hunguest Hotel Répce Gold 4*	Main	29.000	39.000
	Pre and post	27.900	37.600
Hotel Rába 3*	Main	18.800	22.300

	Pre and post	14.000	16.200
Hotel Kálvária 4*	Main	19.550	21.500
	Pre and post	18.100	20.500
Princess Palace Hotel Golf & Resort Club 4*	Main	22.000	30.000
	Pre and post	19.000	26.000

On the basis of the list it can be seen that there is a great distinction among the published prices. Hotels mainly sell their services in packages; therefore the above prices can lead to very careful and very limited conclusions.

Package prices

The table below summarizes the package prices of the competitors for 2006.

Hotel	two-night package price (HUF/p.p.p.)	seven-night package price (HUF/p.p.p.)
Orchidea Wellness Hotel 4*	44.900 (3 nights)	77.500
Szidónia Kastélyszálloda 4*	60.000	107.000
Öttevény-Földvály Kastélyszálloda 3*	37.000	59.000
Hotel Fagus 4*	34.900	84.000-118.000
Bio Sport Hotel Lövér 4*	33.200-35.000	98.000-114.000
Best Western-Pannónia Med Hotel 4*	24.400-39.900	73.000
Radisson SAS Birdland Resort & Spa 5*	39.000 - 59.000	156.000 - 171.000
Danubius Health Spa Resort Bük 4*	30.000-35.000	109.000-130.000
Hunguest Hotel Répce Gold 4*	61.000	151.000
Hotel Rába 3*	22.900	57.000
Hotel Kálvária 4*	16.200	102.000
Princess Palace Hotel Golf & Resort Club 4*	42.000	133.000

The two-night package price generally includes half board accommodation, relaxing or aroma-massage, the use of the bathing facility of the hotel, sporting possibilities, use of bath robe.

The seven-night package price generally includes half board accommodation, medical consultation, 5-9 treatments depending on the hotel, the use of the bathing facility and the sauna of the hotel, sporting possibilities.

Examining the service-packages of the hotels the following packages are used independent of the type of the cure:

- 2 nights
- 3 nights
- 7 nights
- 14 nights, combined package

The service packages all include above accommodation half board meals, full scale spa/bath services, medical, wellness consultation, bath robe and subject to the package wellness or beauty treatments.

At the analysed hotels the reduction from the price rate of the room reached 40-60% in case of a package of 7-14 nights, 25-30% for 2-3 nights.

The services which could be used by the guests free of charge usually included wellness services (sauna, bath) and various sport possibilities. The table below shows the individual and versatile services the hotels are aiming at creating for a wide range of possibilities:

Name of hotel	Other services	Other	Capacity
Orchidea Wellness Hotel 4*	Rowing, football, horse riding, hunting, tennis, bicycle riding, treatments	Conference room (from the restaurant): for 50 guests, restaurant: marriage ceremonies for up to 300 persons	35 (single to 5 beds)
Szidónia Kastélyszálloda 4*	Szidónia Manó Klub (Troll Club)	Conference room: 6-100 persons	32 rooms (64 places) (13 double, manor house, 6 double bed halls)
Ötvevény-Földváry Kastélyszálloda 3*	Massage, tennis, bicycle riding	Conference room: 60-40 persons	18 rooms 9 double bed, 7 three-bed, 2 four-bed (47 places)
Hotel Fagus 4*	Wellness and beauty	Conference room (maximum 432 persons, can be combined), swimming pool,	147 rooms (128 deluxe (double), 5 apartments, 2 disabled, 10 suites, 2 presidential suites)

		fitness, massage, salt cave, cosmetics	
Bio Sport Hotel Lővér 4*	Sauna, solarium, health and beauty centre	Conference room: 20-180 persons	single: 15, double: 130, superior: 10, standard: 27, apartments: 3
Best Western-Pannónia Med Hotel 4*	Dentist, plastic surgery treatment, beauty farm, billiard, wellness: swimming pool, sauna, bubble bath, fitness	Conference room: 8-300 persons	62 rooms (5 single, 22 double, 19 comfort double, 8 antique double, 4 family 4 bed)
Radisson SAS Birdland Resort & Spa 5*	Beauty salon, fitness, wellness, sauna world, pools, golf		Resort Wiew, Superior Wiew three-bed, Resort, Delux suite (4 persons)
Danubius Health Spa Resort Bük 4*	Beauty salon, fitness, wellness, health services, Thalasso therapy	Conference (30-180 persons, 6 rooms, combinable)	20 single/180 double
Hunguest Hotel Répce Gold 4*	Health services, wellness: sauna, solarium, salt-chamber, bubble bath, manicure, playground, billiard, darts	Conference: 100 persons	165 double /8 apartments , 4 VIP apartments with bubble bath , 6+6 family , 2 disabled
Hotel Rába 3*	Sauna, solarium, beautician, massage, hairdressers, fitness, rent a bike	Conference: (15-120 persons, 6, combinable)	single: 27 + 13 superior, double 30 + 64 comfort, suites: 21
Hotel Kálvária 4*	gym, solarium, sauna, massage	Conference room: 80 persons	72 places (38 rooms)
Princess Palace Hotel Golf & Resort Club 4*	golf (9 holes, 14 ha), motorboats, fishing, hunting, bicycle, horse riding, squash, billiard, kids' snug, water sport, massage, beautician, hairdresser	Conference room (12-60 persons, 4 rooms)	17 double, 4 suites, 1 presidential suite

Looking at the table it becomes obvious that in the frame of services which have additional charges there are further wellness services (fitness room, massage, beautician), treatments, special sports (golf, motorboat, horse riding, ...) dentistry. Every hotel has a conference room; the rooms usually hold at least 100 persons, but one can also find smaller consultation rooms for 6-8 persons, and the larger hotels usually have conference rooms for hundreds of guests.

The characteristics of the holiday villages of the region

The table below shows the prices and the services included in the holiday villages in the neighbourhood of Ásványráró.

Name of holiday village	Village/settlement	Price per room	Services included in the price
Szigetköz Konferencia és Wellness Hotel Dunakiliti 4* (Conference and Wellnes Hotel)	Dunakiliti	Apartments: 14500HUF (01.01-23.12.), 16500HUF (24.12-4.01.); double: 11500/13800, p.p.p.; pension room: 7000HUF/p.p.p. child reduction: between 4-10 years: 50%	plage, sauna, swimming pool, scenery pool, volley ball, breakfast, playground, fitness room
Achilles Tó Szabadidőpark és Üdülőfalu (Lake and holiday village)	Győr	Pre and post season: single: 8000HUF; double: 9000HUF; family (4 persons): 14000HUF; VIP with French bed: 12500HUF, grande famiglia: 17000HUF Main season: single: 10000 HUF; double 11500 HUF; family (4 persons): 15900 HUF; VIP: 13000 HUF; grande famiglia: 18900 HUF 18900	plage, breakfast
Termálvölgy Üdülőfalu (Spa valley, holiday village)	Zalaszentgrót	Finish: December 2008	grill, fireplace for baking bacon, garden
Cseszt-Regélő Szabadidőpark és Sportcentrum (Leisure park and sportcenter)	Csesztreg	Pre and post season: Room with more than one bed: 1800HUF/p.p.p.; suite: 10000 Main season: 3000 HUF/p.p.p.; suite: 15000	
Novákfalva Üdülőfalu (Holiday village)	Velem	9980/2 persons (extra bed: 2500/p.p.p.); large family: 35000/10 persons (+2 extra beds) child reduction: until 2 years free; until 12 years: extra bed 1200 HUF	
Zala Spring	Zalacsány	Finish: 2008.	Spa and wellness

Resort 4* (5*)			centre, golf court, wine yard and wine club
Várgesztes Villapark	Várgesztes	Pre and post season: 42800 HUF/90800 HUF Main season: 123200 HUF/329000 HUF 29.12-01.01: minimum 4 nights: 192800 HUF/404000HUF	
Panoráma Residence Duna 5*	Dunaszentmiklós	Pre and post season: 27000 HUF (4 persons)/39800 HUF (6 persons) Main season: <u>27:39600/53000???</u>	

All in all it can be concluded that a double bed costs around 10000 HUF (for two persons), but there are also holiday villages where one can find apartments for 4-6-8 persons. It should be mentioned that during the Christmas and New Year period the prices used are the ones used for the main season. The names of holiday villages under construction were also mentioned, together with their places and capacities, as well as the time of finish of the construction works. The prices usually include wellness services, the possibility to use the sport field and the equipment, according to the characteristics of the resorts (eg.: golf).

The extra services include possibilities for various leisure activities (disco, animation, extreme sports, etc.), as well as programs close to the nature (walking, trips, water sports). As far as capacity is concerned it can be said that in the region of Szigetköz the most common form of accommodation in holiday villages are apartments, which are able to put up between 30-40 people are, while in Velem there is a park for 150, in Várgesztes for about 1000 and in Dunaszentmiklós for up to 300 people. It should also be emphasized that the above mentioned holiday villages are able to satisfy all the needs of the guests and are able to provide various possibilities for spending the leisure time.

9. MARKETING PLAN

As far as the characteristics of the facility are concerned the followings should be emphasized:

A holiday resort of European standard will be erected, which is able to provide excellent recreational, adventure, wellness and sport services. The development creates the hotel with 97 living units/quarters, with an adventure bath and the services connected. Parallel with the development holiday home plots will be sold around the two lakes, in the second phase another 80 rooms of the hotel will be constructed, as well as a golf court, by which complex offer packages will be made available.

The hotel fits into the environment and atmosphere of the landscape, by both strengthening and accentuating it. With common programme organization it will be possible to lessen the territorial concentration.

9.1. The positioning of the new hotel and camping

As a result of the national and international market surveys the hotel aims at the creation of such products and product structures, which are based on several factors as elements to offer (thermal water, golf court, natural environment). The main product of the investment is the thermal water so with the programmes concentrating around health care and wellness services the hotel can reach remarkable market shares. With quality exceeding the standard of services offered by the existing hotels of the region and using lowered prices the holiday resort can achieve a significant circle of guests. From among the future services the hotel will build its marketing strategy on wellness treatments and fitness services, as well as the conference capacity. Considering the target group the hotel would like to reach well to do tourists, both domestic and foreign, including all generations, who like sports, a healthy lifestyle and who have a preference for active recreation. With the adventure bath the hotel considers families with children as well as women in their thirties looking for wellness services, not to mention the 50sh and 60sh generation.

With the disappearance of Europe's borders and with the entry of the states of Central Eastern Europe into the European Union, a green corridor, connected by clean and intact natural parks and thermal baths, will be created instead of the Austrian, Hungarian, Slovakian and Slovenian borders, which will comply with the needs of the middle and higher income classes, who are conscious of their health and look for treatment. This area has tourism potential throughout the year in the field of thermal and cultural heritage, as well as in the field of active tourism with its offered developed especially for a variety of target groups and with a huge diversity of services. Conference tourism is also based on these considerations, as

well as wine and gastronomic tourism. The preservation and development of the specific treasures of the settlements is ensured by village tourism.

The various services complement each other, so the overall tourism offer of the region provides a complex unit. Among the above concept health tourism can clearly be appointed, as it well connects with the cultural and gastronomic offer of the region.

9.2. The description and the quality of the target groups

It can be taken for granted that both domestic and foreign market will prefer more and more the tourism services offering personal benefits connected with improving health and better feeling.

According to the forecasts concerning domestic demand the frequency of the visits can be increased for the groups coming from a longer distance, and 1-2 week long holidays will not become popular in Hungary in the forthcoming years.

There will be a strong differentiation process in the demand for health tourism, and particularly within it for health, thermal, fitness and wellness tourism. The following trends will characterize this process:

- the well to do younger generation representing a growing market share will use fitness and wellness services,
- families with small children, representing a smaller share will visit the adventure baths,
- the middle aged population will use the services of the bath concentrating on recreation and prevention.

These groups are potential target groups. In the more developed countries social security puts more and more emphasis on prevention, these target groups can expect not only an increase in the number of people taking part, but also the growth of purchasing power.

In accordance with world tendencies health tourism based on traditional healing methods can expect further increase. The utilization of the possibilities is essential regarding the services connected to the baths. The most significant group, who will make use of classic health tourism services are the elderly, whose period of stay will be longer as an average course lasts for 2-3 weeks.

The fact that both doctors and patients put more and more emphasis on natural healing methods (drinking spa water for certain illnesses) is an advantageous

tendency, the intensification of which promises a secure demand in the long run both for thermal and health spas.

The target groups of thermal and adventure bath include both the young and the old, in accordance with the current demand trends. It is a Hungarian peculiarity that by increasing the standard of living of the population and with a possible role played by the state in influencing and opinion shaping (MT Rt/marketing, holiday cheque/accommodations) the already increasing demand can further be strengthened.

The situation of the individual segments will show the following development:

- The younger generations will mainly use fitness and wellness services, and the demand for them increases further. People will not look for treatments, but for preventing and avoiding the development of illnesses. People will want to remain healthy, keep their mental and physical fitness, their condition and their performance. The market share of this age group is steadily increasing.
- The young families with little children will choose the services of the adventure bath connected to the hotel mainly as a place for their second or third holidays. A group of services offering rest and recreation also for young parents is a great advantage, mainly by offering programmes for the children (this would ensure rest for the parents). The market share is still low, however the tendency is promisingly increasing, yet the domestic quality offer is still relatively narrow. As far as demand is concerned the population of the region can play a decisive role in this segment.
- The middle aged mainly visit the health and thermal baths for prevention. A decisive factor for this target group is the versatility and flexibility of the health preserving and “maintaining” services, which are not connected only to the water and can also be combined with training and education. This is the main market of wellness, and their share is dynamically increasing both in number and in purchasing power.
- The elderly or the sick look for traditional health treatment, and the main purpose of their stay is to moderate or get rid of the illness or possibly the pain. Because of the longer stay the selection and environment of programmes which can be found in the holiday resort and its surroundings is of high importance (aesthetic environment, peace, culture). The courses are repeated several times, therefore the returning guests are quite common, for whom the friendliness, the behaviour and the helpfulness of the staff play an important role. This target group is the largest consumer of health tourism. The European society is characterized by aging, so the demand will continue to grow.

The geographical situation of the settlement, its accessibility, the sights in the neighbourhood, and the tourists arriving at the region for other attractions will all determine the nature of future visitors of the holiday resort. Below on the basis of

the above mentioned aspects there is a presentation of the segments the bath could count on:

9.2.1. Health tourism

The above presented target groups create the most important visitors of the bath resort. They are the ones who mainly come for the healthcare facilities, for the healing power of the water and will also take advantage of the accommodation possibilities. All generations can be counted upon, considering the period of stay the younger generations will usually stay shorter (1 night or for a couple of nights) the middle aged and the elderly will stay longer (1 week or even 2-3 weeks), and will look for the other sights of the region in a complementary manner.

It is also a characteristic feature that the younger visitors, who stay for a shorter period come usually from the region or other neighbouring regions, the ones who stay for at least a week come either from other regions of the country or from abroad. As far as foreigners are concerned Austria and Germany and using the closeness of the Schwechat (Vienna) and Bratislava (Vienna) airports, Scandinavian countries, Italy, the Benelux, Possibly France, Switzerland, and Spain should be targeted.

9.2.2. Fitness-Wellness tourism

Wellness tourism can target mainly the middle and the top managerial layers and their families by offering family and prevention programmes. Programmes developed especially for women, taking into account domestic and international trends, can also access a significant segment. When compiling the wellness packages it is important to put special emphasis on seasonality. We consider that with programmes connected to wellness and health preservation the hotel will be more active and this will result in a significant additional demand. According to forecasts the importance of the segment, even though it will be significant from the beginning owing to the services offered by the adventure bath, can expect further growth in the proportion of hotel income.

The domestic target groups should pay extra attention to the inhabitants of Budapest. It is a special characteristic of Hungary that due to the decentralization of economic and commercial activities the number of the inhabitants of the capital is gradually decreasing. However, it should be noted that among the population of Budapest the young, who chose to move for subsistence reasons, represent a high portion. They have a stable financial background, and when spending their holidays they have a relatively higher quota for tourism, they are sufficiently mobile to use facilities which could be accessed on public roads within 2.5 hours even for a weekend or to spend and visit for just a few days.

9.2.3. Professional tourism

The project puts special emphasis on building the conference capacity. The conference room, which can be divided into smaller rooms, and in an open state can accommodate up to 300 persons can compete well with the capacious conference rooms of the region.

The conference room will be able to comply with a variety of needs from larger conferences to group training to smaller conferences and directorate meetings. Selling 1-2 night long conference and meeting packages the hotel can fill in the weekday gaps of health tourism.

For the operation of the hotel it is advantageous that the programmes take place outside the main tourist seasons, and are mainly organised during weekdays so the continuous booking of the hotel and the marketability of the programmes is connected. The average spending of the visitors taking part in programmes is according to domestic and international experience three times higher than that of the average tourist spending.

The hotel and the holiday resort to be constructed in its surroundings makes use of the possibilities offered by the three borders, the easy accessibility and the advantageous price level.

9.2.4. Golf tourism

In medium and long term the 18 hole golf court to be constructed on the neighbouring plots will have a significant effect on the usability of the holiday complex and that of the hotel. The golf tourists have similar characteristics as those taking part in health tourism, however represent only a small segment. In countries where tourism is the main source of income the establishment of golf courses plays a strategic importance. Several countries institutionally support developments concerning golf in order to increase tourism attraction and income, and prove at the same time that inclusion of the public sphere can induce the golf industry.

Since the golf tourists visit the chosen court several times a year, they decide to buy property. This possibility is provided by the building of the apartment houses.

In Hungary the days suitable for golf reached approximately 220 days a year, almost 100 days less than in Mediterranean countries. Therefore it is essential to connect golf with other tourism offers, like the services connected to thermal water, in which Hungary has a leading position in the region, as well as with health tourism, cultural sights, horse tourism or wine and gastronomic tourism. It is even more important because golf players like to take along their non golf playing relatives on trips abroad, for whom it is always worth offering a wide selection of programmes. It is also important to have more golf courts in the neighbourhood (Dunakiliti, Bükkfürdő) which enables the golf players to visit several courts during their stay.

9.2.5. Other tourists

This segment includes the walk-in and bike tourists, the tourists visiting the town or taking part in cultural events, those involved in a certain branch of eco-tourism and water tourism, and those who prefer wine and gastronomy. This segment is minimally represented in the hotel sector, and their development can be expected to a small extent, however do not significantly influence the operation of the hotel.

9.2.6. Seasonality

The hotel similar to health resorts will be affected by seasonality to a lower extent than average hotels, however seasonality can be observed at the various market segments both at monthly and weekly level.

Market segment	Seasonality
Health tourism	In the summer during warm/hot months (July-August) and except for November-January in the winter, throughout the year. Long stay (7-14 days).
Fitness-Wellness tourism	Throughout the year continuously, especially during long weekends connected to holidays. Short stay (2-3 nights - from Friday to Sunday)
Professional tourism	Except for the winter and summer months throughout the year. Short stay (1-2 nights), and programmes are usually organised during the week.
Golftourism	From April to November depending on the weather.
Other	Changing

9.3. Products

In the first part of the development process a facility is created which can achieve high usability owing to its complexity and can realize a higher added value as a result of the composition of its services.

the targeted visitor segment of the development:

- the young with or without family,
- the 50+ visitors
- businessmen, seminary, training, education and events.

The creation of the distinctive characteristic and the attraction of the hotel, is a basic condition for getting the tourist to the scene. These purposes are served by two pillars of the facility:

- the well detached unit serving regeneration,
- the units serving active recreation and entertainment.

It will be the task of marketing to create a complex service package, which combines the programmes inside and outside the hotel. Further packages could be created by combining business tourism with lifestyle training (eg.: wellness services in reduced price packages offered for the wives of businessmen, etc).

Within the borders/walls of the hotel a new interactive world can be created, the personification of which will be the animator, who can add extra taste to family bathing, by offering child care, and even whole day programmes can be organised with the animator's participation.

9.3.1. Service packages

Adjusting the offer under one creative title:

- Adventure-sport: fitness room, squash courts, active sports (cycling, tennis, water sports);
- Pampering: massage, aromatic bath, herbal poultice, fit-menu;
- Regeneration: program according to medical advice, massage, pedicure, cosmetics;
- Knowledge: conference room, baths, business-menu;
- Fit-for-job: anti-stress meditation, aromatherapy, relaxing massage.

Other factors influencing marketability:

The uniqueness of the offer can well be guaranteed by good ideas, however, the atmosphere of the hotel has a significant effect on the satisfaction of the guests. The following solutions can make the interior of the bath more attractive:

- involvement of an interior designer to arrange the common areas, the furniture and the lights;

- the themes of the corridor pictures: the beauties of the region, flowers, dynamic pictures of the Szigetköz,
- palm plants in the bath.

9.3.2. Programme marketing

In the business mix of the building complex (hotel and bath) the business and the programme segment get a more significant role than traditionally. In the separate extra rooms of the restaurant there will be possibility to have separated meetings, trainings, seminars, to which bathing can be added as extra service. The task of programme marketing will be to introduce this new motive to the market, and there is a strong possibility to gain ground in this segment because of the presence of several larger companies in the area. The current offer does not provide competition in this area, therefore the aim is market lead position. For programme marketing the habits of the certain target groups were evaluated, as well as their expectations concerning the events. Some events can be organized in cooperation with the organisation of the target group.

Possibilities

- Seminars + bathing and sport,
- Seminars + bathing and sport,
- Evening and night events + bathing,
- Family and friend programmes.

9.4. Price calculation

The average price per room, and the price of the services was deduced from the price rate established on the basis of market data, information gained from personal discussions, and experiences gained in Hungary, and was calculated on detailed booking data and the composition of guests.

The price level of the hotel and the camping and its efficient use is an effective positioning means of marketing. The quality positioning of the hotel among the existing competitors requires the establishment of a competitive price level, which does not entail only marketing advantages, but also establishes an efficient market segmentation, as well as decreases the importance of seasonality and creates the possibility for profitable operation.

The income of the hotel is based on three pillars:

- determination of the price level of the hotel,
- the mixture of services, and
- the visitors' willingness to spend.

At the same time it can also be observed that these three factors are closely bound, which could be characterized by the following slogan in the most appropriate way. The principle of price setting is winning the guests, attracting them and keeping them for a longer term.

So the main aim is to attract the guests to the territory of the holiday resort and the services already available can be sold more easily. It is essential that the guests use as many services as possible.

The calculation of the revenue/income is also based on the following concept: how much one guest spends on the various services during a whole day stay.

The following table contains the prices of rooms calculated on the basis of the previously outlined price per segment and the occupation/booking of the rooms, and the composition of the guests, as well as the average yearly booking/occupation:

Year	Average price per room (HUF)	Occupation/booking (%)
2009	10.800	40
2010	11.340	45
2011	11.910	50
2012	12.500	55

From the targeted guests a larger portion will arrive during school brakes, weekends and holidays, so in these periods there is a possibility to set higher prices, while for working days and especially at the beginning of the week these prices could be lower. The price of the room is affected by various factors, which should be examined one by one.

The introduction of the product could last two years. The price advertised cannot be realized for several reasons and depending on business policy, so the different consumers pay different prices for the services required.

9.4.1. Price differentiation

In a hotel different prices can be realized in different market segments for different consumers even within one season:

- The so called walk-in guests who arrive without pre-booking are probably willing to pay the list price.
- The number of those arriving with individual booking steadily increases, thanks to the electronic information system. With these guests it is more difficult to realize the full price, and modification of the price could also be used as a means to attract loyalty.
- Service providers show their appreciation towards regular guests with a lower price or extra services.

- For conference, business and training this reduction is lower, however winning this segment is a strategic task.

Travel agencies as clients remain important even in this field of tourism. Higher volume and trustworthiness can compensate the relatively larger reduction.

9.4.2. Paying condition

Booking guaranty:

- For main seasons a booking advance fee should be paid which equals 25% of booking.
- Organizers of seminars should pay 50% of the ordered price.
- Conditions of cancelling: in main seasons the cancelling period would be 2 weeks in advance without penalty.
- Full scale acceptance of credit cards.

10. HUMAN RESOURCE PLAN

The greatest expectation of the structural model is, that it should facilitate the effective running of the holiday resort. The operation of the hotel, the bath/spa and the camping will be realised within an economic association. Independence in itself carries responsibility and accountability, which has the following advantages:

- Obligation of cost-effectiveness/cost-saving,
- An entrepreneur approach oriented at income and return,
- Proprietary approach,
- Avoidable administrative problems,
- Clear picture of expenditure and income,
- The expenditure does not get mingled with the subsystem of the institution system.

The human resources get a key position in the establishment and development of every organization and company, its management is inevitable from the point of view of creating corporate culture. To establish the appropriate human resources the activities of the company are examined, and well assigned posts are created. Then it should be analysed what kind of personal conditions are necessary to fill a position, and then the scope of activities are harmonised with the personal conditions. Not only the appropriate amount of workforce is necessary, but also the appropriate quality. In order to achieve this, the instruments of human resource management have to be applied accordingly.

The main areas of human resource management -which should be analysed and which will be carried out by the management one month prior to the opening of the institution - are the following:

- creation of the scope of activities: determination of the operational activities, assigning, grouping these activities to the scope, creating a working-hours management plan;
- scope analysis: determination of the tasks, responsibilities, examination of the necessary qualifications and skills, determination of the salaries and allowances in connection with the position;
- scope of activity-planning: structuring the scopes in such a way which will result in optimal performance and satisfaction at the same time;
- working-time management: working-time management of co-workers, description of working-time, determination of labour rules;
- guarantee for human resources: the future use of human resources in a cost efficient/saving manner, and possibilities for further development (stimulation, performance evaluation, education);
- labour-force planning: estimation and supply of the human resource demand (recruitment, selection)

In the table below the labour-force structure necessary to operate the hotel, the bath/spa and the camping are summarized according to scopes of activity and areas:

Organisational system and management

Operational part	Management number	Staff number
Directorate	1	1
Central part	1	13
Technology, security	1	8
Human resources	-	1
Accounting controlling	-	2
Sales, marketing	-	2
Bath/spa	-	10
Bath/spa skilled work	-	3
Bath/spa unskilled work	-	3
Wellness and Beauty	-	4
Hotel	-	14
Housekeeping	-	8
Front office	-	6
Camping	1	1
Head of camping	1	-
Service and sales area	-	1
Catering	1	19
Food and beverage management	1	-
Cuisine	-	8
Sales area	-	9
Restaurant board	-	2
Summary	4	58

* management and deputies included

The holiday resort will have 4 employees in the management and 58 assistant employees. This means employing 62 employees in the staff. This number does not include the common cleaning of the hotel and the areas of the common facilities of the bath/spa, neither does it cover the employees keeping in order the external open areas and the areas of the garden; these employees will be employed by an external firm specialized in these activities. These activities will be allocated to an external business. Even in case of the common or unit by unit operation of the hotel and the camping the common financing of technical, sales and catering activities can also be arranged according to cost-effectiveness aspects.

Below the scopes are indicated according to areas:

Directorate (2 persons)

 Executive director: 1 person

 Secretary: 1 person

Technology, maintenance, security (9 persons)

 Technical director: 1 person

 Technical maintenance (hotel and camping): 4 persons

Security staff (hotel and camping): 4 persons
Human Resources (HR) (1 person)
HR: 1 person
Accounting, controlling (2 persons)
Accountant: 1 person
Controller: 1 person
Marketing and sales (2 persons)
Marketing staff: 1 person
Sales and program-organizer: 1 person
Hotel (14 persons)
Cleaning staff on the floors: 8 persons
Portiere, receptionist, cashier: 4 persons
Bellboys: 2 persons
Bath/spa (10 persons)
Swimming instructor: 3 persons
Information, checkout: 2 persons
Changing room attendant: 1 person
Wellness and life-style advisor: 1 person
Wellness section employee: 3 persons
Camping (2 persons)
Head of camping: 1 person
Reception: 1 person
Catering (20 persons)
Catering (Food and beverage?) manager: 1 person
Waiters, counter: 9 persons
Cooks: 3 persons
Confectioner: 1 person
Kitchen staff/aid: 4 persons
Cleaning staff: 2 persons

Before operation starts during the pre-opening period the following scopes of activities are necessary for successful marketing and development:

- executive director,
- secretary,
- financial manager,
- sales and marketing manager,
- marketing assistant,
- technical director.

One month prior to becoming operational accurate descriptions of scopes and responsibilities are given, in which the operational and organization rules of the hotel, the bath/spa, the camping, the catering facilities and other services will be regulated, such as: opening hours, statuses, duty-list, leaves, responsibilities, key regulations etc., the managers of the certain areas are responsible for these rules.

10.1. Structure of the human resources

Filling the manager positions, such as the heads of the following areas: head of sales, technical manager and chief-accountant have to be arranged before opening.

- Technical manager: from the 365th day prior to opening
- Head of sales: from the 365th day prior to opening
- Heads of sections: from the 200th day prior to opening
- Chief accountant: from the 180th day prior to opening

Employees:

- Heads of sections (hotel, camping, bath/spa): from the 90th day prior to opening
- Others: from the 30th day prior to opening

10.2. Scope of activity planning

Analysing the scope of activities enables the organisation to develop the context, functions and connections of the activities, so that they could serve both reaching the organisational targets and fulfil the needs of the employees. Planning the scope of activities means structuring the scopes in such a way which will result in optimal performance and satisfaction, at the same time.

Specialisation is beneficiary from the point of view of efficiency, as the well practiced and simple work phases can be carried out more efficiently, however it does not meet the needs of the workers. The monotonous nature of the work can influence working morale and can lead to extreme fluctuation of the workforce. In order to solve these problems the rotation, extension and enrichment of the scope of activities could be usefully applied.

It should also be mentioned, that extension or rotation of the scopes does not only have positive effects for the employees, but it also increases their responsibilities, therefore it is necessary to examine the expectations of the individuals, their willingness and their ability to take responsibilities.

The modern approach points out scope of activity enrichment as the best possible solution. Enriching the scope of activities also deepens the scope, which can be a long-term solution, highlighting the versatility of tasks, the possibility to identify them, their importance, their autonomy and the opportunity for feedback. These elements should be underlined and these dimensions have to be developed in an appropriate manner. The enrichment of the scope of activities can be applied and is worth applying for those who wish to get promoted and their need for development that so requires and advances.

An important element of planning the scope of activities is working-hours management plan, which is discussed separately because of its significance.

10.3. Working-time management, labour rules

As a following step of the scope of activities planning the working time management of human resources has to be developed. This plan contains the time-management of the resort's employees, the description of working-hours and the labour rules.

10.4. Inspiration

In order to further the aims of a given organisation inspiration has to fit in closely with the strategy of the organisation. The first requirement towards inspiration system is to harmonise the salary with the work carried out, furthermore it should be fair with respect to the other work carried out in the organisation.

10.5. Development, training

Development and training gain their significance in case of internal recruitment, since if the labour-force problems are to be solved by using internal work-staff appropriate training, courses and proper education has to be ensured for them.

10.6. Evaluation of performance

Evaluation of performance is a key element in human resource management. The possible criteria can be as follows: qualities, results, behaviours, activities in connection with the scope.

The development and introduction of a performance evaluation system requires careful balancing, the main aspects of which could be as follows:

The evaluation of external and internal environment, basic planning/design parameters (what should be evaluated?; which evaluation techniques should be used?; who should evaluate?; how often should evaluation be done?)

From the point of view of the employees the use of performance factors (quality of work, professional work, speed, willingness to initiate, adaptability, communication skills, behaviour) for evaluation seems practical from among the evaluation methods.

11. RISK ANALYSIS

11.1. Investment risk

11.1.1. Time factor

The construction of the hotel and the camping can be started independently from the other elements (apartments, holiday homes, lake system) of the holiday resort, however it should be taken into consideration that the exploitation of the gravel layer would take several years. As main entrepreneur of the investment a group of experts should be chosen who were main or sub contractors at the construction of hotels of similar size, so possess the necessary expertise and experience to forecast the time necessary to carry out an investment of this scale.

11.1.2. The cost-risk

The cost risk is closely related to the time factor, the prolongation of the investment duration and the change of project during construction increase the expenditure significantly.

11.2. Operational risks

11.2.1. The appropriate demand

There are several four star wellness hotels in the area and also in Hungary, however the accomplishment of such an investment is supported by the availability of thermal water, the accessibility of the project site as well as the versatility of the services both in Hungary and in Austria and Germany.

On a yearly level wellness hotels work at a capacity above 45-50%, while health resorts with about 60%. In the Western-Transdanubian region this figure reaches 70% depending what other attractions can be found in the area.

During the calculations the price per room was calculated at lower average price than the prices of four star category hotels of the region.

11.2.2. The risk of correct forecasting of expenses

In the financial plan the operational data of hotels and camping sites were used as bases. For the hotel the highest expenses can be expected for energy and salaries/wages.

11.2.3. Market risk

In Hungary the hotel industry is characterised by strong competition, which might further be increased by the holiday resort. The country image campaign advertising the new image of Hungary has, however, been started, and this new image focuses on domestic health tourism creating thereby a demand for further investments and developments.

12. FINANCIAL CALCULATIONS

The aim of the financial analysis is to show the expected effects concerning the profitability of the hotel and the camping construction.

The investment costs will be examined, as well as the income and expense factors during operation, and on the basis of these the Gross Operating Profit, which indicates the results of operation in a limited way. Then the recovery calculations will be carried out.

First the financial resources of the investment will be surveyed for 15 years starting from the beginning of the construction - for the hotel starting with 2008 and for the camping starting with 2007 -, then the examination of the revenue/income will be carried out. Then a detailed analysis will be given of the expenditures, surveying the specific variables of both income and expenditure.

Then the result-plan of the project will be presented, which also includes the cash-flow plan (financial sustainability), and finally the recovery calculations will be shown.

12.1. The extent of investment, financial resources

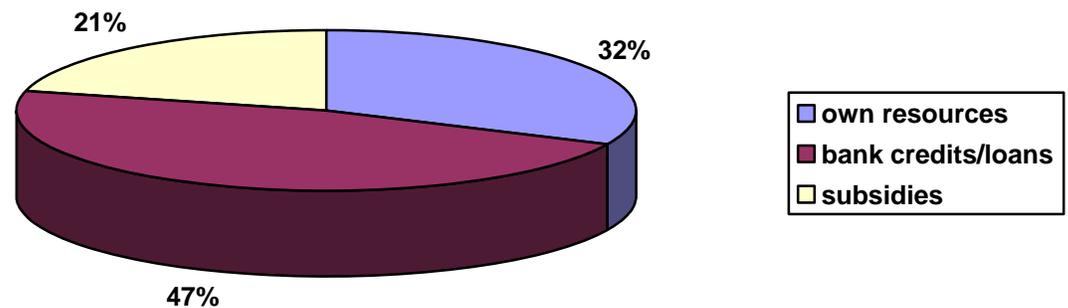
On the basis of the 3rd chapter of this study the expected cost of the hotel is 2.400.000.000HUF.

In the calculations the investment was financed in the following way:

- 32% of the investment, namely 760.000.000HUF own resources;
- 21% of the investment, namely 500.000.000HUF subsidies;
- 47% of the investment, namely 1.140.000.000HUF bank credit/loan.

For the bank credit/loan a foreign currency loan with 5% interest rate, for a credit period of 10 years, with 2 years of period of grace was used for the calculations.

For the hotel the division of the resources is shown by the following chart:



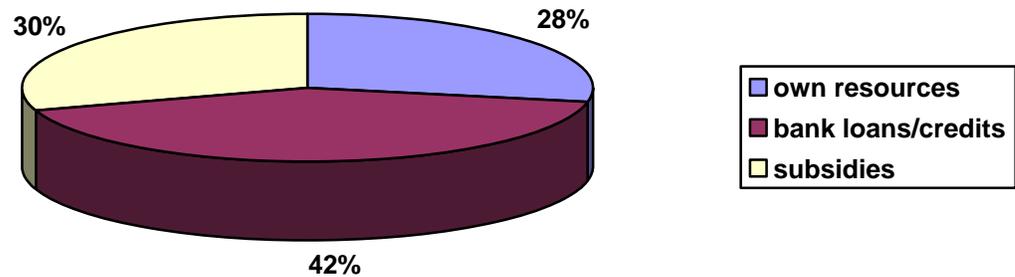
On the basis of the 3rd chapter of this study the expected cost of the hotel is 417.500.000HUF.

In the calculations the investment was financed in the following way:

- 28% of the investment, namely 117.000.000HUF own resources;
- 30% of the investment, namely 125.000.000HUF subsidies;
- 42% of the investment, namely 1.140.000.000HUF bank credit/loan.

For the bank credit/loan a foreign currency loan with 5% interest rate, for a credit period of 10 years, with 2 years of period of grace was used for the calculations.

For the camping the division of the resources is shown by the following chart:



12.2. The estimation of operational income

For the hotel the operational income/revenue can be divided into the following groups :

- Room income
- Food and Beverage income
- Wellness and sport income
- Leasing income

The planned incomes are based on the marketing prognoses. The dynamic increase of incomes is planned from the first three years of the period. The increase of rate is expected from the increase in the number of visitors.

The fluctuation of the occupancy rate within a year can cause temporary and smaller liquidity problems, to overcome these can be solved by contracts with the account-holding bank.

12.2.1. Revenue per occupied room:

To establish the revenue from accommodations the following data was used:

- the hotel has 80 rooms, 15 apartments and 2 suites which are at the disposal of guests for 365 days a year;
- the capacity utilization is 40% in the first year and is planned for 65% in the future;
- based on these assumptions the number of tourism nights/nights spent is 31 478 in the first year, and with 65% of capacity utilization 51151;
- the net price per rooms is 10 800HUF, for apartments 17 000HUF and for suites 32 000HUF per night, which includes the utilization of the bath and the breakfast;
- the price of rooms, apartments and suites increases yearly by 5%;

The utilization of the same category hotels is above 60%, at well operated places this goes beyond 70%. The hotel has a good chance of 40% utilization in the year of the opening, which might reach 50% by the third and 60% by the sixth year.

12.2.2. Food and Beverage income

To establish the revenue of catering the prices were set along the following lines:

Lunch: 2.200 HUF

Dinner: 2.500 HUF

- The breakfast is included in the accommodation fee. For the sake of the calculation dinner was assigned to 50%, lunch to 30% of the nights spent.
- The F&B revenue also includes the income from the restaurant for 60 persons, for which a daily average a la carte consumption of 70 persons for 3000 HUF was calculated.
- The beverage income was calculated as 20% of the food income.
- Apart from the hotel guests the consumption of the bath visitors also adds up to the income of the drink bar and the café.
- For conference food and beverage consumption the calculation was based on programs for an average of 100 persons.

For catering one can calculate with the assumption that most hotel guests will also dine at the hotel, and one can count on numerous a la carte guests from the apartments, the camping and the holiday homes of the resort, moreover, however, to a smaller extent on the transit tourists. Apart from these the restaurant utilization of conferences and business meetings play a significant part.

12.2.3. Wellness and sport income

This group includes the income from treatments (massage), the bath, and the bowling and squash courts.

For calculation the income of the bath the guests of the hotel were not taken into consideration, since they can use this service free of charge. The number of visitors to the bath will change from a yearly 80 000 persons to 90 000 persons until the end of the analysed period. 20% of the external guests come from the camping, who can get a reduced price ticket for 1250HUF. Other visitors have to pay 2080HUF for the ticket.

For calculation the income from massage the maximum capacity was taken into consideration, namely 30 persons per day. For the price of the service an average 3000 HUF was calculated with a yearly increase of 5%, by which the capacity utilization grows from 35% to 50%.

For calculation the utilization of sport grounds for bowling 2080 HUF per hour and for squash 3300 HUF per hour was calculated, the utilization of the courts was calculated for 10 hours/day for bowling and 8 hours/day for the squash court, for price increase a yearly 5% was calculated for them as well.

12.2.4. Leasing income

According to the calculations at the beginning the conference room can be leased 30 times and at the end of the examined period 40 times a year. The rent is 75 000HUF per occasion which increases yearly by 5%.

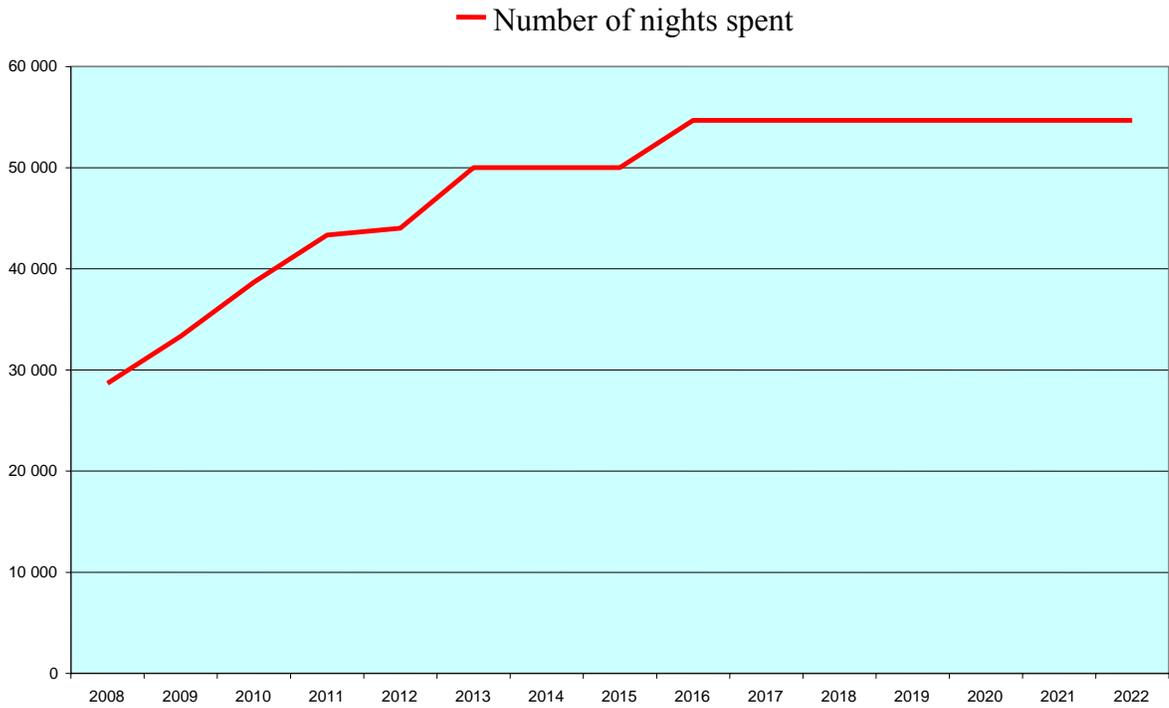
According to the calculations the 200 m² of the beauty site can be leased out for a price of 35 000HUF/ m².

The 50 m² of the shops can be leased out for a price of 30 000HUF/ m². Rents also increases yearly by 5%.

For the income of the hotel see Annex 1.

For the **income of the camping** the calculation was based on a maximum 190 parking places. The camping will be open all year, from April to October the capacity goes up from 25% to 50% in the examined period, while in the months between November and March it will increase from 8% to 12%. The number of nights spent, which will grow from 28658 in 2008 to 54677 in 2022, were calculated on the basis of these assumptions.

The following figure clearly shows this trend.



The income of the camping is made up of the site rent, the accommodation fees, and the price for the possibility to use electricity.

Apart from the above mentioned the camping gains significant income from leasing out a catering facility and a shop with a total area of 300 m².

For the income of the camping see Annex 6.

12.3. The estimation of operation costs

For the estimation of the operation costs of the hotel the data of facilities with similar service structure and similar standard were taken into consideration.

Experience was also taken into account when calculating operation appropriations, so in the first two years of operation the rationalization of cost utilization takes place, while in the third year it stabilizes. This explains the difference between the cost level of the first two years and the latter period.

12.3.1. Shareable costs

Hotel

This category covers the costs in connection with the occupancy of hotel rooms and their operation.

The most significant part is the salary and the parafiscal contributions of the employees working in the hotel front office and in housekeeping. The calculation of the salaries and other payments were made on the basis of 14 employees and a yearly gross average salary of 1.200.000HUF, taking into consideration other payments of personal nature and the obligated contributory system.

Owing to their value the cost of equipment and other expenses occurring was attributed less importance, this includes the costs of cleaning substances, the representation and decoration costs, transport, laundry and the costs of uniforms for the employees.

Catering

For catering apart from the salary and related payments a very important item of expenditure is the purchase price of food and beverages and the price of raw materials. On the basis of data from experience, the amount calculated for purchase prices as related to the turnover of catering, was determined for 24% for food and 15% for beverages. For catering the calculation was made in a similar way as for the hotel, with the salary of 19 kitchen employees, and in this case with a higher level utensil costs (eg.: cutlery) and other expenses.

Wellness and sports

The most significant cost of the unit is that of the salary and the parafiscal contributions of the 10 employees. The cost of operation in connection with the wellness services and the sport-grounds also forms a part of the expenditure items, together with other costs occurring.

12.3.2. Non-shareable costs

The non-shareable costs include the expenditure which cannot directly be assigned to any of the profit centres.

The management expenditure includes the costs of administration in connection with the management, the salaries of sales and human resources personnel, administration related costs, among others the amounts spent on stationary, and printed matter, as well as the postal, training and travel expenses.

The costs of the technical equipment and the energy contains the most significant item of the category (almost 75%) the costs of electricity and gas used, as well as the related expenses necessary to run the technical unit.

The salary expenses (advertising, commercials, propaganda) related to the sale of services were counted among the marketing costs, which in the first two years of operation are higher as a ratio of the revenue due to the intensity of the launching campaign than in the normal operation years.

The maintenance item includes the costs related permanent maintenance of the building and the reparations incurring. Since both the building and the equipment are newly purchased the maintenance expenses will not be high at the beginning, however, the value of the investment is far too significant to neglect the condition of the edifice.

Insurance costs are also part of this category, since the value of the property cannot be shuffled solely into the profit centres.

For the operational expenses of the hotel see Annex 2.

For the **estimation of the operation costs of the camping** the data of camping sites with similar service structure and similar standard were taken into consideration. On this basis the material and personnel type of expenditure was calculated as 20%, the other types of expenditures as 10% of the income.

For the survey of the operation expenses of the camping see Annex 7.

12.4. Return calculations

When examining the operation of the hotel and the camping the revenue and the expenses were compared.

The Gross Operating profit shows that operation will be profitable from the moment the investment comes into existence (see Annex 3 and 8).

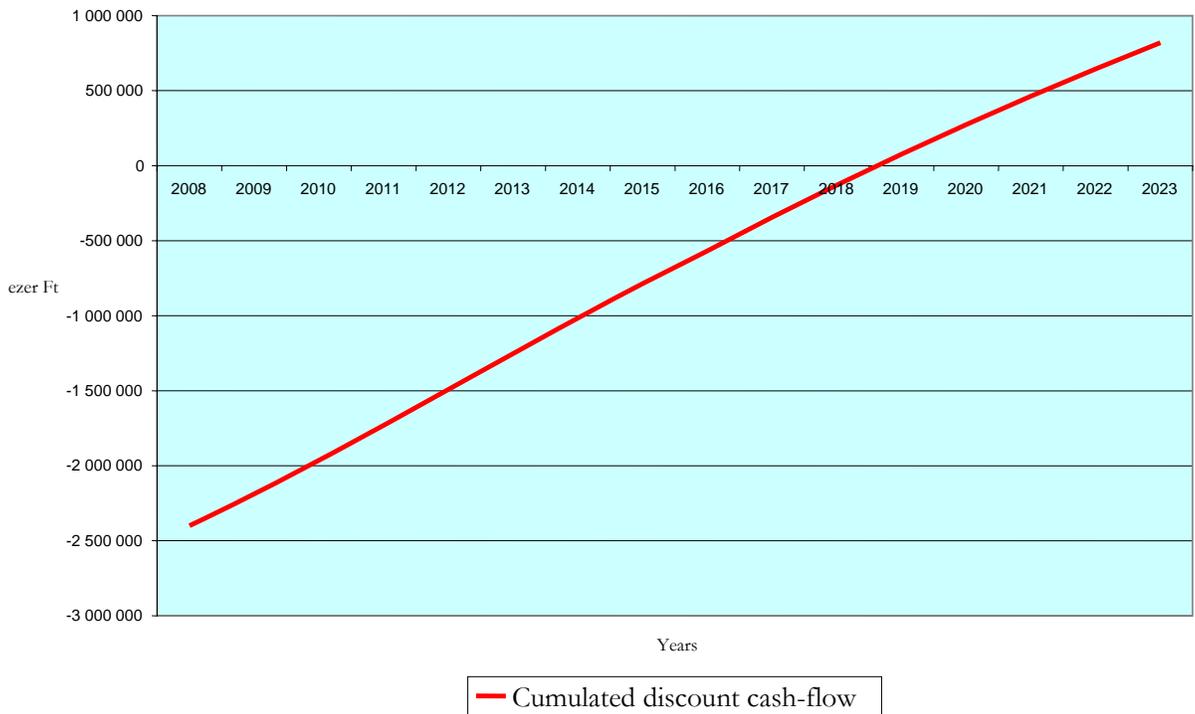
Efficiency was also examined from the point of view of cash flow; examining the joint effects of investment, operation and financing it can be seen that the investment is financially sustainable in the examined period. (See Annex 4 and 9)

When calculating the return of the investment, apart from the expected revenues the investment and operational costs were taken into consideration. For the discount rate the reference interest rate of 8.12% determined by the European Union was applied.

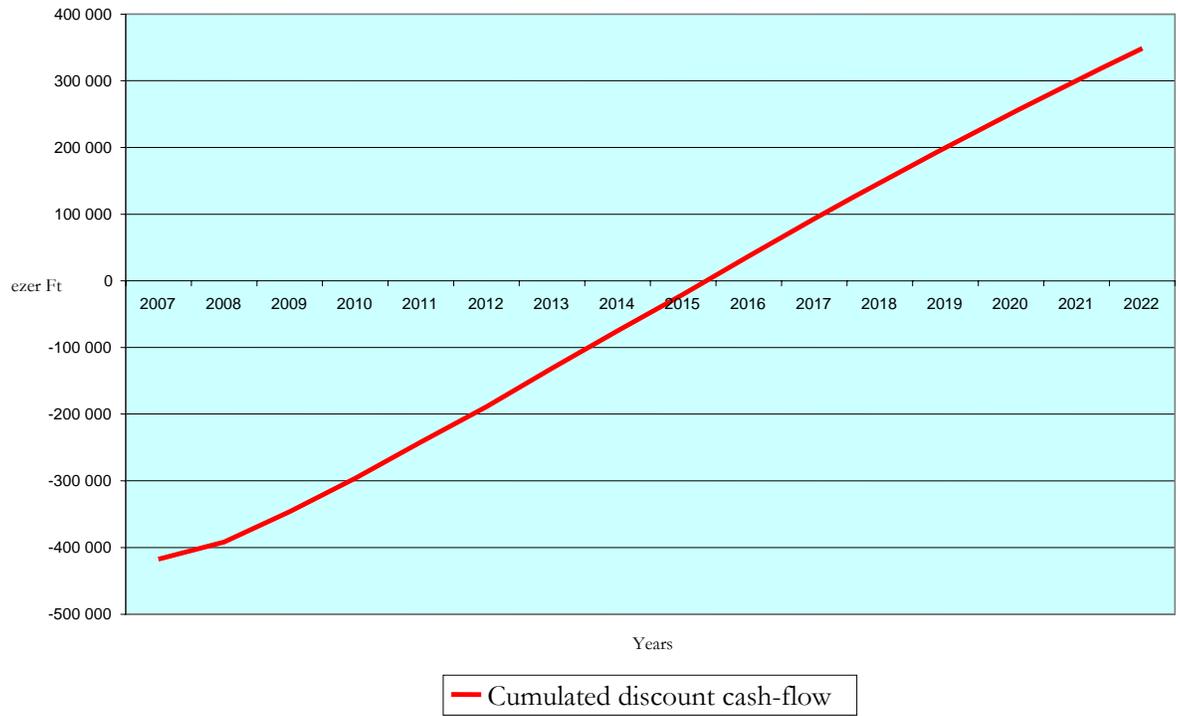
- For the hotel the internal rate of return was 4.09%. The investment will return in its 11th year in 2019.
- For the camping the internal rate of return was 8.34%. The investment will return in its 8th year in 2016.

For the discount rate the reference interest rate of 8.12% determined by the European Union was applied.

The cumulated discounted cash flow for the hotel is shown below.



The cumulated discounted cash flow for the camping is shown below.



For the survey of the return calculations Annex 5 applies to the hotel and annex 10 to the camping.

Ásványráró Üdülőkomplexum - SZÁLLODA - bevételeinek becslése (ezer Ft)

Title	Unit	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Number of rooms	Number	80	80	80	80	80	80	80	80	80	80	80	80	80	80	80
Number of apartments	Number	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15
Number of suits	Number	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
Opening period	Nights/year	365	365	365	365	365	365	365	365	365	365	365	365	365	365	365
Capacity utilization	%	40%	45%	50%	55%	55%	60%	60%	60%	65%	65%	65%	65%	65%	65%	65%
Number of rooms occupied	Rooms/year	11 680	13 140	14 600	16 060	16 060	17 520	17 520	17 520	18 980	18 980	18 980	18 980	18 980	18 980	18 980
Number of apartments occupied	Apartmens/year	2 190	2 464	2 738	3 011	3 011	3 285	3 285	3 285	3 559	3 559	3 559	3 559	3 559	3 559	3 559
Number of suites occupied	Suites/year	292	329	365	402	402	438	438	438	475	475	475	475	475	475	475
Number of tourist nights spent	Nights/year	31 478	35 412	39 347	43 282	43 282	47 216	47 216	47 216	51 151	51 151	51 151	51 151	51 151	51 151	51 151
Average room price	1000HUF/night/room	10,80	11,34	11,91	12,50	13,13	13,78	14,47	15,20	15,96	16,75	17,59	18,47	19,40	20,37	21,38
Average apartment price	1000HUF/night/apartmen	17,00	17,85	18,74	19,68	20,66	21,70	22,78	23,92	25,12	26,37	27,69	29,08	30,53	32,06	33,66
Average suite price	1000HUF/night/suite	32,00	33,60	35,28	37,04	38,90	40,84	42,88	45,03	47,28	49,64	52,12	54,73	57,47	60,34	63,36
Applied price index			1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05
Revenue per occupied room	1000HUF	172 718	204 023	238 027	274 921	288 667	330 655	347 188	364 547	414 673	435 406	457 177	480 035	504 037	529 239	555 701
Revenue from food	1000HUF	136 772	144 287	151 803	159 318	159 318	166 833	166 833	166 833	174 349	174 349	174 349	174 349	174 349	174 349	174 349
Revenue from beverages	1000HUF	27 354	28 857	30 361	31 864	31 864	33 367	33 367	33 367	34 870	34 870	34 870	34 870	34 870	34 870	34 870
Revenue of drink bar and café	1000HUF	23 869	25 253	26 837	28 420	28 420	29 804	29 804	29 804	30 788	30 788	30 788	30 788	30 788	30 788	30 788
Food and beverage consumption of conferences	1000HUF	9 000	10 500	10 500	12 000	12 000	12 000	12 000	12 000	12 000	12 000	12 000	12 000	12 000	12 000	12 000
Food and Beverage income	1000HUF	196 996	208 898	219 500	231 602	232 002	242 004	242 004	242 004	252 006	252 006	252 006	252 006	252 006	252 006	252 006
Income from massage	1000HUF	11 498	13 797	16 298	17 113	17 968	18 867	19 810	20 800	21 840	22 933	26 755	28 092	29 497	30 972	32 520
- maximum number of customers per day	persons/day	30	30	30	30	30	30	30	30	30	30	30	30	30	30	30
- capacity utilization	%	35%	40%	45%	45%	45%	45%	45%	45%	45%	45%	50%	50%	50%	50%	50%
- price of service	HUF/person	3 000	3 150	3 308	3 473	3 647	3 829	4 020	4 221	4 432	4 654	4 887	5 131	5 388	5 657	5 940
Applied price index			1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05
Income of spa	1000HUF	153 120	164 795	179 366	194 981	209 383	219 852	230 845	242 387	254 506	267 232	280 593	294 623	309 354	324 822	341 063
Number of guests	person/year	80 000	82 000	85 000	88 000	90 000	90 000	90 000	90 000	90 000	90 000	90 000	90 000	90 000	90 000	90 000
Guests from the camping	person/year	16 000	16 400	17 000	17 600	18 000	18 000	18 000	18 000	18 000	18 000	18 000	18 000	18 000	18 000	18 000
Other guests	person/year	64 000	65 600	68 000	70 400	72 000	72 000	72 000	72 000	72 000	72 000	72 000	72 000	72 000	72 000	72 000
Average price per camping guest	1000HUF	1,25	1,31	1,38	1,45	1,52	1,60	1,68	1,76	1,85	1,94	2,04	2,14	2,24	2,36	2,47
Average price per other guests	1000HUF	2,08	2,18	2,29	2,41	2,53	2,65	2,79	2,93	3,07	3,23	3,39	3,56	3,74	3,92	4,12
Applied price index			1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05
Income from bowling court		7 592	7 972	8 370	8 789	9 228	9 690	10 174	10 683	11 217	11 778	12 367	12 985	13 634	14 316	15 032
Average utilization	hours/day	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Price	1000HUF/hour	2,08	2,18	2,29	2,41	2,53	2,65	2,79	2,93	3,07	3,23	3,39	3,56	3,74	3,92	4,12
Applied price index			1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05
Income from squash court		9 636	10 118	10 624	11 155	11 713	12 298	12 913	13 559	14 237	14 949	15 696	16 481	17 305	18 170	19 079
Average utilization	hours/day	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8
Price	1000HUF/hour	3,30	3,47	3,64	3,82	4,01	4,21	4,42	4,64	4,88	5,12	5,38	5,64	5,93	6,22	6,53
Applied price index			1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05
Wellness and sport income	1000HUF	181 846	196 682	214 657	232 037	248 292	260 707	273 742	287 429	301 801	316 891	335 411	352 181	369 790	388 280	407 694
Conference room	occasions/year	30	35	35	40	40	40	40	40	40	40	40	40	40	40	40
Leasing fee	1000HUF/occasion	75	79	83	87	91	96	101	106	111	116	122	128	135	141	148
Applied price index			1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05
Surface area of beauty park	m ²	200	200	200	200	200	200	200	200	200	200	200	200	200	200	200
Leasing fee	1000HUF/m ² /year	35	37	39	41	43	45	47	49	52	54	57	60	63	66	69
Applied price index			1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05
Surface area of business premises	m ²	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50
Leasing fee	1000HUF/m ² /year	30	32	33	35	36	38	40	42	44	47	49	51	54	57	59
Applied price index			1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05
Leasing income	1000HUF	10 750	11 681	12 265	13 313	13 978	14 677	15 411	16 182	16 991	17 840	18 732	19 669	20 652	21 685	22 769
Overall income of hotel	1000HUF	562 310	621 284	684 450	751 873	782 940	848 043	878 345	910 162	985 470	1 022 143	1 063 326	1 103 891	1 146 486	1 191 210	1 238 170

Ásványráró Üdülőkomplexum - SZÁLLODA - bruttó üzemeltetési eredményének becslése (ezer Ft)

Title	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Revenue per occupied room	172 718	204 023	238 027	274 921	288 667	330 655	347 188	364 547	414 673	435 406	457 177	480 035	504 037	529 239	555 701
Food and Beverage income	196 996	208 898	219 500	231 602	232 002	242 004	242 004	242 004	252 006	252 006	252 006	252 006	252 006	252 006	252 006
Wellness and sport income	181 846	196 682	214 657	232 037	248 292	260 707	273 742	287 429	301 801	316 891	335 411	352 181	369 790	388 280	407 694
Leasing income	10 750	11 681	12 265	13 313	13 978	14 677	15 411	16 182	16 991	17 840	18 732	19 669	20 652	21 685	22 769
Total income	562 310	621 284	684 450	751 873	782 940	848 043	878 345	910 162	985 470	1 022 143	1 063 326	1 103 891	1 146 486	1 191 210	1 238 170
Shareable costs	201 507	213 428	240 202	254 402	264 774	279 001	289 729	300 994	317 087	329 578	343 095	356 886	371 367	386 572	402 537
Non-shareable costs	132 143	146 002	150 579	165 412	172 247	186 570	193 236	200 236	216 803	224 872	233 932	242 856	252 227	262 066	272 397
Total expenditure	333 650	359 429	390 781	419 814	437 020	465 571	482 965	501 230	533 890	554 449	577 026	599 742	623 594	648 638	674 935
Gross Operating Profit	228 660	261 855	293 669	332 059	345 919	382 472	395 380	408 932	451 580	467 694	486 299	504 149	522 892	542 571	563 235

Ásványráró Üdülőkompexum - SZÁLLODA - cash flow terve (ezer Ft)

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
1. Overall resources	2 400 000	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2. Overall income	0	562 310	621 284	684 450	751 873	782 940	848 043	878 345	910 162	985 470	1 022 143	1 063 326	1 103 891	1 146 486	1 191 210	1 238 170
I. Overall inward shift of money	2 400 000	562 310	621 284	684 450	751 873	782 940	848 043	878 345	910 162	985 470	1 022 143	1 063 326	1 103 891	1 146 486	1 191 210	1 238 170
1. Total operation costs	0	333 650	359 429	390 781	419 814	437 020	465 571	482 965	501 230	533 890	554 449	577 026	599 742	623 594	648 638	674 935
2. Total investment costs	2 400 000	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3. Interest rate	0	57 000	57 000	51 300	45 600	39 900	34 200	28 500	22 800	17 100	11 400	5 700	0	0	0	0
4. Instalments	0	0	114 000	114 000	114 000	114 000	114 000	114 000	114 000	114 000	114 000	114 000	0	0	0	0
II. Overall outward shift of money	2 400 000	390 650	530 429	556 081	579 414	590 920	613 771	636 865	649 430	676 390	691 249	708 126	725 142	743 294	648 638	674 935
Overall cash-flow	0	171 660	90 855	128 369	172 459	192 019	234 272	241 480	260 732	309 080	330 894	355 199	378 749	403 192	542 571	563 235
Overall cumulated cash-flow	0	171 660	262 515	390 883	563 342	755 361	989 634	1 231 114	1 491 846	1 800 926	2 131 820	2 487 019	2 865 769	3 268 960	3 811 532	4 374 767

6. sz. melléklet: A Red Gold kemping bevételeinek becslése (ezer Ft)

Title	Unit	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Number of camping site places	Number	190	190	190	190	190	190	190	190	190	190	190	190	190	190	190
Opening period	day/year	365	365	365	365	365	365	365	365	365	365	365	365	365	365	365
Capacity utilization	%															
Months: April, May, June, July, August, September, October	%	25%	30%	35%	40%	40%	45%	45%	45%	50%	50%	50%	50%	50%	50%	50%
Months: November, December, January, February, March	%	8%	8%	9%	9%	10%	12%	12%	12%	12%	12%	12%	12%	12%	12%	12%
Number of occupied places	place/year	12 460	14 493	16 813	18 846	19 133	21 740	21 740	21 740	23 773	23 773	23 773	23 773	23 773	23 773	23 773
Number of tourist nights spent	tourist nights/year	28 658	33 334	38 670	43 346	44 006	50 002	50 002	50 002	54 677	54 677	54 677	54 677	54 677	54 677	54 677
Price per camping place	1000HUF/nights spent/place	1,30	1,37	1,43	1,50	1,58	1,66	1,74	1,83	1,92	2,02	2,12	2,22	2,33	2,45	2,57
Accommodation																
Adult	1000HUF/night	0,90	0,95	0,99	1,04	1,09	1,15	1,21	1,27	1,33	1,40	1,47	1,54	1,62	1,70	1,78
Child	1000HUF/night	0,55	0,58	0,61	0,64	0,67	0,70	0,74	0,77	0,81	0,85	0,90	0,94	0,99	1,04	1,09
Possibility to use electricity	1000HUF/night	0,60	0,63	0,66	0,69	0,73	0,77	0,80	0,84	0,89	0,93	0,98	1,03	1,08	1,13	1,19
Applied price index			1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05
	1000HUF	46 713	57 052	69 493	81 791	87 188	104 020	109 221	114 682	131 677	138 261	145 174	152 433	160 054	168 057	176 460
Surface area of catering facility and shop	m ²	300	300	300	300	300	300	300	300	300	300	300	300	300	300	300
Leasing fee	1000HUF/m ² /year	30	32	33	35	36	38	40	42	44	47	49	51	54	57	59
Applied price index			1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05	1,05
Leasing income	1000HUF	9 000	9 450	9 923	10 419	10 940	11 487	12 061	12 664	13 297	13 962	14 660	15 393	16 163	16 971	17 819
Overall income of hotel	1000HUF	55 713	66 502	79 416	92 209	98 127	115 507	121 282	127 346	144 974	152 223	159 834	167 826	176 217	185 028	194 279

8. sz. melléklet: Red Gold kemping bruttó üzemeltetési eredményének becslése (ezer Ft)

Title	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Income from camping opearation	46 713	57 052	69 493	81 791	87 188	104 020	109 221	114 682	131 677	138 261	145 174	152 433	160 054	168 057	176 460
Leasing income	9 000	9 450	9 923	10 419	10 940	11 487	12 061	12 664	13 297	13 962	14 660	15 393	16 163	16 971	17 819
Total income	55 713	66 502	79 416	92 209	98 127	115 507	121 282	127 346	144 974	152 223	159 834	167 826	176 217	185 028	194 279
Total expenditure	27 857	13 300	15 883	18 442	19 625	23 101	24 256	25 469	28 995	30 445	31 967	33 565	35 243	37 006	38 856
Gross Operating Profit	27 857	53 201	63 532	73 768	78 502	92 405	97 026	101 877	115 979	121 778	127 867	134 261	140 974	148 022	155 423

9. sz. melléklet: Red Gold kemping cash flow terve (ezer Ft)

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
1. Overall resources	417 500	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2. Overall income	0	55 713	66 502	79 416	92 209	98 127	115 507	121 282	127 346	144 974	152 223	159 834	167 826	176 217	185 028	194 279
I. Overall inward shift of money	417 500	55 713	66 502	79 416	92 209	98 127	115 507	121 282	127 346	144 974	152 223	159 834	167 826	176 217	185 028	194 279
1. Total operation costs	0	27 857	13 300	15 883	18 442	19 625	23 101	24 256	25 469	28 995	30 445	31 967	33 565	35 243	37 006	38 856
2. Total investment costs	417 500	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3. Interest rate	0	8 775	8 775	7 898	7 020	6 143	5 265	4 388	3 510	2 633	1 755	878	0	0	0	0
4. Instalments	0	0	17 550	17 550	17 550	17 550	17 550	17 550	17 550	17 550	17 550	17 550	0	0	0	0
II. Overall outward shift of money	417 500	36 632	39 625	41 331	43 012	43 318	45 916	47 949	48 284	50 932	51 505	52 149	52 870	53 671	37 006	38 856
Overall cash-flow	0	19 082	26 876	38 085	49 198	54 809	69 590	73 333	79 062	94 042	100 718	107 685	114 956	122 546	148 022	155 423
Overall cumulated cash-flow	0	19 082	45 958	84 043	133 241	188 050	257 640	330 973	410 035	504 077	604 796	712 480	827 436	949 982	1 098 004	1 253 428

ANNEX 11.

13. INTERNATIONAL HEALTH TOURISM TRENDS

13.1. The situation of world tourism in 2005

According to the data of the World Tourism Organisation world tourism showed further increase in 2005 after the dynamic 10% growth of 2004; preliminary data show that in 2005 the number of tourist arrivals increased by 5.5%.

Despite the negative factors influencing world tourism – namely terrorist attacks, natural disasters, price stability, and economic and political conflicts – the number of tourist arrivals reached 808 million persons exceeding any other registered numbers. Compared to 2004 this means that an additional 42 million tourist arrivals. However every continent showed positive results, as far as circulation is concerned, the growth can mainly be attributed to Europe (+18 million tourist arrivals) and to the area of Asia and the Pacific (+11 million tourist arrivals). In Europe the number of tourist arrivals increased by 4.3%, which slightly lags behind the world average. The most dynamic growth of 7.1% was perceived in Northern-Europe, and the number of arrivals into the Southern Mediterranean countries increased by 6.2%. The arrivals into Central Eastern Europe including Hungary registered a 3.6% increase. The high oil and fuel prices, and the strong competition in air traffic did not influence the prices of airplane tickets. Events and programmes attracting a wider range of interest mainly had an influence at local level on a short term basis. Owing to the favourable offers of the low cost airlines and to the popularity of travelling leisure trips showed a more significant increase than business ones, similar to the previous years.

Forecasts:

According to the experts and to tourism organisations the trends of international tourism will change in the first decade of the third millennium. These days travel related to health tourism shows the most significant increase. In the future the expansion of the older generation guarantees further demand for health tourism, even though their income will decrease. Staying healthy, beauty and “maintaining” body and soul become more and more important motivations according to the needs of the younger generations. The age group of 16-35 will spend more and more on travel and will appear on the tourism market more frequently, however due to the decrease in spare-time the expansion of shorter trips can be expected.

The world wide net together with the new channels of information (digital TV) will push the traditional commercials into the background, but getting information will become simpler. Due to global warming the maintenance of natural resources becomes more expensive, and due to terrorist threats more money should be spent on the security of tourists.

13.2. The trend and description of health tourism

The increase of health tourism travels is also influenced by the fact that the main target group of health holidays, namely the generation above 50, whose aim is to stay healthy, feel better, is more and more willing to travel. At the same time the interest of younger generations is also turning towards health related travel, especially towards new forms of health tourism (wellness, fitness, beauty cures, etc).

The novelty of the so called Day-spa should also be mentioned, which is a wellness centre offering some hours of relaxation and pampering to the visitors.

Both in the United States and Canada one can observe a cooperation between wellness-centres and airports these days, these service providers offer services to the air travellers to reduce their discomfort caused by jet-lag and cramps because of long flights.

Going to a bath/spa is the most ancient method of tourism, the first memories of which come from the Bronze age. The spa sources, so called medicinal caves and the sludge containing mineral salts are also used these days to cure certain sicknesses, and during the last centuries a well developed tourism and medical infrastructure was built around the various natural sources.

The different countries and organisations use various definitions for defining spas/baths. Only the areas with natural mineral resources and the facilities of business groups offering such treatment are considered spas by the European Spa Association, while for the membership of British Spa Association the natural mineral resources can be substituted with other high quality bathing possibilities (good air quality, spectacular building, effective treatment).

According to the International Spa and Fitness Association (ISPA) “Spas are entities devoted to enhancing overall well-being through a variety of professional services that encourage the renewal of mind, body and spirit.” (<http://www.experienceispa.com/ISPA/About/Sustainability/>)

ISPA classifies the spas according to the following categories:

- Club spa - an entity with fitness as the main profile and which has several and from a professional point carefully composed services for everyday use.
- Day spa - services for everyday use.
- Destination spa - the main function is to enhance the lifestyle and cure using professional services, with a full selection of training programmes, full-board and accommodation.
- Medical spa - the main function is to provide services enhancing health and life quality with the help of professionals.
- Mineral spring spa - an entity which offers spa water or sea water at the natural site for the purpose of hydrotherapy treatment.
- Hotel spa - professional fitness and life quality enhancing services offered at a holiday resort or in a hotel.

The concept of spa is very complex it has a collective quality. It should be noted however, that due to its complexity it does not cover only the bath in the traditional meaning, but also facilities that offers almost any kind of services that relaxes, invigorates, cures and heals the guests and makes them feel healthier and more balanced.

Considering the equipment and the atmosphere there are various spas, their common ambition is to provide for an overall healthy state by satisfying physical, spiritual and emotional needs.

The “spa town” covers the overall concept of health tourism attraction, which is completed by the architectural heritage, the ambience, the environment and the variety of services offered for leisure purposes.

At the beginning of the 1990s with the expansion of healthy lifestyle new health tourism services appeared beside the health and spa tourism, which put the emphasis on health preservation instead of on traditional treatments. Among the new forms of health tourism wellness and fitness are the most commonly known concepts, the new type of cures contain also:

- Cures for spiritual renewal,
- Detoxifying cures and diets,
- Beauty cures, and
- Cures for relaxation and rest.

During the 1990s the new forms of health tourism became very popular in Western-Europe. Experts forecast a further increase in the popularity of other than traditional services for the beginning of the millennium. The importance of travel financed by social security decreases, people organise their own travel, which requires the development and marketing of individual program packages.

The traditional baths are aiming at making a distinction between their services and that of their new competitors, which have gained space in the last decade and their further development can also be expected. The new baths are not only popular among the consumers and doctors but also among the health insurance companies (especially among the private ones), who are urging their members to visit these new baths.

The reasons for using services abroad:

Most people pay for the health services in the own country, but at the same time look for services abroad as well.

The reasons for this could be as follows:

- the treatment is not available in the own country,
- better quality is attributed to the treatment in another country,
- the treatment is cheaper in another country,
- the favourable effect of environment change.

The society is continuously changing and the financial, social and life style trends arising from these changes have an unavoidable effect on tourism. It is very important that tourism sector recognises these changes in due time, so that it could react to the new demand or by outrunning the market creating demand.

The market is becoming more and more saturated, and this also applies to health tourism, so the profitability of tourism offers is defined by the more and more self conscious consumers, with more and more discretionary income and leisure time.

Demographic factors

The number of people belonging to the older generations is growing rapidly. The elderly people of the developed Western-societies are becoming healthier and will have a larger amount of income to spend at their disposal as they used to. Owing to these factors the number of experienced elderly travellers will increase more rapidly than the demand for tourism in general (however, at the same time the devaluation of pensions and the increase of pension age should also be taken into account, which might slow down these processes in the long run.)

From the point of view of utilization of health tourism services the demographic factors appear in the following manner:

- The demand for quality, comfort and security increases.
- The demand for comfortable transport facilities increases.
- The demand for facilities offering more peaceful relaxing possibilities increases.
- The demand for tailor made services increases.
- The demand increases in out of season months.
- Emphasis should rather be put on comfort than age in marketing.

The average headcount is decreasing further so the rate of leisure time and the income to be spent freely increases. This might have an effect on leisure travel for longer destinations or for short visits.

- The demand for luxury increases (“I also deserve a bit of pampering”).
- The demand for special tourism products bought on impulse increases.
- There will be greater demand for holidays which offer the “from winter to summer” concept.

Health consciousness

The health consciousness of people continues to strengthen, which might not influence the amount of demand, however has a role in the choice of destination and the behaviour during the trip.

The consequences of this phenomenon in tourism:

- The demand for vacation offering solely sunshine decreases.
- The popularity of active leisure and active tourism grows and the demand for facilities suitable for these purposes increases.
- There will be greater demand for wellness products, spas and fitness centres.
- The destinations which could be associated with unhealthy consequences will be avoided.

Travel experiences

The more experienced consumers will be able to define their needs more accurately and will also be better informed as far as their rights are concerned. This will result in more serious expectations concerning tourism with respect to price and value ratio.

The consequences of this phenomenon in tourism:

- The loyalty towards certain destinations decreases further, but at the same time the more experienced and more critical attitude will inspire the tourists to visit places they were satisfied with.
- The more experienced travellers became more and more critical as far as artificial offers are concerned and will favour authentic options, with special regard to emotional satisfaction and tailor made services.
- The destinations which cannot fulfil the expected standard will be and stay disadvantaged.
- The regions offering full, various and well balanced entertainment will become more and more popular.

The general characteristics of health tourism are as follows:

- the negative influence of seasonality has a lesser effect;
- longer than average period of stay;
- the average spending is 30-35% higher than at other areas of tourism;
- lessens the territorial concentration of tourism;
- it is a product based on confidence;
- marketing, segmentation and specialized services play an important role.

In the last decades two destinations of health tourism developed, health tourism on the one hand and wellness tourism on the other, which differ substantially in their trends, their services, as well as the type of guests they have.

The guests of health resorts became significantly older in the recent years, so the hotels were trying to target younger and well situated people with less medical like services (beauty farms, sport and fitness services) moving into the direction of wellness and health preservation. The offer of hotel services changes rapidly and many times it overruns the development of demand.

There are four factors which basically influence the demand in health tourism and which strongly influence the market growth, as well.

- strong confidence in the value of health services;
- traditions in the health services;
- the acceptance of health services by the medical profession;
- the willingness of state and private insurances to reimburse the health costs and if appropriate partially the costs of accommodation.

These indications of demand are only sufficient if not only a purely health infrastructure is created on the offer side, but also a more pleasant holiday resort like facility offering tourism, resting and relaxation and service packages, which are served by appropriate marketing communications means.

The trends of development of health tourism

The following tables show the trendsetting factors of various forms of health tourism :

Sports	
Activities	Positive/emphasized effects
Tennis, golf, swimming, horse riding, walking (power walking, Nordic walking), bicycle riding, aerobic, fitness	Health preservation (improves circulation and breathing) Experience, relaxation and social connections

For all generations, however, the choice of appropriate intensity is significant.

Massage and therapies	
Activities	Positive/emphasized effects
Ayurveda, Thai, Shiatsu, Watsu, Chinese massage, Lympho massage, Reflexology, Stress release, Fango treatment	Release cramps, flexibility, rest, enhancing mental state, detoxication, improving circulation

The massages and therapies are frequently offered under a special title, so the effect is connected to the trademark and later will easier be recognized and accepted.

Beauty treatments	
Activities	Positive/emphasized effects
Cosmetics, body treatment, aromatherapy, herbs, anti-aging techniques, manicure-pedicure	Wellbeing, stronger self confidence

Beauty treatment was long regarded as a female thing, but owing to the more and more masculine denominations (skin fitness and body fitness) men also look for these services.

Health treatment	
Activities	Positive/emphasized effects
Plastic surgery, gastroenterology, cardiology, life-style advice, state-evaluation, proactive behaviour	Wellbeing, stronger self confidence

The most important aspect of these treatments is how they are presented to the patients. The basic aim is to communicate the health value and importance of the treatment, while the patient forgets the fact that he/she is sick or feels sick.

The balneology treatments cover the combination of the above mentioned activities, which could be combined according to needs.

The characteristics of health and wellness tourists

Before elaborating on the characteristics of guest groups first one should have a look at what the following definitions really mean, namely how health tourism and its two branches health and wellness tourism can be defined¹.

Health tourism covers as a comprehensive concept all types of travel in connection with health. The main motivation of visitors is to improve the state of health, to heal (health tourism), to preserve and to prevent illnesses (wellness tourism).

Health tourism means making use of services available at places offering health services and health resorts, usually during a defined minimum period of time in order to heal, treat or cure existing illnesses under medical attention. The healing and tourism services based on natural healing factors (water, cave, microclimate, sludge) put the main emphasis on healing and the general tourism services and attractions only complement this aspect.

Wellness aims at creating a comprehensive approach (mental, physical and biological) of health, and is more connected to the change of lifestyle than with curing certain illnesses. The health conscious person contributes to the preservation of his/her health and the prevention of illnesses with a proper lifestyle, a healthy diet and with regular physical

¹ Source: Health tourism –MT Rt, Summary of background documents 2005.

exercises. Wellness tourism serves these targets with its complex services, which aim at the improvement of physical state and fitness, as well as preserving mental freshness. Wellness is a holistic approach and deals with human health in a comprehensive manner presupposing that the person involved actively takes part in the preservation of his/her health and the prevention of illnesses, and does not rely entirely on medication. This plays a significant role these days and can also be observed by the continuous increase in demand.

The characteristics of health tourism guests:

- they use services based on natural health factors;
- minimum stay (7-10 days);
- travel in order to cure specific illness, usually prescribed by a doctor;
- main emphasis is on getting cured;
- the tourism services have a complementary nature, pensioners, people coming from urban environment, at least intermediate level education, lower/average income.

The characteristics of wellness tourism guests:

- comprehensive health preservation, the need for mental, physical and biological harmony;
- voluntary participation in the programmes, the aim is less to cure a certain type of illness;
- middle aged/younger generations;
- higher level education;
- inhabitants of cities and better developed regions.

14. THE MAIN CHARACTERISTICS OF DOMESTIC TOURISM

14.1. The development of tourism in Hungary in 2005

Tourism is one of the most dynamic sectors of Hungarian economy as well. In 2005 the tourism of Hungary could register the best results of the past 15 years.

In 2005:

- the number of foreigners visiting the country grew by 6.9%, which accounted for 2.5 million extra visitors compared to 2004.
- compared to 2004 317 000 more guests spent 435 000 more nights at the commercial accommodations,
- the number of both domestic and foreign visitors grew steadily, and the country of origin also showed significant changes,
- the number of nights spent grew above country average in Budapest and the Budapest Middle-Danube region, while in the Lake Balaton area it showed no changes,

- the income of commercial accommodations grew high above the inflation rate and reached higher level than ever before.

In the first three quarters of the year the volume of international tourism income grew by 3.4%, while the tourism balance showed no changes.

14.2. Accommodation income in Hungary

In 2005 the income resulting from accommodation in commercial accommodations amounted to 112.3 billion HUF, which is a 13.2% increase compared to the same period of the year before. Two third of the accommodation income came from foreign tourists, the growth in this case was 7.8%, however it was by far exceeded by the growth of income from domestic tourism which was 25.7%. Apart from the accommodation income the commercial accommodations made an income of 53.6 billion HUF from catering and 45.5 billion HUF from other services. This way the commercial accommodations had an overall income of 214 billion HUF, which even at a nominal value means an increase of 12.6%, since the consumer price index of the sectors was 5.8%.

Within the commercial accommodations the highest income was made by hotels in 2005. 86.7% of accommodation income (97 billion), 81.5% of catering (43.7 billion) and 94,8% of the other type of income (46 billion) was realised in hotels. The most important regions as far as income is concerned were Budapest and the Budapest Middle-Danube region. 58.8% of the total accommodation income was realised in the Budapest Middle-Danube region, 14.1% at the Lake Balaton region and 7.8% in the Western-Transdanubian region. The distribution of the foreign accommodation income is characterised by high territorial concentration: more than three-quarters of the income was realized in the Budapest Middle-Danube region, a further 11.2% in the Lake Balaton area, and 5.9% in the Western-Transdanubian region. The income from domestic visitors were less concentrated than that of the foreigners', 28.8% was made in the Budapest Middle-Danube region, one fifth in the Lake Balaton area, 10% in the Western-Transdanubian region and Northern-Hungary.

The commercial accommodations are visited more or less by the same number of foreign and domestic guests. A very characteristic trend is the dynamic development of domestic tourism, and the decrease of Hungarian tourists going abroad, with the significance of domestic tourism increasing. In 2005 more than 36 million foreign tourists came to Hungary, which shows a growing trend.

According to the results of surveys the followings characterise foreign tourists:

- usually come alone,
- most of them are recurring visitors,
- most of the time they are satisfied with the information they get about Hungary, and also with the offers tourism has for them,
- satisfaction of visitors participating in health holidays is high,
- the main motivation factors: shopping, holiday, visiting relatives, business, spas, sports,

- spas are usually visited by the older generation, so a special attention can be given to them.

14.3. Characteristics of health tourism in Hungary

The future of domestic health tourism is mostly determined by the demographic, health and material situation of the society. Hungarian people usually spend 13% of their entire life sick. This also means that at the level of society the rate of the chronic sick is growing, and every fifth person is either sick or disabled. The health situation of the Hungarian population is remarkably worse than it could be justified by the socio-economic situation of the country. The most notable reasons for lagging behind are the unhealthy lifestyle of a large proportion of society and the structural problems of health service-providers.

The health awareness of society is low. Health hazardous patterns (drug use, smoking, alcohol abuse, etc) are rather common, and a dominant part of the country lives a life which is characterized by the lack of physical exercises; The healthcare advisory system which is already operational abroad does not exist, so there is mainly possibility to treat illnesses. Labour safety and healthy working environment would have a significant role in preserving the health of employers, but these questions are treated both by employers and by employees partly for material and partly for conceptional reasons as lesser significant.

The loss of health caused by lifestyle problems goes far beyond than the person affected, it is also a loss for economy causing production reduction and an increased expenditure in the public financed healthcare system. **Both the production reduction and the increased public spending lead to the loss of competition, and to the loss of GDP.**

According to the prediction for the future the population will be characterized by further decrease in number, aging, the increase of the elderly population and the drop of the younger. As for the forecasts the population of Hungary will be going down continuously, by 2021 it is expected to be 9.85 million. The number of younger people will decrease significantly, and as a new tendency the going down of the active population will also start. As a contrast, however, the number of the population over 60 will be significantly higher. Currently every fifth inhabitant is 60 or older in 2021 this rate will affect every fourth citizen.

Owing to the change in the level of education the perception of health - as value to preserve – its role and importance might also change, it might even increase.

The health situation of a country is affected by the health culture of the population, the historically established institutional system, the application of the latest scientific results, the economic situation and possibilities, which together with the political will might induce these necessary changes. The percentage of the population which has an income from work, has a significant impact on how the taxes, fees influence those resources which can be used for social benefits, pensions and healthcare. If employment increases

these resources increase as well, otherwise it decreases. Between 1980 and 2001 the number of people employed decreased by 1.4 million, at the same time the number of inactive earners, most of whom are pensioners grew. Between 1989 and 1990 the unemployed appeared, and as a result of these processes the “burdens” put on the employees within the working age population grew enormously.

The following tendencies can be expected in the Hungarian population until 2021

- The population decreases,
- The number of highly educated has grown in the recent years, which entails the need for preserving health;
- The number of marriages decreases, together with the importance of the family;
- Within the society the division of age-groups changes; the elderly will grow in number, at the same time the number of children and active wage earners decreases;
- As a result of the previous statement, a greater burden will be put on the active wage earners, so more attention should be paid to healthcare services;

The capacities of Hungary still permit significant development potentials. Hungary’s health baths and spas are also visited by foreigners, but for the domestic population health and spa-tourism is still at the beginning of popularity. In Hungary the increase of the standard of living and a change in the approach is necessary so that the population would be able to value the positive effects of health and spa tourism on the body, the mind and the soul.

In Hungary the traditional meaning of health and spa tourism gained a new significance and a new context in the second part of the 1990s.

Wellness is an active process of developing consciousness and changing the lifestyle which leads to health and personal wellbeing: not only already existing problems, curing and healing illnesses should be dealt with, but also foregoing illnesses, so the greatest emphasis should be put on prevention. The basic pillars of the wellness model are a healthy body, spiritual and psychic wellbeing and the balance with the social and natural environment.

From among the three subgroups of wellness (health, nature and water tourism) Hungary places a most great emphasis on the developing of health tourism, on the re-evaluation of health and spa tourism based on traditional treatment, and beside healing the significance of prevention is accentuated.

The characteristics of domestic health tourism

- **Owing to the recent development in the field of health and spa tourism the quality of services increased and the technological equipment evolved in Hungary;**

- The spa services are relatively low quality in certain places; the offer in additional and wellness services should be developed further;
- The price level of health and additional services is of medium or medium high level;
- The more services a spa can offer the higher its price becomes (a determining factor in the tourism offer of the settlement where the spa is situated and that of the region).
- For the use of spa and thermal water the baths have valuable infrastructural background, the value of which decreases due to the lack of development and modernization, so the health and technological level of spas is not adequate;
- Among the Hungarian population the most popular are the so called “complex baths” with an adventure park catering for the needs of various generations as well as the complexity of wellness services is available;
- Most baths work seasonally;
- Most domestic visitors visit the baths for relaxation and entertainment, while for foreigners healing as motivation is more dominant a purpose;
- Transportation facilities to the baths is many times inadequate, which however has improved since the development of the highway system and the airport started;
- There is a lack of persistent state participation in developing tourism;
- The services are not segmented, a new marketing approach is necessary;
- The participants of health tourism are characterized by a higher spending level, also at international level; Hungary’s spas are traditionally visited by - both considering domestic and foreign guests - the lower and the middle classes, so their spending level is not significantly high, however owing to the development of the recent years there has been a change not only in the number of visitors but also in the level of spending; Spas with additional adventure possibilities are visited by people with a higher than average income;
- Seasonality does not play an important role as far as health and thermal tourism are concerned; In Hungary this trend can also be observed for spas which also offer indoor services; From among the accommodations of spa resorts the capacity usage of health and wellness hotels is higher;
- Developments aiming at several generations get main priority;

14.4. The “holiday cheque”

In December 2005 1833 commercial and 1010 private accommodations accepted the holiday cheque as means of payment, so Hungarian tourists could altogether pay at 2800 places. In 2005 the places - together with travel agents, transport firms and cultural events - accepting the cheque exceeded 3000.

the value of holiday cheques exchanged at accommodations reached 7.2 billion HUF, 90% of which (6.5 billion HUF) was spent at commercial accommodations and the

remaining 676 million HUF at private accommodations by domestic tourists. One fifth (19.3%) of the accommodation income of the commercial accommodations came from the holiday cheques. Owing to the expansion of the exchange possibilities during 2005 holiday cheques of 8.5 billion HUF were exchanged at the places accepting them.

15. DEVELOPMENTS OF HEALTH TOURISM IN HUNGARY

The health tourism branch experienced significant developments during the recent years, partly owing to the role the state played (subsidies from the Széchenyi-terv) as well as to the more and more extended role the private sector decided to play in the field of health and wellness tourism investment plans. The development covered the whole of the country, however the most significant investments were and are (the finish of projects under construction) carried out in the Western-Transdanubian region, which traditionally possesses stronger position.

The following table summarizes the developments and their descriptions made in the field of health tourism in the framework of the Széchenyi-plan.

The territorial division of the projects subsidized by the Széchenyi-plan between 2000-2004.

Statistical region	Number of projects subsidized	Total of subsidies (million HUF)	Total of development (million HUF)
Budapest-Middle-Danube	10	4.408	11.767
Middle-Transdanubian region	8	2.698	7.408
Western-Transdnubian region	31	10.484	29.683
Southern-Transdanubian region	14	2.688	6.860
Northern-Transdanubian region	13	1.970	5.826
Northern part of the great plain	32	4.531	10.875
Southern part of the great plain	17	4.010	8.700
Total	125	30.789	81.119

Source: Hungarian Tourist Office

Owing to the subsidies the total amount of health tourism development exceeded 81.1 billion HUF (around 336 million Euros) between 2001 and 2004 in Hungary. From among the subsidized 125 investments 110 were directed at the development of spas and health institutes, and 15 at health tourism accommodations (health resorts). As a result of the investments made with the help of the subsidies between 2001-2004 the number of pools grew by 65% (from 363 to 598), and the yearly capacity of baths/spas by 85% (from 37.2 to 68.8 million persons).

16. REGIONAL PICTURE AND CONNECTIONS

16.1. The Western-Transdanubian region

The timing of the development ideas of the Regional Operative Programme 2007-2013 corresponds to the subsidy system of the European Union. 1100 billion HUF is expected to be available for the operative programme of the six statistical-planning regions of the country (the amount for the Western-Transdanubian region will be established later from the European Union resources).

As comprehensive target of the Regional Operative Programme the following aims are determined:

Consciously designed and implemented developments, the renewal of the knowledge based economy with the increase of the education level, high quality organisation of public service provision which increases the support of inhabitants, and the introduction of the natural resources and spiritual versatility of the region.

The specific aims are also built upon these aspects:

- development of an economy built upon innovation, and vivid local and international cooperation networks, the active and comprehensive expansion of the information society;
- capitalizing on the tourism potential of the cultural heritage based on high quality healthcare services and regional cooperation;
- the facilitation of the life of the people, families and communities living in the region, by developing the infrastructure and introducing environment friendly technologies; and
- the development of public services built upon local needs and facilities of the area, the renewal of the settlements/villages and the relationship between them;

A key element of the declared aim is development of economy. At the Western-Transdanubian region investment is inspired by the Ministry of Economy and Transport, however the region does not see a strong enough commitment from the central government to direct the flow of capital towards the region. This is why it is of extreme importance that the region would initiate the reinforcement of the institutional

conditions of investment-inspiration, and would base its international connection system on the Hungarian Investment and Trade Development Agency and on other international networks.

An essential element and one that goes far beyond investment-inspiration is the marketing campaign which communicates local values, uses local strongholds as basis, and reaches several target groups. It should cover both activities aiming at transfer of capital, and activities built upon natural, built or thematic programs. This latter however, should also aim at inhabitants of the country, not only at people from abroad.

One of the key conditions for the Western-Transdanubian region is to be able to keep up with competition is to create a favourable ambiance/environment for the attraction of multinational enterprises into the region, which would bring the development and service centres to the region.

The duration and the quality of the accessibility of the region is an essential ability to attract capital. The currently developing air traffic plays an increasing importance both regarding investors and tourism, as well as from the point of view of satisfaction and perception of the inhabitants. The network of regional airports can meet these demands.

One of the most important elements of competitiveness the quality and the quantity of the human resources are available in the region. Youngsters making a decision for further studies and thereby choosing their future profession rarely express a consciousness, there is a lack of conscious carrier planning. Regional features are still missing from the carrier choice. There is already a need that the young people with vocational secondary and higher education would have the qualifications required by economy, and if they plan their future in a certain region they should take into consideration the specific features of the region, so that their future employment would not be jeopardized.

The aim of the Western-Transdanubian region is to renew the Pannon heritage, to preserve and protect the characteristic natural, geographical and cultural heritages, and to develop in a cluster like cooperation in a new and unique manner. The health tourism and recreational developments based on thermal water resources are mentioned first in this context; as well the investments into rehabilitation services, the integrated development network of the coherent and complementary historical and cultural heritages; the support for thematic programmes of eco-tourism nature typical for the area, as well as services organised on the sub-regional level; and the renewal of the tourism institutional system of the region (the setting up of destination management organisations).

The background of the development-idea is supported by the spa water property of the region, which is significant both from the point of view of quality and quantity. Beside utilization of the spa/thermal waters rehabilitation and recreation services, wellness and fitness claim their part. However, an offer similar to that of the region's also exists in other parts of the country, therefore it is essential to create a unique image and offer of the thermal water based tourism service providers of the Western-Transdanubian region. Moreover the region lacks specialization; there are neither service varieties nor target

groups. A way to solve this problem could be by prioritizing health tourism, making direct connection between healing/curing and the utilization of thermal water, preventing illnesses, emphasized health awareness and the development of the service offers. From among the facilities providing renewal and reform the establishment of thematic parks and the emphasis on already existing development would support the unique image of the region.

The quality and standard of the healthcare services should be developed in the already existing spas and thermal baths which lack these facilities, as well as the further elaboration of the infrastructure in place using renewable energy sources (eg.: for the modernization of the heating system the use of solar energy or energy gained from waste calcinations, etc.) would contribute to the preservation of a healthier environment.

Currently the offer cannot follow the demand either regarding services or investments, so the idea of the expansion - opening - of the Pannon-thermal program into the direction of healthcare (treatment and prevention) was raised .

The aims of the programme the environment friendly use of spa and thermal water in the Western-Transdanubian region in order to expand the offer of regional tourism are the exploitation of the development possibilities within the unique health-balneological treasures in the field of health-tourism taking both rehabilitation and recreation into consideration by putting health consciousness and treatment in a priority position; the development of hospital treatment background of health tourism, and establishing health resorts; the establishment of cooperation between the healthcare, entrepreneurial and local governmental sector, and the support for common projects.

The following can be expected as consequences:

- the establishment of a high standard tourism offer under the close cooperation of healthcare and tourism players;
- the increase of establishment of jobs in the field of health tourism and services connected, with the creation of an up to date training system the quality improvement of tourism and healthcare services become obvious;
- as a result of the quality improvement the number of visits to the spas and the services required increases;
- the traffic infrastructure developments in the area (Sármellék airport, M7, M9 motorways etc) facilitate the accentuation of the already existing health tourism attractions and that of the ones to be developed with priority;
- the result of the cooperation possibilities opening up for the healthcare institutions is that by integrating already existing but frequently underused rehabilitation capacities they can increase their income and keep their employees
- the appearance of new business and market elements results in the establishment of new type of health tourism services, entailing latent effects in the healthcare services provided for the local population;

For quality development (linguistic and vocational etc.) it is essential to reform the training system which lacks both a vocational and a higher curriculum which is able to support health tourism services at a high level.

Beside the health tourism the region has good opportunities concerning the development of cultural and heritage tourism, as well, since considering its architectural heritage it possesses several attractions of international standard.

The basic idea for the creation of the Pannon Cultural Trips derives from the fact that the tourists coming in the winter season especially the ones participating in health tourism do not find accessible cultural events and the accessibility of other cultural attractions has also not been solved, as several musea stay closed after the main season is over.

The aim of the Pannon Cultural Trips is to create thematic trips with cultural and historical features, which apart from, but prioritizing the protection of the heritage, aim at creating a complex tourism offer in the Western-Transdanubian region, by connecting the single attractions into a heritage chain.

Eco-tourism includes the exploitation of natural, landscape and tourism possibilities especially by introducing the versatility of the landscape characteristic of the region, by dividing it up into so called "landscape unit packages". The land of the Szigetköz area, as well as the Hetés, the Rábaköz, the Őrség and the Little-Balaton show characteristic features, which offered to various target groups of tourists can reinforce the Western-Transdanubian regional aspects of active tourism as sub-regional programmes. Another imperative task is the qualitative development of the tourism accommodations, the accessibility of tourism attractions and the development of information and IT systems.

The territorial scattering and disparities of tourism services can be dealt with by destination management organisations, which by building upon already existing facilities (Regional Tourism Committees (RIB), and Regional Marketing Directorates (RMI), thermal-cluster, NGOs) efficiently facilitate the ever increasing advertising of the attractions of the Western-Transdanubian region by developing e-tourism portals and common booking systems.

16.2. County Győr Moson-Sopron

Development of tourism is included in the chapter about developing economy of the concept of development of Győr-Moson-Sopron county².

The general aims of the chapter on "Developing the innovation environment of the economic basis" are the following:

- Improving the competition and marketability of the businesses;

² <http://194.88.46.34/mtt/> <http://194.88.46.34/mtt/> (long term development concept of county Győr-Moson-Sopron and its territorial development program)

- Improving the integration of the businesses within the county and the region with the help of cluster based development;
- The expansion of R+D activities connected to the determining economic sectors of the county, the provision of innovative transfer services;
- The development of logistic centres and the expansion of the related services;
- Setting up local (sub-regional) employment cooperation (pacts) of obligatory nature;
- The **development** and the increase of the offer of accentuated tourism products, - **thermal and health tourism**, regions with significant natural and cultural heritage;
- The improvement of the operational capacity of the tourism institution system;
- The improvement of the conditions of agricultural production, inspiring structural changes and the strengthening of market accessibility;
- The development of agriculture and forestry built upon the sustainable utilization of natural resources, the creation of the conditions for organic farming and the facilitation of its expansion;
- The support for the development of micro-enterprises based on the sustainable utilization of mainly local resources in the sub-region;
- The development of village agro-tourism and management.

Three measures facilitate the realization of the priorities, which are connected at certain points but markedly differ from each other:

- The support for local economy development and for local innovations;
- The expansion of the offers of the small and medium sized enterprises, and expansion of the marketing methods/forms;
- The development of tourism, the expansion of tourism offers, village tourism and eco-tourism;
- Agricultural and rural development.

16.3. The Mosonmagyaróvár sub-region

In the chapter about tourism of the programme of the multi-targeted sub-regional association strategy of Mosonmagyaróvár the following development directions were expressed:

- The increase of the role of the tourism sector;
 - The development of the complex tourism offer of thermal tourism;
 - The qualitative and quantitative development of services, catering and trade;
 - The development of human resources in the sector, in order to increase professional level closer co-operation with the training institutions;

- Improvement of health services and healthcare background, the establishment of wellness services and their background infrastructure;
- Creation of complementary services and program packages for the different target groups.
- Development of eco-tourism
 - The development of horse tourism, creating the conditions for horse pensions, riding schools, horse trips (destinations, plans, tour guides, and complementary facilities) according to the requirements of the horse riders association;
 - In connection with biking tourism the construction of the missing bike paths within the region, the signatory system, expansion of services (rent a bike places, workshops, services, tour offers, accommodations) the creation of regional bike path connections (Lake Fertő, Lake Balaton);
 - Development of the so called “boot tourism”, which is based on natural treasures (walking paths, tour maps);
 - The improvement of the possibilities of fishing tourism, the creation of fishing lakes on the territory of former mine lakes and lakes;
 - Development of hunting tourism;
 - the expansion of facilities connected to water-tourism (small boat harbours, ferries), expansion of services, establishment of accommodations (camping sites, baths) and the development of their infrastructure;
 - The elaboration of a certification system for the various branches of eco-tourism.
- the development of sustainable tourism:
 - The improvement of the quality of accommodations;
 - The elaboration of complex village lifestyle suggestions;
 - The encouragement of village improving “beautifying” campaigns;
 - The development of gastronomy tourism based on local heritages;
 - The protection, development and the presentability of cultural heritages;
 - The renewal of the preservation of traditions;
 - Presentation of the craftsmanship, art folk and folkloristic crafts;
 - Organisation of regional/local festivals and fairs.
- The development of the tourism management organisations
 - The employment of professionals and utilizing the necessary infrastructure;
 - The determination of the uniform image of the region - common/general tourism image;
 - Market analysis, and strong marketing activity;
 - The creation of a nature park cooperation based on the equilibrium of tourism and nature;
 - Co-operation with the airports in Pér and Bratislava (Vienna) for a complex offer of the region;
 - Construction of a wide band internet system/network for facilitation market accessibility.

17. ACCOMMODATION OFFERS

17.1. The commercial accommodations offers in Hungary

In 2005 the number of registered commercial accommodations was 3600, that of the operational ones 3000. The commercial accommodations expected guests with 83 000 rooms and 320 000 places in 2005, the number of places increased in total by 1.5% compared to the previous years. The most significant increase could be observed in four star hotels, where the capacity grew by 13.8%. The number of places expected guests in hotels, within which the largest number of places (52 000) were in three star hotels. The other parts of the places were made up by camping sites with 28.8%, by inns with 14% and by hostels with 9%.

There were important developments and investments in the field of hotel room expansion in Hungary, and the number and capacity of health resorts and wellness hotels, as well as the services offered and their quality grew in a spectacular way.

In 2005 the Hungarian Central Statistical Office (KSH) registered 64 health resorts (59 operational) and 33 wellness hotels (31 operational). The Statistical Office has been collecting data about the health resorts since 1999 and about the wellness hotels since 2004.

The situation and the development of the number, room number and capacity of health resorts is shown in the table below:

	2001	2002	2003	2004	2005	Index 05/04 (%)
Number of health resorts	24	44	48	56	59	105,4
Number of rooms	3.828	5.455	5.819	6.774	6.822	100,7
Place (persons)	8.568	11.750	12.502	14.868	15.061	101,3

The share of health resorts continuously grew in the examined period. They made up only 3.3% of the hotels in Hungary in 2001, while in 2005 this rate reached 8.5%. The share of the number of rooms and places also doubled between 2001-2005.

17.2. Commercial accommodations offers in the Western-Transdanubian region

18.2% of the commercial accommodations capacity of the country can be found in the Western-Transdanubian region. As far as type of accommodation is concerned they have 17.9% of the hotel places and 20% of the capacity of inns and camping sites. In 2005 the commercial accommodations of Western-Transdanubian region had room for 60 000 persons.

17.3. The commercial accommodations offers in Ásványráró

The table below shows the number of places to offer by commercial accommodations in Ásványráró

Name	Number of rooms/persons
Szürke Gém Fogadó (Inn)	4/8
Öreg-Duna Csárda, Panzió (Pension)	9 rooms (2-3 beds) 24 persons
Szigetköz Fogadó (Inn)	4/10
Tündérrózsa Sátorozóhely (Tent place)	30 persons
Horgásztanya (farm)	34 persons
Popeye Camping	No data available

Source: Tourinform

The table shows that the village has no hotel only two inns, one pension and two camping sites, so there is room to accommodate around 100 persons per night.

18. DEMAND FOR ACCOMMODATION

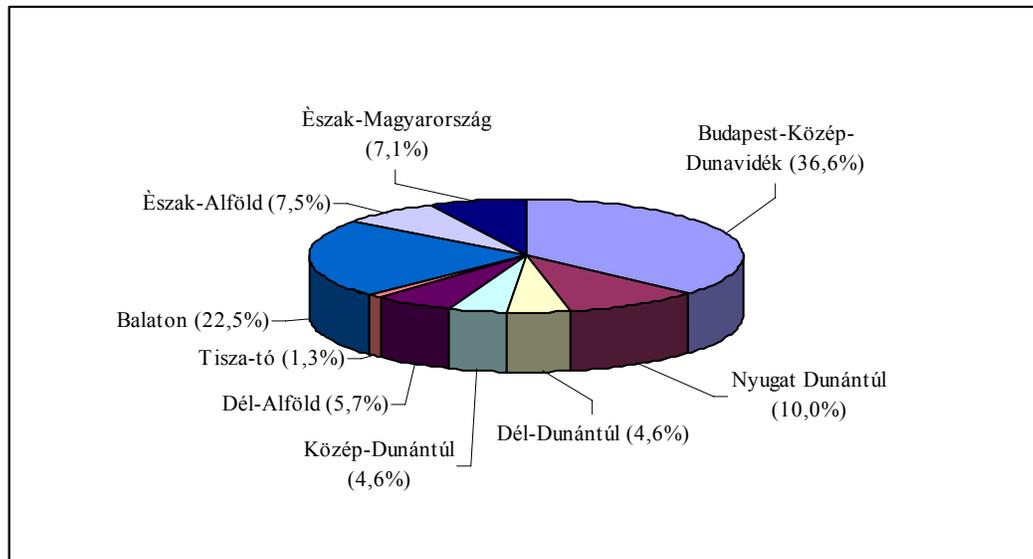
18.1. Foreign and domestic tourism in Hungary

In 2005 commercial accommodations has experienced the best results in the last 15 years, the numbers of nights spent has first exceeded by 335 thousand nights 19 million, the number of guests has increased by 4.8% and the number of nights by 2.3% compared to the previous year. In 9 months of last year the number of nights spent increased, however there was a slight decrease in the number of guests in April, June and August. The reason for the decrease in April is attributed to the fact that while in 2004 Easter was in April, in 2005 it was in March. In June and August the cold and rainy weather has influenced tourism in a disadvantageous way.

In 2005 the average time spent was 2.8 nights, with the foreign guests staying 3.1 nights, the domestic ones 2.5 nights at Hungarian commercial accommodations. Among commercial accommodations there are positive results for the passenger traffic of hotels (with more than two-third of the nights spent – 13.4 million nights), and especially among them for the higher category ones; beside the hotels with an average passenger traffic-growth of 6.4% (800 thousand extra nights compared to the previous year) the five star hotels have experienced a growth of 13.1%, the ones with four stars a growth of 12.9%. In the health resorts the nights spent have increased by 8.7% in the wellness

hotel with 65.7%. In 2005 from ten nights spent at commercial accommodations were registered in the Budapest-Middle-Danube area region. The Lake Balaton area - with 22.5% and the Western-Transdanubian area with 10% have also received a major share.

The distribution and change of the number of nights spent in the tourism-region (2005)



Source: Hungarian National Statistical office

18.2. The passenger traffic of foreigners at commercial accommodations

In 2005 3.4 foreign guests spent 10.6 million nights at commercial accommodations. Looking at 2005 as a whole, the increase of tourism which had started in 2003 kept on going further: the number of registered foreign guests increased by 4.3% at commercial accommodations, and the number of nights spent by them went up by 1.3% compared to the previous year. The proportion of foreigners regarding the number of guests almost reached 50% (lacking only 0.8%). However, owing to the longer period they stayed their share in the nights spent was higher, reaching 55.1%. In 2005 the number of nights spent showed the highest result in the last 15 years in 5 of the 12 most important countries of origin (Great-Britain, Japan, Rumania, Spain, and the United States of America).

From every ten nights the foreigners spend eight in hotels; the most guests went to four or three star hotels. In the hotels the number of nights spent by foreign guests increased by 3.5%, five star hotels had a growth of 11.5% four star hotels 7.9%, health resorts 5.7% and wellness-hotels experienced a remarkable growth of 18.8%. Beside the hotels the youth hotels also experienced an increase in the nights spent by more than 25%, and the inns exceeded the result of the previous year by 2.2%. Other type of commercial accommodations experienced a decrease of different levels (1.1-23.9%) because of the bad weather conditions of 2005. Looking closely at the regions, the regional concentration of tourism shows that almost 85% of the number of nights spent by

foreigners at commercial accommodations in 2005 were registered in the three most popular regions: at the Budapest-Middle-Danube region (54.2%), at Lake Balaton (22.1%) and at the Western-Transdanubian region (8.5%).

18.3. The passenger traffic of domestic tourists at commercial accommodations

The circulation of domestic tourists also showed increase in 2005, the number of guests growing by 5.3% and the number of nights spent by 3.5%. In 2005 3.5 million foreign guests spent 8.7 million nights at commercial accommodations in Hungary, which was the highest number in 15 years.

From every ten nights spent by domestic tourists 6 were registered in hotels. The steadily growing demand for higher quality services is clearly shown by the fact that the passenger traffic of higher quality places has increased beyond average. The nights spent by domestic tourists grew by 32.5% for five star hotels, for four star ones by 28.83% compared to the values registered in the same season in the previous year. In wellness hotels the nights spent has doubled, and health resorts have also registered a higher average increase (13.1%). In 2005 the nights spent by domestic tourists increased by 11.5% at a much higher rate than that of foreign tourists. The passenger traffic of other commercial accommodations shows a less advantageous picture, these establishments register a decrease of 16-17.2% of the nights spent by domestic tourists. As regards domestic tourism three regions can claim more than half of the nights spent by domestic tourists (Lake Balaton (23.1%) the Budapest-Middle-Danube region (15.00%), and Northern-Hungary (13.3%).

In health resorts the nights spent were registered as follows:

In 2005 the nights spent grew by 8.7% compared to the previous year, as for the nights spent by foreign tourists by 5.7%, and the nights spent by domestic tourists by 13.1%. A very important milestone was marked by the fact that in 2004 the requirement system for the category wellness hotel was defined. The number of wellness hotel together with their capacity shows a steady growth, and while in 2004 there were 20 registered institutions in the country in 2005 it went up to 31, and considering the number of places available the increase was almost 50%. The booking data of wellness hotels has so far only slightly exceeded the average booking of hotels.

In 2005 the number of guests also increased steadily, this increase amounted to 77.5%. The number of foreign tourists increased by 28.8%, the number of domestic tourists by 94.1%.

All in all it can be stated and also shown by statistical data, that the interest for accommodation offering wellness services has also grown among the Hungarian people. The number of nights spent in wellness hotels doubled in 2005 compared to the previous year, however it is important to note that most of this increase was registered at spa resorts. The growth in health resorts was a more moderate 13.2%. The services of

health resorts was used by 13.2% of domestic tourists, and in 2005 it amounted to 1 145 000 persons, and this tendency is expected to grow further.

The proportion of the nights spent by foreign tourists in health resorts was almost 15%, while in wellness hotels it was not more than 2%. So it can be observed that a more significant increase is shown in the interest in wellness services (18.8%), while in health resorts this increase amounted to 5.7%.

The number of nights spent according to type of accommodation

Type of accommodation	Number of nights (thousands)		Index 05/04 (%)	As a ratio of the nights spent altogether in 2005 (5)
	2004	2005		
Health resort national	1 011	1 143	113,1	13,2
Health resort international	1 486	1 570	105,7	14,7
Wellness-hotel national	241	480	199,0	5,5
Wellness-hotel international	172	204	118,8	1,9

Source: Central Office of Statistics, Hungarian Tourism ZRt.,

18.4. The utilization capacity of commercial accommodations

In 2005 the room-capacity utilization of commercial accommodations amounted to 39.5% and the hotels worked with a capacity of 48.2%. The capacity utilization of hotels increased parallel with the increase of the number of stars. From among the commercial accommodations the highest utilization was experienced in five star hotels 64.8% the lowest in hostels 17.3%.

The booking rate of health resorts exceeded the average booking of hotels:

	Average utilization of hotels	Utilization of health resorts
	(%)	
2001	46,6	63,4
2002	45,1	61,9
2003	43,7	57,4
2004	46,4	60,0
2005	48,2	61,3

2005. In health resorts the number of guests increased by 10.5% in 2005 compared to the previous year, which was the result of an 8.7% increase in the number of foreign and a 12.3% increase in the number of domestic guests. From 2001 on in the next 5 years the number of guests grew altogether by 91.7%, namely it went up from 377 thousand to 724 thousand. In 2001 the proportion of foreign tourists was two third, however as for now it has not only evened out but the proportion of domestic guests exceeds (52%) that of the foreign guests.

The average time spent in health resorts exceeded significantly (3.6 nights) the average of commercial accommodations (2.6 nights), the foreign guests spent 4.5, the domestic guests 2.8 nights in Hungarian health resorts. The passenger traffic of Hungarian health resorts showed the same changes between the period of January and June 2006. From among the commercial accommodations the most significant increase in circulation was shown by wellness hotels month by month.

18.5. Number of guests in the Western-Transdanubian region

In the Western-Transdanubian tourism region the registered number of guests at commercial accommodations grew from 679 000 to 721 000 between 2003-2005, which means an increase of 6.1-6.2%. , at the same time the number of nights went down from 1 951 000 to 1 934 000, which is a decrease of 0.8-0.9%. As a result of these two contradictory processes the average time spent also went down from 2.9 nights spent per person to 2.7 nights.

While from 2003 to 2004 this was the only other region beside the Budapest-Middle-Danube region which could show development as regards number of guests, and in the country it was on the second place - in the other tourism regions the number of guests decreased - from 2004 to 2005 the Western-Transdanubian tourism slid back to the fifth place considering the dynamics of development. As for the nights spent not only the slowing down of development should be mentioned, but also the fact that in 2005 the registered nights spent did in fact not reach the level of 2003.

In the demand in the Western-Transdanubian region there was no significant movement in 2005, the commercial accommodations registered a bit higher number of guests and a bit lower number of nights spent. It also shows that the average time spent went down by almost 4% following the international and domestic trends. (maximum experience - minimum time).

In the three counties of the region there is a significant difference as regards number of guests and average time spent at commercial accommodations. The numbers show the superior position of county Zala and Vas, and the regional average is pulled down by county Győr-Moson-Sopron. As for transit passenger traffic the proportion just on the contrary, county Győr-Moson-Sopron is the largest "transit" because of the main East to West and North to South tourism routes crossing. As far as country of origin is concerned there was no significant change, as the main input into the number of nights spent in the region comes from domestic, Austrian and German tourists amounting to

almost 90%. The proportion of German tourist was represented slightly lower that of Austrian tourists slightly higher as compared to 2004.

The most notable increase could be observed for the Rumanian, Polish, Spanish and English market, however none of them exceeds the proportion of 1.5% in the overall passenger traffic of the region. The trend of guests also adapted to the tendencies of the country, showing only minor differences. There is no significant passenger traffic of tourists from other countries. There is, however, a positive increase in the income form accommodation, which - apart from higher inflation rates - shows a greater demand for more expensive accommodation.

18.6. The guest data of county Győr-Moson-Sopron

In 2004 the commercial accommodations registered 397 000 guests showing an increase of 28 000 compared to the previous year, 43% of the guests came from abroad and there were 225 000 domestic guests. Within a year he number of foreign guests increased by 7.2% that of the domestic ones by 8.2%.

The proportion of guests from abroad reached 40%, topping in county Győr-Moson-Sopron with 44%. In the county the number of nights spent reached almost 900 000 at commercial accommodations, which was slightly lower that the year before, with the nights spent by guests from abroad growing by 1.1% while at the same time the number of nights spent by domestic guests went down by 3%. The average time spent was 2.3 nights.

From among the various types of accommodation 80% of the guests went to hotels and spent an average 4.2 days. More than 60% of the guests staying in hotels were domestic guests and their average time spent amounted to 3.0 nights, while that of the foreign guests reached 6.4 nights.

The guest data of county Győr-Moson-Sopron as regards country of origin								
Country of origin	Guests			Nights spent			Average time spent	
	Number	Rate	Change (2004/2005)	Number	Rate	Change (2004/2005)	Day(s)	Change (2004/2005)
Summary	396476	100	107,8	901044	100	98,7	2,3	91,5
Altogether Europe	166001	41,9	108,3	342006	38	103,1	2,1	95,2
Altogether EU countries	131807	33,2	104,4	287262	31,9	103,8	2,2	99,4
Asian countries	2101	0,5	73	3858	0,4	45	1,8	61,7
American countries	2236	0,6	77,7	4461	0,5	71,5	2	92,1
African countries	158		79,8	319		67	2	84
Australia and the Pacific	297	0,1	67,2	455	0,1	55,8	1,5	83
Altogether from abroad	171179	43,2	107,2	351739	39	101,1	2,1	94,3
Domestic altogether	225297	56,8	108,2	549305	61	97,2	2,4	89,8

Source: http://www.utazunk.hu/cgi-bin/turizmus/dokutar/dokulist_folap.cgi?parentid=13

In 2005 3 966 476 guests came to county Győr-Moson-Sopron. The majority of these tourists (56.8%) came from another region of the country, and a bit more than 40% came from another country of the world. From among the foreign guests 41.9% came from Europe within which 33.2 from the countries of the European Union. The most important country of origin is Germany, which contributed to the number of foreign guests with 15%. The second most dominant is Austria with 7.8%. Compared to 2004 the number of guests coming from Europe shows an increase of more than 8% in the following year. As for the number of nights spent the number is lower, while at the same time the guests coming from European countries spent more nights in the county compared to 2004. The tendency for nights spent is going down for the domestic tourists. As for time spent the highest amount (2.4 days) were reached by domestic tourists, but guests coming from any of the foreign countries spent less time in county Győr-Moson-Sopron than in the previous year.

18.7. The demand for accommodation in Ásványráró and in its neighbourhood

The following table shows the number of guests of commercial accommodations in Ásványráró and the neighbouring area for 2004 while data for 2005 is not available for Ásványráró.

	Guests			Change (2003/2005)		
	foreign	domestic	altogether	foreign	domestic	altogether
Hédervár	162	509	671	376,7	454,5	432,9
Lipót	1 481	7 487	8 968	154	1363,8	593,5
Mecsér	114	527	641	50,4	148,9	110,5
Ásványráró	16	16	32	10,7	10,7	10,7

Source: Tourinform

	Nights spent			Change (2003/2005)		
	foreign	domestic	altogether	foreign	mestic	altogether
Hédervár	211	657	868	277,6	266	268,7
Lipót	4 070	15 025	19 095	174,9	1334,4	553
Mecsér	292	1 253	1 545	55,3	85,9	77,8
Ásványráró	43	72	115	11,9	26,4	18,1

The data show that during 2004 around 600 persons came to each village spending 800-1500 nights in the Szigetköz area. Lipót could boast with as much as 9000 guests and the number of nights spent is above 19000, a major portion of the guests are domestic visitors. The tendency shows decrease, however one should call attention to the continuous growth of Lipót. After the opening of the extended spa in 2002 the number of guests (1300) of 2003 almost multiplied 10-fold by 2005 owing to the developments and the building of a four star hotel.

19. THE ATTRACTION OF MOSONMAGYARÓVÁR SUB-REGION

Village/settlement	The natural treasures and buildings	Cultural events
Bezenye	Peasant house Roman Catholic church with sculptures (VIIIth century)	Croatian ethnic days Day of the village Patron's day
Darnózseli	Forest of Zseli with ancient turf laned Linden-trees of the Millennium The chestnut-tree row on the Darnózseli-Lipót road Lake Mikota and its neighbourhoods French monument cemetery chapel Parish church St. John of Nepomouk chamber Olad peasant houses (XIXth ct.) on Fő utca (Main street) Jewish cemetery and the Holocaust memorial	Ocumenic praying week Remembrance to the soldiers lost in the battle at the river Don Day of Hungarian Culture Village celebration of March 15th (Hungarian revolution 1848) Folk dancers Easter sprinkling Planting a maypole (in the village) May 1st celebrations - day of the village Zseli Cup Drivers' ability contest Mothers' Day St. Florian Day Pentecost Children's Day Dancing out the maypole Sunday of the Heroes International Folks Dance Festival on Peter-Paul day St. Steven's Day Patron's Day October 23rd commemoration and handing over the Pro Urbe Awards (1956 revolution) Lighting the first Advent candle Shepherds' play Christmas at the music school John Day cup (indoor football)
Dunakiliti	Flood shore sub branch, water power station Castle of Dr. Batthányi Strattmann László Church	Day of the village Water festival Canoe marathon
Dunaremete	Danube Church	Day of the village Keeping traditions
Halászi	Peasant baroque houses Traditional Transdanubian agricultural town/settlement village structure Baroque church Walkway on the Danube front	Day of the village Horse riders' meeting Puppet festival Christmas concert

Hédervár	Árpád tree Kont tree Castle and castle park Blessed Virgin church Peregrinus chapel Potato-beetle statue	Timaffy days at the school Civic day on the playing-field Vigilante day/Militiamen day Day of the village Blessed Virgin days Horse riders' meeting Day of the fire-fighter association Lighting the candle at the Wooden tomb Saint Nicholas' day Day of the elderly
Jánossomorja	Roman Catholic churches (3) Ongoing local historical exhibition Statue of St. John of Nepomuk and Mary Hanság TK, Hanság main channel	Meeting of the wind instrument players Regional meeting of pensioners Youth meeting
Károlyháza	Hanság TK	Day of the village Children's Day Shepherds' play
Kimle	13th ct. Blessed Virgin church with original gate béletes 115 year old tree with Holy Trinity statue Riegler Tibor: King Béla IV's statue Horvátkimle (chestnut tree row with the stations of Jesus' suffering the trees were planted for the memory of soldiers from Kimle lost in the war) Mosoni-Danube Mine lakes	German day Croatian day Show of local cultural associations/groups May 1st celebration Dancing out the maypole Ethnic dancers meeting and show Day of associations Water carnival County meeting of German ethnic choirs Christmas eve
Kisbodak	Beauty of the natural environment Bench system of the Danube and the floodplain	Walk of the holy innocents Bethlehem
Lébény	Roman catholic church Former monastic quarters of the Paulians Lutheran church Saint Anne chapel Saint Florian statue St. John of Nepomuk statue Monument of WW I and II Roman milestone Village museum Wooden tomb Double cross of the millennium	Day of the village Day of the heroes Looking forward to Christmas Easter
Levél	Lutheran-Catholic church Prayer house of the Reformed	International Katika Festival Meetings/trysts

	Church Schwab row of houses Bust of Újhelyi Imre Monument of WW II Grave of Gulyás Lajos and plaque Fishing lake	Day of the village
Lipót	Saint Clement parish church (baroque) Environment protected study path with bird observatory Chestnut tree row Danube Spa/thermal bath	Day of the village Competition of poetry reciting of the village Meeting of choirs
Mecsér	Mosoni-Danube and neighbourhood Roman catholic church	Day of the village Sporting day Meeting of generations School and Kindergarten
Mosonmagyaróvár	Mosoni-Danube, River Leitha Wittmann park, Rudolf groove Lake Báger Town centre of Óvár Castle and its neighbourhood Local protected areas and buildings Riding school Italian chapel	Summer in Mosonmagyaróvári Meeting of the locals of the three borders Carnival Day of poetry Flesch violin competition
Mosonszentmiklós	Church with two chapels church place Maria statue “kuruc” monument	
Mosonszolnok	Church Sport centre Castle Statue of Lourdes	Day of the village “Katica” Festival Patron’s day
Püski	Church of historical value	Day of the village Vintage march Bethlehem Christmas devotion
Rajka	Church Holy trinity statue Holy family statue Anna-chapel Outside statue park Liszt Ferenc plaque, Old style ornamented houses Rákász-camping	Day of the village Patron’s day Folk dancers meeting
Újrónafő	Hanság TK Castles (2)	Day of the village
Várbalog	Environment protection area (annual pheasant’s eye)	Pentecost patron’s day Village day of Albertkázmérpuszta

