

Analysis of the Retail Trade and Catering Sector in the Largest Rural Resort Area of Hungary (Lake Balaton)

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Abstract: Lake Balaton is the biggest lake in Central Eastern Europe; it is surrounded by the largest Hungarian resort area: Lake Balaton Resort Area (LBRA). Due mainly to that fact, tourism in Hungary could be an important branch of the national economy. In order to sustain the advantages from tourism, conscious planning is necessary. The aim of the research is to investigate the peculiarities of the LBRA, Hungary's most important tourist destination. Furthermore, to examine the effects of the appearance of foreign interested merchant chains in the region and to analyze their effects on local investments from the 1990s. The effects of the changed commerce, seasonality and the composition of tourists on the catering sector are also analyzed. The characteristics of retail trade and catering enterprises are examined in detail through the weaknesses and opportunities in rural development.

The importance of the service sector in LBRA is extending, offering alternative workplaces for local inhabitants. This affects mainly employees from the primary sector, because they don't have any other work possibilities. Besides the classification of enterprises into branches, the concentration of retail trade and catering were also investigated. Additionally, a linear regression analysis was carried out between investments in the previous year and current turnover of retail trade enterprises in the region and a correlation analysis was done between the number of their employees and seasonality. We wanted to answer the question whether the priority of tourism would be enough in the future to the development of this special rural area, or diversification would be necessary for a sustainable development.

Key words: retail trade, catering sector, Lake Balaton Resort Area

The empirical research was conducted in the “Balaton Region”, including settlements from three counties. Associations of counties Somogy, Zala and Veszprém comprise the Lake Balaton Resort Area (LBRA). This resort area of 164 settlements has 25,000 enterprises. Based on Act CXII of 2000 (Country Planning Regulation of LBRA), the investigated area was divided into subregions and statistical microregions (SMRs). We defined 3 subregions, within these 7 SMRs. It was necessary to form subregions and SMRs, because the official statistical small regions do not cover the whole LBRA.

Based on the methodology of Babbie, the sampling was proportional between the settlements on the shore and those away from the shore (Babbie 2001). Also, town and village enterprises were investigated separately. 13 towns are located in the area, 10 of them are on the shore. The 151 smaller settlements differ from each other not only in their size, but also in their popularity and in size of their enterprises.

Influx of capital to hungary and to the Balaton area

Source: http://www.hff.hu/kutatas/btfkp2005_elemei/image002.jpg-2006.12.06.

“The agriculture of Hungary had been a successful branch of the national economy in the 1970's and 1980's, because its structure, including the co-operation of large farms and smallholders, was very effectively adapted to the technological conditions and market opportunities of the time. The measures introduced in the early nineties by the new government destroyed this structure. The arable land was split up and became the property of many owners, and this way a lot of new farms of very small size emerged. International supermarket chains also appeared on the Hungarian market. They are a new factor of agri-business earlier unknown in Hungary, causing a lot of fears and several problems” (Vízvári-Bacsi 2003).

Hungary was among the first former socialist countries to open its economy to foreign direct capital influx in 1989. This process was investigated by several authors¹. Radical transformation of the ownership structure commenced with the so called “spontaneous privatization”. In the first part of the 1990's - it was the first wave of investment - the main attractive force for investment was the cheap labour. At that time foreign capital could not be satisfactorily embedded into the Hungarian economy, the increase was generated by the separately operating multinational firms. Hungarian small and medium sized enterprises (SMEs) did not play a role as deliverers for the multis at that time. Also today multis invest mainly in Budapest and its vicinity (60 % of the capital stock is there). Some counties have got less than 1 % of the total capital stock in the country. Regional disparities are still growing. The relatively better developed infrastructure has attracted investments in the central and western regions. Cheaper manpower capacities of the underdeveloped regions may attract more labour-intensive technologies and production phases.

“The main development priorities of the Microregional Association are job creation, diversification of renewable energy use, improvement of the profitability of tourism, human resources development, rural development projects in the villages lying farther away from Lake Balaton” (Zemankovics-Mohácsi-Bacsi 2005).

¹ Following the political transformation of Hungary (1989), two excellent analysts (Losoncz 1991, Árva 1994) studied the extent and distribution of the incoming FDI (Foreign Direct Investment), and documented its comparative benefits. Hungary became the most popular country for capital investment following 1989 within the Middle-East-European Region. Csáki (1996) stressed the pressure of Hungarian national debt and mercantile based privatization as comparative benefits. The foreign investments eased the balance of payments and budget problems. According to Zemplerová (1997), because of its macroeconomic stability Bohemia did not need such urgent foreign capital as Hungary. This appeared also in the different FDI incentive policies of the two countries. As an effect of the capital influx, the market structure changed, which stimulated also the competition policy of the small and middle sized enterprises. In the first part of the political reconstruction, about 50 % of privatization incomes originated from selling of food industry companies (Kiss 1995). Boeckenhoff and Moeller (1993) systematized motivations of food industrial FDI influx based on eclectic grouping ideas. They demonstrated that the foreign capital targets first the concentrated branches. In the second half of the nineties the behaviour of multinational companies and their effect on the industrial production became stressed. Their accomplishments and financial indices are better than that of their home competitors, thus they contribute more and more to the continuously improving results of the sector (Szabó 2000).

Almost 60% of the foreign interested enterprises was concentrated in 8 cities and 2 villages in the region, while 80% of the capital investments was divided between 10 settlements (half of them villages). According to data from 1996, Keszthely was the first both in the number of organizations and in the amount of capital (KSH 1998). As regards the number of enterprises, cities on the shore were preferred by investors. LBRA shared 26% from the total investments directed to foreign trade in 2005, and most of them appeared in the settlements on the shore. The decrease can be explained on one hand by the saturation of the market, on the other hand by the structural problems of this coherent area with rural innovation abilities. The internal areal inequalities of the area are well known, the settlements on the shore being relatively more developed in terms of infrastructure, this being a main element for direct investments.

The biggest problem of the development of tourism at Lake Balaton is that the lake has no owner. With the exception of the Lake Balaton Development Council, there is no in-between institute among local and central governments which would ensure that the attention be given to the lake and the common goods necessary for the proper operation of stakeholders of tourism. It would be important to invest more into the development of infrastructure and road-network, to improve water quality, to work out a common marketing strategy, and it is necessary to emphasize the regionally integrated operation.

Peculiarities of the Investigated Area

Researches on tourism

The growth of mass tourism has lead to increased demand for research on this topic. Research has focused on two directions: the first one being the reasons and significance of tourism discussed from the viewpoint of the tourists, the second one the social and cultural effects of tourism (Sharpley 1994). In the field of anthropology, Nunetz and Duggan have dealt with changing processes between different cultures, while Pierce has focused on changes within the host communities, and all of them have dealt with cultures insulated by certain points of view (Nunetz 1989, Duggan 1997, Pearce 1982). Important research works were done on sociological issues, besides analyzing the systems of tourism, specifying characters of tourists, their motivations, attitudes, as well as on the social-cultural effects of tourism.

“Modern tourism came into existence in the Lake Balaton area hardly more than 200 years ago, parallel to the expansion of industrialization and urbanization. At the same time, possibilities of accommodation and catering became bigger, and also technical development had a good effect on the alteration of traffic” (Lengyel 1992, Sharpley 1994).

Tourism means free movement of persons to places outside their living or working places as well as all services connected with these (WTO 1989). This special system, which includes the tourist, who represents the demand, and the

tourism sector, offering the supply, is an open system, which is in interaction with the elements of social, cultural, political, economical, natural and technological circumstances (Lengyel 1992, Tasnádi 1998). After 1989, a radical change took place in the tourism in the Balaton area, causing a decrease mostly in the commercial and in social-purpose lodgings. The number of guests considerably diminished, because destinations earlier unattainable became available, the Balaton area after 1990 is no more the meeting point for the East- and West-Germans. The earlier demand market turned to be a supply market and the inhabitants recognised that development and changes are needed to keep their competitiveness also on the international market. In 1993, the Council of Balaton Region was established, which was succeeded in 1998 by the Balaton Regional and Tourism Committee. The Conception of Tourism Development has declared that in the area a conscious development and realization of an environment friendly conception is necessary, which will serve the long term development of the area and subsistence of the inhabitants (Lengyel 1995).

„The strengthening, respectively the establishment of the regional governmental level would be necessary to the success of Lake Balaton, because the environmental and economic problems of the lake could be solved only by such an institute which has enough sources and authority” (Csité et al 2006). The area has nearly 250,000 inhabitants, and due to seasonality most of the catering and retail trade enterprises are operating only from the end of April to the beginning of October, because further opening would not be profitable.

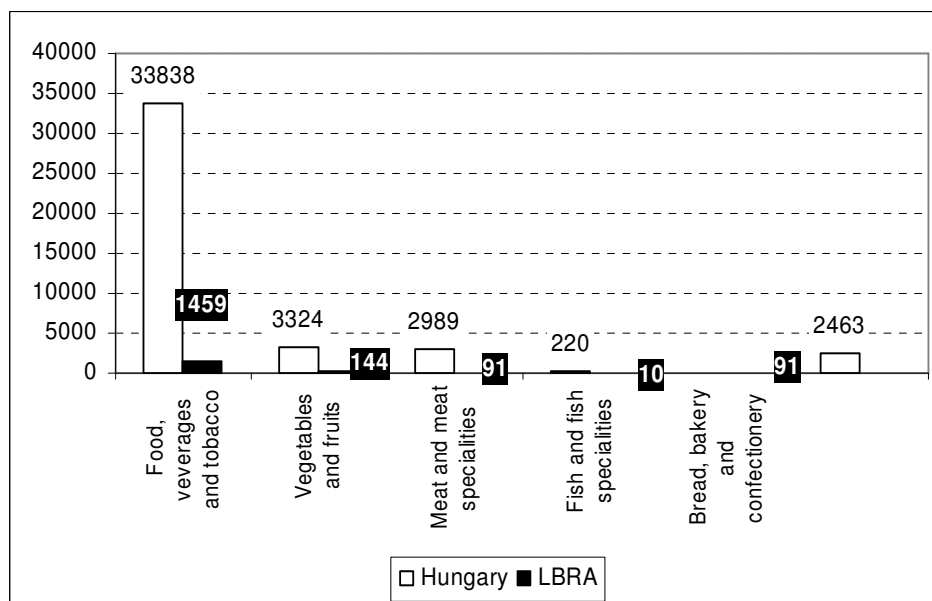
Trade concentration in LBRA

The high level of trade concentration is mentioned as a cause of the changes in the consumer customs, their moving to the more convenient shops. Apart from the factors of economies of scale, the growing capacity of big trade chains and the appearance of their own trade marks are more and more dominating. Increasingly fewer enterprises hold the steadily growing retail trade market. Most of retail trade enterprises have less than 50 employees, consequently mainly micro- and small enterprises dominate.

The LBRA includes 164 settlements covering the area of 3,780 km² in the counties Somogy, Veszprém and Zala, accounting for 4 % of Hungary's area (Figure 1). The special tourism possibilities have an effect on the structure of the local business sector. Mainly low capital-demanding tourism enterprises dominate here. Most of the enterprises show the highest value in the two most important branches of the national economy: in the trade and in the tourism sectors.

“In the LBRA there are 7,037 retail trade shops, including 1,459 food trade shops. The spread of hypermarkets and food discount warehouses worsened the positions of more shop categories. Despite this, those shops, which are easily accessible in the vicinity of residential areas, and those which are able to change easily their supply to the changing demands, have a reason for existence. The convenience and the high level of service in these shops is such an added value, for which a part of Hungarian consumers is ready and able to pay. Otherwise, many consumers still prefer suburb supermarkets with cheaper and bigger assortments of commodities for a weekend shopping” (Péter- Weisz 2005).

Fig. 2. The number of retail trade enterprises in 2005



Source: own table based on KSH data

The big sized trading chains (e.g. Lidl) with their supply of cheap products and depressed prices ruin the reputation of single vegetable and fruit traders. They dictate such a business policy, in which micro- and medium sized enterprises can only compete by clustering into cooperations. Those enterprises, which work only seasonally (e.g. in tourism) have been facing increasing difficulties. The structural change of retail trade can also be observed in the investigated region. The natural values of the area, like the thermal spas, the protected flora and fauna are excellent assets to be utilized via tourism. Tourism has a strong effect on the inhabitants' way of life. According to the 1996 data, enterprise density in the neighbourhood of the Lake surpassed that of the country. Within the area, mainly the settlements on the shore attracted the SMEs. After the political transformation, many family-sized enterprises were established, since families lost their jobs following the transformation of agricultural cooperatives in the smaller settlements. More and more so called „garage-shops” were opened with less than 50 m² selling surface for food and general store, hoping that this would ensure subsistence. (Kovács 2001) In 2000 there was a privatization wave in the investigated sector giving a new impulse to the retail trade. According to the latest data of 2005, there are 155,462 retail trade enterprises in Hungary. More than half of them are privately owned, as is the case with the investigated counties around the Lake Balaton.

According to the survey, medium size stores (which are not members of any merchant chains) have the least chance to survive in the competition against

shops with huge surface. Smaller shops specialized for local service, have better opportunities in small settlements and villages in the backwoods, because they play an important role in the distribution of daily consumer goods and because big chains of stores are not able to be present everywhere. This situation is observable to a greater extent in the background settlements of LBRA.

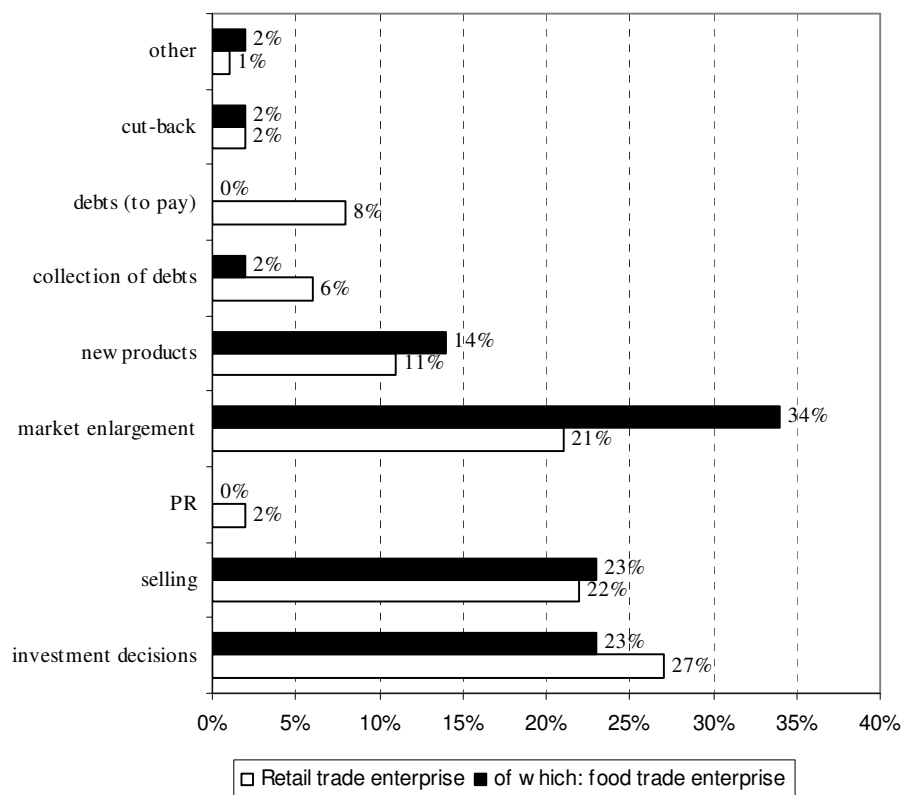
Characteristics of the analysed sample

Before 1990, the biggest part of trade was under state ownership. As a consequence of privatization and structural reorganization, a lot of people lost their jobs, and started their micro-enterprises based on tourism, important in the area. 68 % of 300 inquired entrepreneurs established their enterprises between 1991 and 1999. After 2000, the willingness to make an enterprise considerably decreased. This is due to new processes, the most important of them being the decreasing volume of tourism and the changing of social composition of guests. The appearance and activity of multinational and foreign interested companies heavily influenced the turnover and investment willingness of local micro- and small enterprises. According to the data of KSH, 66.5 % of the enterprises in the LBRA are under private ownership, the rest of them being joint enterprises (KSH 1998). According to the answers given to our questionnaires, more than two thirds of the entrepreneurs in the area are active as individual enterprises. 19 % of the firms are active as limited companies, and 6 % are joint stock companies, being mainly middle sized enterprises, considering their turnover and number of employees. Within the investigated enterprises, the ratio of food shops is high (39 %), followed by shops specialising in clothes with 16 %. Furthermore, candy and gift shops are linked to the tourist industry. The demands of the local inhabitants could be covered by one third of these shops. However, more shops are needed here, since the still growing thermal spa- and wellness tourism attracts guests and visitors throughout the year. The market share of bookshops, newspaper- and stationery shops is similar to that of household equipments and drugstores and of motor vehicle parts and accessories. The smallest ratio is that of parts and accessories since this is organised by the trade marks covering the whole country. Small is the trade of shoe and leather ware amounting only to 1 %, mainly as micro-enterprises in the LBRA. In the survey, we also investigated factors causing the greatest difficulties for the entrepreneurs, hindering their dynamic development (Figure 3).

The market enlargement was found to be the most difficult problem mentioned by the entrepreneurs (34-21%), which is strongly influenced by the fact that multinational firms and supermarkets often establish their own businesses in the area. Making investment decisions was also mentioned to be a problem (23-27 %), due to the uncertainty of the business environment. The introduction of a new product results in big expectations, since the entrepreneurs do not know yet, if there will be a demand for their product or not. 8 % of the entrepreneurs said that they have had to rely on credits for setting up their firms. Thus, beside covering the fixed and variable costs, they also have to cover their debts. As the food trade market is fully saturated, their biggest problem is market enlargement, and the increase of their market share. Multinational companies

appeared also in the investigated area considerably influencing food trade enterprises. Among the SMEs with foreign interest especially the Chinese were successful in the clothing trade, and, as a result, a number of local enterprises had to close because these Chinese businesses covered the whole market. Micro-sized and small shops are not competitive with the big firms since they cannot finance 24 hours opening time. They are at disadvantage since they cannot buy on a large scale, and therefore they have to sell for a higher price than their competitors. According to the opinions of 21 % of the questioned small enterprises, the Chinese shops make it impossible for them to run a clothing shop, even though goods sold in the Chinese shops are of poorer quality, a large proportion of consumers are unable to buy anything except these cheap products. As regards food trade, the situation is even worse (36 % gave a similar answer). Of course we have also received positive answers: 8 % of enterprises temporarily or permanently (4 % and 4 % respectively) deliver their goods to bigger enterprises.

Fig. 3. Problems in the decision-making of retail trade enterprises and food trade enterprises in LBRA, 2005



Catering in the LBRA

Fewer tourists came into the region because of the changes in holiday modes and increasing prices and this had an effect on entrepreneurial willingness as well. The characteristics of the area has changed a lot in the last decades. The initial prosperity of the food trade and in the tourism working mainly micro- and small enterprises shows cyclicity. Table 1 shows the areal distribution of catering enterprises in the Lake Balaton Resort Area. Most of the enterprises are located in the Keszthely-Zalaszentgrót Microregion, because the spa tourism in Hévíz lengthens the season for the whole year, and so the investing intentions are increased among small and medium sized enterprises.

Tab. 1. Distribution of catering enterprises in the LBRA (in 2005)

Statistical Microregions	Number of catering enterprises	Distribution of catering enterprises
Keszthely -Zalaszentgrót Microregion	708	19%
Marcali-Lengyeltóti-Nagykanizsa Microregion	192	5%
Fonyód Microregion	663	18%
Siófok-Tab Microregion	1014	27%
Tapolca Microregion	267	7%
Balatonalmádi Microregion	308	8%
Balatonfüred-Veszprém-Ajka Microregion	556	15%
Total number of catering enterprises in LBRA	3708	100%

Source: own table based on data from KSH

The examined entrepreneurs were asked whether the number of their employees changed in the summer months. Half of the questioned entrepreneurs employ occasional workers and the number of them slightly increases during the season. 36% of the sample said that this increase was significant, but these were mainly hotels providing not only only catering, but accommodation services as well.

Analysis of the relation between previous year's investments and current turnover with linear regression

Using a statistical model, we investigated the effects of investments made in the previous year on the turnover of 186 retail trade enterprises of various sizes. Sizes were determined by the number of employees. The hypothesis to be tested (H_0) was that a significant relationship exists between the investments and turnover of micro sized enterprises, the H_1 (alternative) hypothesis was that the previous year's investment has no effect on the turnover. The hypotheses were tested for the micro, small and medium sized enterprises (Table 2).

Tab. 2. Result table of linear regression

	Micro enterprises	Small sized enterprises	Medium sized enterprises
R (deviation)	0.348	0.396	0.126
R ² Square (Coefficient of Determination)	0.121	0.151	0.16
Constant /□ /	40195512	121768785	157604593
Unstandardized Coefficients /β/ for previous year's investment	8.133	-3.521	-1.398
Unstandardized Coefficients Standard Error of Constant	4978075.6	11615361	52719102
Unstandardized Coefficients Standard Error of the coefficient for previous year's investment	1.795	1.782	3.328
Standardized Coefficients /β/ for previous year's investment	0.348	-0.396	-0.126
Result of Student t-test for the constant	8.075	10.483	2.990
Result of Student t-test for the previous year's investment	4.530	-1.976	-0.420

The first row shows the deviations (R) from the square mean value, and this value is lower for medium sized enterprises than for the other two size categories. At this size-category in most cases the turnover surpasses 700,000 USD. The second row contains the determination coefficient (the variance), which shows the proportion of the R explained by the model. This value is in the range of 0 to 1. The low values for all the three size categories show that the model is not well fitted, as the acceptable value would be at least 0.3 – 0.4. This means that the previous year's investments explain only a small proportion of variance of turnover.

Using a simple linear regression our model is as follows:

$$y_i = \alpha + \beta x_i + u_i$$

y_i is the variable explained, in this case the turnover. α and β are parameters to be determined, where α is a constant coefficient, and β is the coefficient of the explaining variable, that is, the previous year's investment (x_i). The standard error of the β was tested using the *Student t*-test, to see whether the β value significantly differed from 0 or not. The u_i values indicate the error of the model.

Relationship for micro enterprises (values are in HUF):

$$\text{Turnover} = 40195512 + 8,133 * \text{previous year's investment} + 0,348$$

Relationship for small sized enterprises:

$$\text{Turnover} = 121768785 + (-3,521) * \text{previous year's investment} + (-0,396)$$

Relationship for medium sized enterprises

$$\text{Turnover} = 157604593 + (-1,398) * \text{previous year's investment} + (-0,126)$$

Tab. 3. Examination of significance in the case of turnover and investments

	Micro enterprises	Small sized enterprises	Medium sized enterprises
Significance for the case of constant	,000	,000	,012
Significance for the case of previous year's investment	,000	,061	,683

Table 3 shows the significance levels. Based on these we can accept our zero hypothesis only for micro enterprises, since a strong relationship exists between the investments and turnover: the significance level (the probability of error) is below 0.05. In the other two cases this explaining power of the model is weak, since a small or medium sized enterprise having been active for many years would not necessarily invest more for developments and renovations, but it may have a considerably high turnover. The next three figures (Figure 4,5 and 6) show the relationship of previous year's investments and current turnover, separated according to size categories.

Fig. 4. Turnover and previous year's investment of micro-sized retail trade enterprises in LBRA, 2005

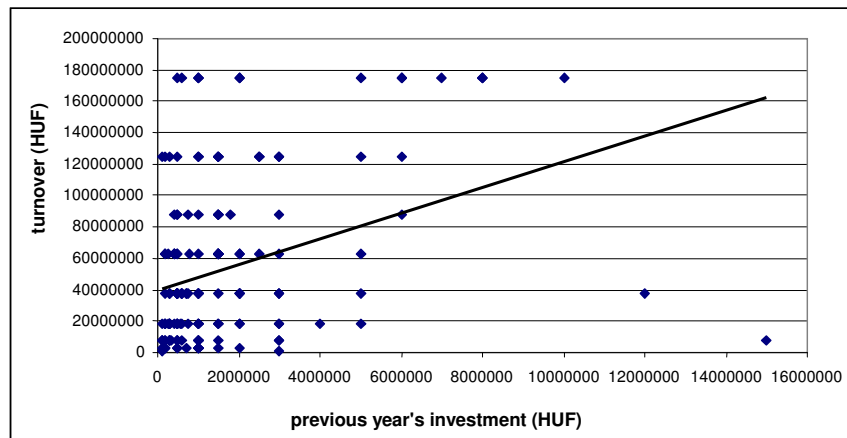


Fig. 5. Turnover and previous year's investment of small sized retail trade enterprises in LBRA, 2005

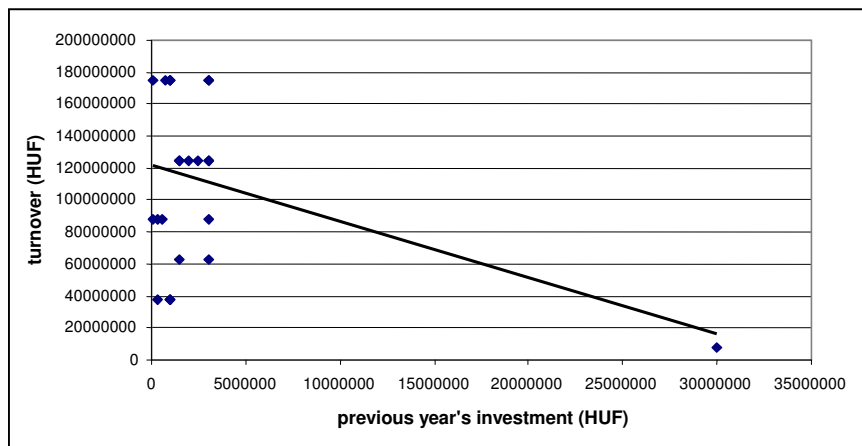
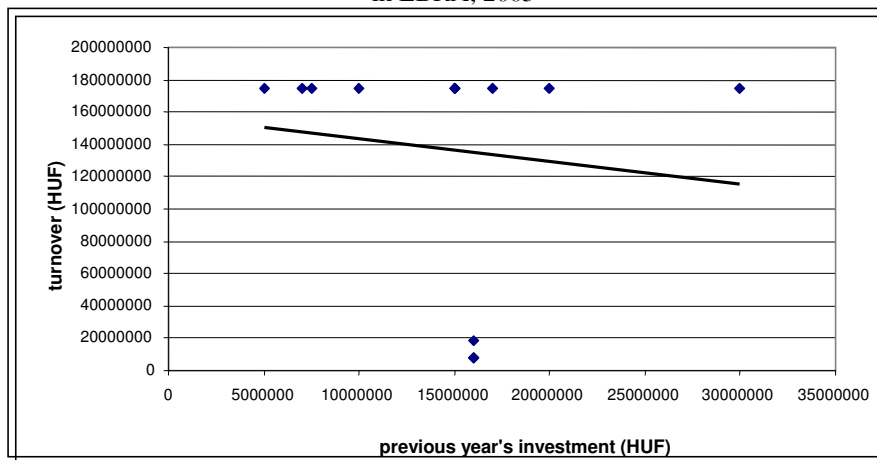


Fig. 6. Turnover and previous year's investment of medium sized retail trade enterprises in LBRA, 2005



Correlation analysis between the number of employees and seasonality

With the help of the examined sample, it was important to investigate the correlation between the number of employees and seasonality in the two branches of economy. The main season lasts from May to September in LBRA, at that time the enterprises have to serve more than 1,000 tourists than they used to in other months. The answers show that more occasional workers are employed in LBRA in the summer peak season than in the other part of the year.

Tab. 4. Results of correlation analysis

	Number of employees	Seasonality
Number of employees (Person correlation)	1,000	-0,341
Sig. (2-tailed)	-	,000
N	300	300
Seasonality (Person correlation)	-0,341	1000
Sig. (2-tailed)	,000	-
N	300	300

Table 4. shows the results of correlation analysis for the 300 examined enterprises. 79% of the enterprises was micro, 15% small, and 6% medium sized. The result was interesting; it shows a negative, moderate correlation. The explanation is that the bigger the enterprise is (in terms of the number of employees), the less the seasonality it affects. A bigger sized enterprise employs more people during the whole year, these enterprises build not only on tourism, but they are selling as deliverers out of the area too. Seasonality affects mainly micro enterprises, more than one third of them are closed during the winter months.

Conclusions

As shown in the present survey, small and medium sized enterprises must be handled with priority; they are able to lessen the negative seasonal effects by chain formation. The strengthening of "Balaton identity" is very important in terms of sustainable development. Trade and catering in LBRA is dually characterized concerning its ownership and structure. On the one side, there are high-capital multinational companies, who introduce new methods and who will make a strong competitive situation, on the other side, there is a huge number of small and medium sized enterprises with their unique professional inventions and adaptation capacities. We could not accept our zero hypothesis that there is a strong relationship between the previous year's investments and turnover. Although the significance level for the case of constant is below 0.05, there is no strong relationship between previous year's investment and turnover. The explaining power of the model is weak, since a small or medium sized enterprise having been active for many years would not necessarily invest more for developments and renovations, but it may have a considerably high turnover.

The result of the correlation analysis between the number of employees and seasonality was interesting; it showed a negative, moderate correlation. The explanation is that the bigger the enterprise is (in terms of the number of employees), the less the seasonality it affects. A bigger sized enterprise employs more people during the whole year, these enterprises build not only on tourism, but they are selling as deliverers out of the area too.

The cooperation of the regions and Lake Balaton Development Council, with professional regional development policy is necessary to establish common aims. Hopefully this will be emphasized in the programming period 2007-2013 as

well. Cooperation, programming and monitoring with central, regional and European stakeholders are also very important because of the influx of active capital. The retaining power of the resort area shouldn't be based only on tourism, openness for further branches is necessary to keep youth in the area. Above commerce; education, research and development and thermal tourism can be a solution for seasonal employment. Producers, agricultural and food industrial companies should meet with more and more concentrated and strong partners who force them to compete and speed up their development. It is a potential solution for small scale producers and micro enterprises to become deliverers for bigger companies. This ensures not only their existence, but development as well.

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ANALIZA TRGOVINE NA MALO I UGOSTITELJSKOG SEKTORA U NAJVEĆEM RURALNOM TURISTIČKO- ODMARALIŠNOM REGIONU MAĐARSKE OKO JEZERA BALATON

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Rezime

Jezero Balaton je najveće jezero u centralno-istočnoj Evropi, okruženo najvećim odmarališnim turističkim regionom u Mađarskoj – odmarališnim regionom jezera Balaton. Zahvaljujući prvenstveno ovoj činjenici, turizam u Mađarskoj bi mogao da postane važna grana nacionalne ekonomije. Neophodno je izvršiti svesno planiranje radi održivog iskorišćavanja pogodnosti turizma. Cilj ovog istraživanja je ispitivanje osobenosti odmarališnog regiona jezera Balaton, najznačajnije turističke destinacije u Mađarskoj, uticaja pojave inostranih trgovinskih lanaca zainteresovanih za ovaj region i njihovog uticaja na lokalne investicije od 1990. godine. U radu se, takodje, vrši analiza uticaja izmenjene trgovine, sezonskih varijacija i sastava turista na ugostiteljski sektor. Vrš se detaljna analiza karakteristika preduzeća koja se bave trgovinom na malo i ugostiteljstvom sagledavanjem nedostataka i povoljnih mogućnosti ruralnog razvoja.

Sve je veći značaj uslužnog sektora u turističko-odmarališnom regionu jezera Balaton, koji obezbeđuje alternativna radna mesta za lokalno stanovništvo. Ovo ima uticaja uglavnom na zaposlene u primarnom sektoru, pošto oni nemaju nikakve druge mogućnosti za zapošljavanje. Osim podele preduzeća na grane, izvršena je i analiza koncentracije trgovine na malo i ugostiteljskog sektora. Pored toga, izvršena je linearna regresiona analiza investicija u prethodnoj godini i trenutnog obrta preduzeća koja se bave trgovinom na malo u regionu, kao i korelaciona analiza broja zaposlenih i sezonskih varijacija. Autori su želeli da odgovore na pitanje da li bi turizam kao prioritet u budućnosti bio dovoljan za razvoj pomenute ruralne oblasti ili bi morala da se izvrši diversifikacija u cilju održivog razvoja.