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**COMPETITIVENESS ANALYSIS OF FILM TOURISM IN
BUDAPEST: INVESTIGATION OF ATTRACTIONS AND
OPPORTUNITIES**

Theses for doctoral thesis (PhD)

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Table of contents

1. JUSTIFICATION OF TOPIC CHOICE	4
2. MAIN AIMS AND QUESTIONS OF THE RESEARCH.....	5
3. CONCLUSIONS AND PROPOSALS.....	8
3.1 The most important findings and results of the research.....	8
3.2 New and novel results of the research.....	11
4. SUMMARY AND POSSIBILITIES FOR FURTHER RESEARCH	20
5. BIBLIOGRAPHY	23
6. RELEVANT PUBLICATIONS	24

1. JUSTIFICATION OF TOPIC CHOICE

My choice of topic was basically motivated by one main direction, namely the threading together of my previous studies and the unification of the different scientific fields connected to it. One of the most interesting common areas of cultural organization and tourism is none other than film tourism. Film tourism is playing an increasingly important role in cultural tourism, and moving images and digital tools are gaining ground especially in the field of destination selection. The characters or locations in the works are capable of evoking a strong emotional attachment, which is why the involvement of tourism puts the role and effect mechanism of films in a completely different aspect. In this connection, an integral part of my research is the examination of the cognitive map, which broadens the spectrum of the analysis with the help of the selected films.

The dissertation focuses on our capital, Budapest, as in the past decades the Hungarian capital has been featured in many Hollywood films - unfortunately, mostly not as Budapest. Cultural and creative industries play a central role in increasing competitiveness, inducing benefits that are difficult to match in other areas. The segment clearly includes those activities that are based on creative abilities and skills and have both an economic and cultural impact. The best example of this is the world of film, as it can be defined both as a cinematic art and as a film industry, depending on whether you approach it from the creative or the business aspect. This is why it is also worth looking at local specificities and uniqueness.

In relation to competitiveness, the paper not only aims to present the interpretative possibilities used in tourism, but also to discuss the destination competitiveness models used in the segment and

their possible transfer from the perspective of film tourism. The performance of the film sector in our country has increased almost twentyfold since 2004, with a quantifiable tax revenue-generating and GDP-increasing impact. It is therefore essential to examine the Hungarian film industry in the light of the changing economic environment, changes in the performance of the film sector, and the impact of legislation and legislative changes. The boom in the film industry itself is clearly attracting the growth of related economic sectors. This thesis is also one of the foundations of the research, as the study (also) tries to identify the focal points that make Budapest a prominent player on the European film tourism map. However, for this, it is essential to take into account the locations that can be associated with Budapest on the film screen, the actors of the supply side of film tourism, as well as the film tourism products of the city. The aim of the study is to investigate the influence of the film on our motivation to travel and how we imagine a given destination after watching the film.

Another important aspect is, whether a film is able to achieve such an impact that the viewer visits the given area as a future tourist. A further aim is to identify the factors, that enrich the supply and demand side of Budapest in the field of film tourism, and what further steps could be taken to promote competitive film tourism in our country.

2. MAIN AIMS AND QUESTIONS OF THE RESEARCH

Based on the above, **four basic research objectives** and five research questions and five hypotheses can be formulated.

The main objectives of the research are: 1) to define the role of film tourism in the creative economy and tourism, with emphasis on the European continent, 2) to develop a competitiveness model

that fits the film segment and includes the specificities of the sector, 3) to investigate the demand and supply side of film tourism in Budapest, 4) to explore the process of cognitive mapping of film tourism sites.

Once the objectives had been established, the basic research questions were drawn up and addressed in detail in the study.

Question 1: How can film tourism be defined, what methodologies and criteria have been used by researchers in the past to approach the topic?

The first research question can be related to the definition of film tourism itself, as the sector is becoming more and more popular every year, and researchers are analysing the field from a wide range of perspectives. The international literature covers an increasingly wide area, but domestic researchers are not included in large numbers in this topic. All of these are complemented by the areas of the European continent that are highlighted from a cinematic point of view.

Question 2: Which destinations can be called prominent film tourism locations?

H1: Those film tourism destinations operate successfully, where the presence of market players is balanced, there is a management organization coordinating special products and, in addition to all this, well-identifiable, iconic locations appear in the film serving as a basis for motivation.

Along the lines of the second question, the investigation aims to identify the areas where the national film industry already enjoys a long tradition and, thanks to this, also film tourism. The focal points, from which good practice and efficiently functioning market mechanisms could be adopted will be explored.

Question 3: What competitiveness models can be used in the field of tourism and which model can be adapted in the case of film tourism?

H2: Using competitiveness models already used in tourism research, a model suitable for film tourism studies focusing on competitiveness can be adapted.

The third research question focuses on competitiveness; especially the competitiveness models used in tourism are highlighted, in addition to the conceptual definitions of competitiveness. The research question sheds light on how a film tourism competitiveness model can be built that is properly applicable and can also be used in practice.

Question 4: How does film tourism appear in the capital, what elements of demand and supply are found in Budapest?

H3: The capital city has a significant international film tourism offer, but the demand for film tourism is not yet significant.

The fourth research question focuses on Budapest and formulates a complex tourism analysis, in which both the supply and demand sides appear in the context of the Hungarian capital and the film tourism elements located there. An additional point of view is proposed here, which focuses on the changes that have taken place in the country in the light of the film industry and the economic and legal regulations.

Question 5: How are film tourism destinations perceived by travellers, how distorted is the link between reality and the film location, and does the film image influence travel decisions?

H4: The destination, which is often used as a dummy location in films, can make the viewer confused about the identification of

the real space, which can have a negative impact on travel decisions.

H4.a: The ability to identify film tourism destinations in real space based on films is closely related to educational attainment.

The fifth research question focuses on the tourist, using cognitive mapping. The study looks for answers to how a particular film tourism destination appears to the traveller, how different the scene seen on the motion picture is compared to reality. In addition to this, the study also examines whether films can become a travel-generating factor, whether they can motivate the viewer, the prospective tourist, to travel.

3. CONCLUSIONS AND PROPOSALS

3.1 The most important findings and results of the research

During the examination of the Hungarian film industry sector, it was revealed that the unification of the legal regulation and the support system, as well as the development of the infrastructure, resulted in huge changes. The film industry has managed to generate economic indicators unprecedented in recent decades. This is clearly underpinned by the competitiveness study and by the fact that total spending in the film industry is expected to exceed HUF 100 billion every year, and HUF 200 billion in 2021. The National Film Institute has clearly sought to successfully reform the Hungarian film industry in line with European trends.

Following regional examples, they have encouraged the organisation of professional events, provided training and education in the area of film shortages, and expanded opportunities for applications. Professional workshops have also been organised to bring young people closer to the world of film,

which could help to build a generation of film-literate people in the future. These good practices have long been used in France, Spain and the United Kingdom. The task of education and professional training is to ensure a high-quality pool of professionals, which was also a prominent pillar during the competitiveness analysis. Favourable tax conditions and market prices, transparent legislation and high quality ensure that serious international productions continue to choose our country.

These essential elements are the factors for the success of the Hungarian film industry, which can be further enhanced in the future by increasing the popularity of national films, expanding professional training and international professional events, and broadening the spectrum of competitions. Thanks to the positive changes in the economic environment, film production in Hungary, which is the basis of film tourism, has also seen a noticeable upturn. Film tourism can develop spontaneously and consciously at film shooting locations, but it is more fruitful from the point of view of the destination if it is developed in a controlled and planned manner. (Irimiás, 2015). Based on the interviews, it became clear that there is a complete lack of coordinated management of film tourism services in the film tourism segment, which would require a thoughtful and long-term management. With this step, the competitiveness of the city could be increased, and Budapest could reposition itself on the film map of Europe. In order to achieve this, an open management capable of change and development is needed, who is aware of and aware of new market trends. The inclusion of Budapest as Budapest would also be an important aspect, which would greatly contribute to the successful implementation of the VisitBritain practice. The research related to the locations also highlighted that the appearance as a stunt location is extremely important. Although this phenomenon shows an improving trend, it is still not so

authoritative as to form the basis of complex marketing activities. Nevertheless, even with a double role, the capital is still able to make successful marketing moves. An outstanding example of this, is the Indian productions (*My heart belongs to someone else*, *Raabta*) which have succeeded in attracting Indian tourists to the capital. The number of tourists arriving from the country showed a clear increase in Budapest after the screening of the films. If Budapest were to shape itself more, it might increase the participation of potential film tourists in leisure tourism. This process would also boost the supply of film tourism products.

Very few visitors come to the capital specifically for film tourism products. Emphasizing Budapest and presenting it as itself would enable the destination to attract not only casual but also general and dedicated film tourists to the Hungarian capital. During the in-depth interviews, it was also revealed that there is an imperative need to expand the range of film tourism products, which does not require serious financial investment, only structured organization and the establishment of partnerships, which currently do not have many examples in the life of Budapest. A dynamically functioning network of connections would enable the Hungarian capital to develop a truly effective film community brand name, and with this step increase the attractiveness of the destination, placing greater emphasis on the successful operation of Budapest's film tourism services.

The research has highlighted the fact that Budapest can indeed show a thousand faces on the film screen, making it increasingly popular with international film productions. The reasons why it makes sense to film in the Hungarian capital can be summed up clearly: the favourable tax system, the excellent infrastructure, the diverse climate, the multifaceted cityscape and, of course, the highly qualified film professionals. These pillars strengthen Budapest on the film map of Europe and these elements ensure

that the Hungarian capital can continue to be one of the most popular filming destinations on the European market.

3.2 New and novel results of the research

The findings and results of the dissertation rely exclusively on international and domestic literature research, empirical data collection and their processing. Based on the results of the investigation, the following conclusions can be formulated in connection with the research questions.

The **first research question** focused on how film tourism can be defined, and what methodologies and perspectives have been used to approach the topic.

The industry analysis of the film industry, which is the basis of film tourism, has clearly shown that it can be classified as a creative industry, and the models can be divided into two positions, one that all sectors are equal, and one that core and supporting segments build the market. Researchers do not have a unified position regarding the classification, however, it can be stated that the film and video industry, as well as the visual arts, form an integral part of the creative sector. This is also indicated in the table summarising the models. Even the non-equal classifications place the film sector in the group of core arts and core industries. Film tourism itself has been approached by researchers from a number of perspectives, with the impact on the local economy, the country's image as a city, and the relationship with destination marketing being highlighted. In recent years, it can be clearly stated that the literature on film tourism has expanded, more and more researchers are approaching this extremely complex scientific field from more and more perspectives.

From the year 2005, the number of international scientific writings related to film tourism increased significantly, the

literature dealing with the initial conceptual definitions was later replaced by the appearance in practice, films and marketing, or the examination of a specific destination, and in the last decade already the negative effects were also emphasized. The study of film travel motivations has not received as much prominence in academic writing as the categories listed above. It is also clear from these approaches that the investigation of the existence, effects and relationship with the media of film tourism is no longer new, however, new research focuses on the role of destination marketing organizations and the use of films for promotional purposes. The essence of film tourism can best be formulated after Anna Irimiás, which can be paralleled with all the literature: "To see and fall in love, to fall in love and go on a journey"

Second research question: Which destinations can be considered priority film tourism destinations?

H1: Those film tourism destinations operate successfully, where the presence of market players is balanced, there is a management organization coordinating special products and, in addition to all this, well-identifiable, iconic locations appear in the film serving as a basis for motivation.

Thesis 1: After reviewing the literature, it is clear that destinations that have iconic locations, a very strong connection between the story of the film and the location, or a likeable protagonist that is very easy to connect with emotionally, are the ones that can benefit from filmmaking. In addition to successful film production, these elements are absolutely necessary for the development of profitable film tourism. In order to create not only a business demand (which is the most accentuated line in our country for the time being), it is necessary to create film tourism offer elements in the destination that are based on the motivations

of film tourists. In addition to the intrinsic motivation, the literature highlights the 3P system, which includes the elements of setting, plot and star. Those areas can benefit the most from film tourism, where both demand and supply elements can be found in the sector, and their balance and planning is carried out by a management that coordinates from above. The research revealed that today the most successful film tourism destinations are located in Barcelona, Dubrovnik, London, New Zealand and New York. The questionnaire research also supported these locations, and Rome and Paris were also added. The hypothesis was fully supported by the research, so it is clearly acceptable

Third research question: What competitiveness models can be used in the field of tourism and which model can be adapted in the case of film tourism?

H2: Using competitiveness models already used in tourism research, a model suitable for film tourism studies focusing on competitiveness can be adapted

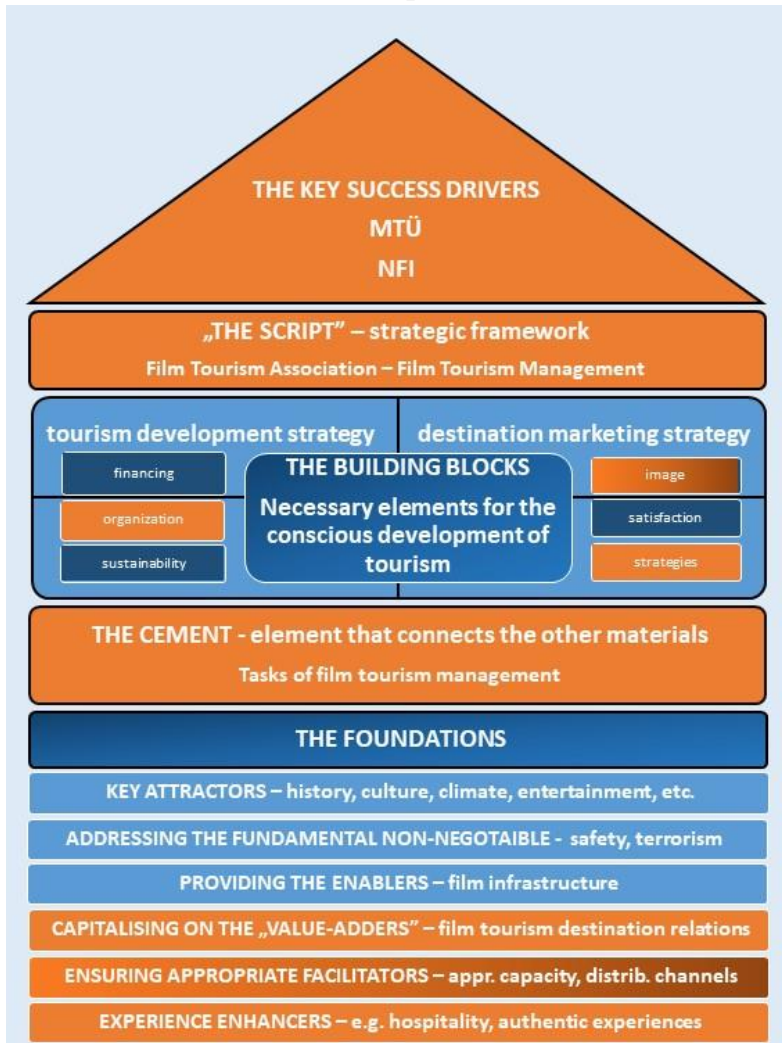
Thesis 2: Considering the competitiveness models used in tourism, a total of five were highlighted: the Poon model, the Porter diamond model, the Crouch-Ritchie model, the Dwyer and Kim model and finally the Heath model. Regarding the models, it can be said that the same factors and elements were taken as a basis during the creation of the models, and these are the supporting factors and resources, the core resources and attractions, the activities of the destination management (planning, development, policy) and the situational factors. However, from the point of view of tourism, the destinations are the basic units to be examined, so the models that take their specificities into account can be used in these areas. Adapting models for measuring competitiveness in the field of film tourism is not an easy process, however, in order to be able to follow the trends and

changes of the future, it is essential to develop a uniform examination system that takes into account the complexity of the special area and is also capable of comparative analysis of film tourism destinations. The Crouch-Ritchie competitiveness model and Heath's "house model" are the most appropriate models for the study of film tourism in Hungary and Budapest. If a comparative analysis is to be carried out, the former method (with appropriate classification of indicators) should be used, if the current situation is to be assessed, the latter model should be used. In the case of our country and our capital, we are undoubtedly talking about an emerging destination, so the application of the "house model" can clarify the areas to be developed and the areas worth developing. The house model is built on five pillars: the foundation (attractions, attractions, market relations), the cement (communication, monitoring), the building blocks (destination development), the "script" (key success drivers, strong interdependence, involvement of stakeholders in the design) and the roof (key to success).

This model can provide an excellent support for the quality development of individual destinations, since the importance of individual factors is formulated at the level of tasks, and the focus is on cooperation (networking), common vision and destination management activities. A detailed illustration and description of the model that can be adapted to film tourism and film tourism in Budapest is provided in chapter 6.2, but it can be said that many elements are missing or only partially implemented based on the pillars of the model. Such missing elements are: 1) market relations, 2) communication and monitoring, 3) involvement of actors in planning, and 4) vision and management. The model containing the specifics of film tourism is detailed in Figure 1, which also includes Hungarian specificities. Areas and elements in need of development have been highlighted separately, thus

revealing the sector's weak, non-existent or needing improvement points. Deficiencies are marked in orange, while areas to be improved are marked with a gradient. Based on the research, the model is feasible and applicable, therefore the hypothesis is accepted.

Figure 1: The film tourism competitiveness model for Budapest



Source: own research (2023)

Fourth research question: How does film tourism appear in the capital, what elements of demand and supply are found in Budapest?

H3: The capital city has a significant international film tourism offer, but the demand for film tourism is not yet significant.

Thesis 3: The boom of the film industry in Hungary clearly started with the 2004 film law. As a result, those international super productions started to come to our country, which began to discover the potential of our capital. As a result of the law, every year more and more film crews have turned up in Hungary, and Andy Vajna has played an indispensable role in this. The service productions generated an increasing economic impact, and Budapest became more and more embedded in the public consciousness as the "city of a thousand faces". Accordingly, we can primarily examine the situation of film tourism in Budapest as business tourism. Adequate film industry infrastructure, a high-quality team of professionals, and an excellent economic environment are all factors in the capital that will further generate share in the European filmmaking market. From a demand point of view, it can be said that there are very few leisure tourists in Budapest who travel to the city solely with a film motivation; this can be clearly explained by the fact that the capital very rarely presents itself on the film screen. Our film offering is also primarily based on the business segment, with a very broad spectrum of film studios for (service) productions

From a leisure point of view, we can distinguish four major categories of offer, these are: on-location, on-location stunts, commercial attractions and film tourism related to film production. There is a growing number of film-themed products in Budapest, but there is still plenty of room for improvement in the offer. Thanks to digitalization, an extremely modern film tourism

product, the Film Destination Budapest mobile application, was launched in 2017, which includes the filming locations in the capital and illustrates with pictures and videos how the location appeared in the given film. This could lead to the development of many more film tourism products where professional cooperation, rather than financial investment, could be the key to success. Research has partially supported the hypothesis, so the third hypothesis can only be partially accepted.

Fifth research question: how do film tourism destinations appear in the minds of travellers, how distorted is the link between reality and the film location, and does the film image influence travel decisions?

H4: The destination, which is often used as a dummy location in films, can make the viewer confused about the identification of the real space, which can have a negative impact on travel decisions.

H4.a: The ability to identify film tourism destinations in real space based on films is closely related to educational attainment.

Thesis 4: In the 21st century, thanks to digitalisation, film-watching habits have also been completely transformed. The questionnaire survey also clearly showed that 79.4% of respondents consume film content, be it a feature film or a film series, at least once or more per week. Televisions, cinemas and computers were the most frequently cited places and devices for film consumption. In terms of platforms, the enormous expansion of streaming service providers was also reflected in the answers, as Netflix, which is considered one of the most popular platforms these days, came in first place, HBO Max in second place, and the increasingly popular Disney+ platform in third place.

These platforms play an important role, as it has been proven many times that the works running here (Narcos, Squid Game, Game of Thrones) have a particularly great effect on the viewers, and in particular they have a positive effect on the motivation to travel. In the course of the analyses, it was proven that films have a role of mediating value and information, since almost half of the respondents assessed that motion pictures convey a positive image of the given destination, in this context they also confirmed that films play an extremely important role in the life of Budapest. The research revealed that in the case of the capital city, the iconic buildings and locations that appear as important locations in most films, such as the Parliament, the Buda Castle, the Basilica or Heroes' Square, were brought to life in the questionnaire. Thanks to a specific methodology, the questionnaire also included 12 image snippets during the query, which were adapted to the 3P framework to reveal the popularity and recognisability of each site. In relation to film tourism destinations, New York, Rome and Budapest had the highest association prevalence, but the map query gave different results. During the cognitive methodology, questions based not only on association but also on ready-made maps deepened the research. The three-step data collection based on ready-made maps provided help not only in whether each film could be recognized, but also in whether the respondents could place them correctly in real space. During the analysis, a significant difference was observed between the answers of the first and third steps, that is, it is extremely important that iconic locations and characters appear in certain films, as this way the future movie tourist can more easily identify the given destination in its real geographical location. The research accepted the fourth hypothesis, however, hypothesis 4.a is only partially accepted, since the identification of the destination depends not only on the educational level, but also on the genre of the film and the simplicity of its storyline.

4. SUMMARY AND POSSIBILITIES FOR FURTHER RESEARCH

Film tourism is an integral part of cultural tourism, and cinematographic works also have a cultural promotion role. In our country, this sector is playing an increasingly important role, as the new economic measures have made it possible for international productions with large crews and huge projects to visit our country even from overseas. Total film industry expenditure has also shown a steady increase since the 2004 film law, so it was essential to explore the competitiveness factors of the sector. The investigation clearly pointed out that the film industry infrastructure; the highly qualified professional workforce and the favourable economic environment are able to attract international productions to the country. Among the competitiveness models, the Heath model was used, which maximally highlighted the weak points of the sector, such as the lack of film tourism management and the lack of a film tourism strategy. This has a very negative impact on the development of film tourism products. The economic indicators do not lie, Budapest's role in Hungarian tourism is undisputed, so we must strive to make our capital more and more of itself on the screen, which will have an even greater tourist-generating effect. Based on the research objectives, the demand and supply elements in Budapest and the travel-inducing effect of films were further investigated. From the demand side, we can say that business film inquiries are flooding the capital, but from the leisure side, the situation is not so positive. Despite the increasing number of films being shot in Budapest, very few tourists come to the country solely because of the films.

On the supply side, the situation is much better, since both film studios (which serve the sector on business and leisure (Korda)

basis) as well as elements connected to film locations can be found on the palette. Due to the appearance of the capital as a stunt location, film themed tours appear several times as "around the world" trips. The other major part of the study focused on the relationship between films and travel motivations, and the location of film locations in reality. Based on the results obtained in the map and association tasks, we can say that the films and the locations are indeed closely related to each other, but for this it is necessary to emphasize the iconic locations that can also be found in the destination.

The films often generate a parallel reality in the viewer, which can sometimes lead to disappointment during the visit. The image recognition clearly showed that the leading countries and cities in the sector produced a much higher number of correct answers, so it is worthwhile to adopt more elements based on the methods developed there to our country (VisitBritain). During the three-step data collection, based on the ready-made maps, a significant difference was observed between the responses of the first and the third step, i.e. it is of utmost importance that iconic locations and characters appear in certain films, as this makes it easier for the prospective film tourist to identify the given destination in its actual geographical location.

In summary, it can be said that the sector ranks high on the market in terms of competitiveness, and the direction that has been taken in a positive direction recently with a lot of constructive steps is extremely gratifying. Improving or filling the gaps or weaknesses identified by the model is essential to achieve these fabulous visitor numbers not only in the film industry but also in the film tourism sector.

Due to the multidisciplinary nature of film tourism, it is possible to develop a research direction for the future by connecting it with

many other scientific fields. In relation to Budapest, it is worth examining how films and television series of different genres influence the image of the capital and the travel decision. An interesting point of view would be why the Hungarian capital is most often chosen for spy and action films. What are the buildings in the film, iconic locations that essentially carry this atmosphere. Another link would be to further examine the economic pillars mentioned in previous chapters of this research. The 2017 competitiveness survey conducted by the tax consulting company Orien Tax provides an excellent basis for this. In future, however, the study would focus not on countries but on European cities that are at the heart of film production and film tourism. Exploring the links with other sectors in tourism could also be an exciting avenue for future research. The appearance of accommodation and gastronomy in films also has a travel-inducing factor. Exploring and linking these international films with tourism products and locations could open up a new perspective for Budapest in the field of film tourism.

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