

## WELLNESS AND SPA TOURISM IN HUNGARY NOW AND IN THE FUTURE 2009-2011

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**"The most ancient habit of humanity is bathing in rivers and consumption of spring water which, according to their experience, were of healing effect"** (Vida, 1992). Hippocrates, the father of medicine, was the first to say that "nature cures illness". The culture of bathing goes back two thousand years; excavated remains of bath houses, frescoes and mosaics demonstrate that the Romans discovered and exploited these thermal water resources and introduced the bathing culture in Hungary. The Romans adopted the Greeks' bathing cult and constructed huge thermal baths during their empire. The Turkish baths, which are in operation till to-date, were of great influence upon our habits during the 150-year Turkish domination. Nature has been truly kind to Hungary. It has one of the richest geothermal and medical water resources in the world. 1.289 thermal springs, 39 medical baths, 5 medicinal caves, 48 certified mineral-, and 133 medical water springs, 4 deposits of therapeutic mud and 1 mofette are in the country. Nearly 300 thermal springs are used for bathing and about 130 mineral and medicinal springs are located in the capital, Budapest. There are 62 spa hotels, 39 facilities with qualified medical baths, 13 health resorts and in

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385 settlements all over Hungary there are baths/spas with healing water. The difference between mineral and medicinal water is that medicinal water is a kind of mineral water with medically proven therapeutic, healing effects. Thermal water is any water emerging from a natural source at a temperature over 30 °C. Health tourism relies on exploiting these natural resources, but unfortunately Hungary underutilizes them. The majority of the spas do not meet modern technical and healthcare standards (HNTO publication, 2001).

### The Hungarian spa concept

Spas have mainly been based on water to many Europeans, especially in Central and Eastern Europe so as in Hungary. The view of spas in Europe is different than internationally. Hungary is rich in historical spas and thermal water springs, their main focus is on the thermal water. The spa culture has 2000 years old history in Hungary. The Hungarian Baths Association was established in 1992 and then in 1998 became a regular member of the European Spa Association (ESPA). Their objective: *"The Hungarian Baths Association is an association of economic organizations and entrepreneurs operating baths and of the ones participating in planning, developing and building baths and providing for them"* – as it can be read on their website. The Hungarian Baths Association currently has 186 members (<http://www.furdoszovetseg.hu/en/tortenet.php>).

### Domestic (wellness) tourism

Health and wellness tourism are significant elements of Hungary's tourism supply. Wellness tourism is becoming increasingly popular among domestic guests. On the demand side, wellness markets are primarily domestic, so as in Hungary. In this country the wellness concept met with a warm response in the tourism industry as it strengthens the country's GDP when domestic tourism is efficient. In the past years numbers of wellness hotels have been built, in addition, the already existed hotels have widened their supply with wellness products and services. There is no standard EU regulation for the qualification of wellness hotels. In Hungary a decree regulates the hotels into categories and determines requirements for certain hotel types as for wellness hotels as well.

Domestic tourism showed dynamic increase in 2005. *"A man travels the world over in search of what he needs and returns home to find it."* (George Moore) According to the Hungarian Central Statistical Office the number of guests

	2005	2006	2006	2006/2005
Hotels	5,134,097	5,621,557	61.1%	+9.5%
5 star hotels	119,543	121,302	1.3%	+1.5%
4 star hotels	1,357,431	1,629,424	17.7%	+20.0%
3 star hotels	2,660,481	2,910,195	31.6%	+9.4%
2 star hotels	678,429	661,087	7.2%	-2.6%
1 star hotels	318,213	299,549	3.3%	-5.9%
Spa hotels	1,147,788	1,236,112	13.4%	+7.7%
Wellness hotels	490,300	834,487	9.1%	+70.2%
Guesthouses	1,488,285	1,405,028	15.3%	-5.6%
Tourist hostels	749,506	653,853	7.1%	-12.8%
Youth hostels	532,170	469,949	5.1%	-11.7%
Bungalows	709,620	683,438	7.4%	-3.7%
Camping sites	344,781	371,088	4.0%	+7.6%
Total	8,958,459	9,204,913	100.0%	+2.8%

Source: HCSO preliminary data

	Guest Nights			
	2003	2004	2005	2005/2004
Hotels	4,352,740	4,532,337	5,051,341	+11.5%
5 star	64,923	90,213	119,569	+32.5%
4 star	825,166	1,075,108	1,340,469	+28.8%
3 star	2,075,255	2,253,588	2,612,713	+10.5%
2 star	1,001,580	755,045	666,128	-1.6%
1 star	385,816	358,383	312,462	-13.1%
Spa hotels	771,637	1,010,913	1,142,869	+13.1%
Wellness hotels	n.a.	241,277	480,110	+99.0%
Guesthouses	1,470,824	1,401,084	1,425,111	+1.7%
Tourist hostels	875,714	788,788	717,740	-9.0%
Youth hostels	613,536	590,592	506,215	-14.3%
Bungalows	783,166	685,337	662,621	-3.3%
Camping sites	474,796	393,236	325,557	-17.2%
<b>Total</b>	<b>8,570,776</b>	<b>8,391,374</b>	<b>8,688,585</b>	<b>+3.5%</b>

Source: HCSO preliminary data

was up by 5.3 % and the number of guest nights rose by 3.5 %. (See tables above) In wellness hotels the number of guest nights doubled and spa hotels also claimed an above rise in the number of guest nights (+13.1%). The three most important regions of domestic tourism in 2005 were Lake Balaton, Budapest and Central Danube Region.

The towns of Hajdúszoboszló, Siófok, Sopron, Hévíz, Eger, Szeged, Pécs, Debrecen and Zalakaros proved to be the most popular besides Budapest. Wellness and medical tourists visit spas and spa hotels especially on the weekends, preferring four stars hotels. Some very famous spa towns are e.g. Hévíz, Zalakaros, Bük, Harkány, Sárvár and Kehidakustány. The domestic tourism is becoming stronger step by step. The supply is getting more sophisticated. The increase of domestic travels can be partly thanked to the Holiday Vouchers.

**Number of sales and redemption of Holiday Vouchers  
(2003–2006, million HUF)**

Sales and redemption of Holiday Vouchers	2003	2004	2005	2006
Sales	5099	7465	11855	23546
Redemption	3457	5491	8459	16107

Source. Hungarian National Holiday Foundation (HVG, 24 March 2007, p. 76).

In Hungary, holiday vouchers can be used as a form of payment in wellness hotels and thermal baths. Holiday vouchers are issued by the Hungarian National Holiday Foundation (HNHF) and can be used as a cash equivalent to pay at commercial and private accommodation facilities. Hungary introduced the system of holiday vouchers as part of social tourism scheme on January 1, 1998. The regulation in effect since January 1, 2003 increased the non-taxable value of holiday vouchers. In 2005, holiday vouchers generated around one fifth of the revenues of commercial accommodation in domestic tourism. In 2006 the value of sold Holiday Vouchers raised up to 23.546 billion HUF, although the redemption value was 16.107 billion HUF (See table above). 48 % of the holiday vouchers were used in hotels, and especially in wellness hotels. The number of

facilities accepting holiday vouchers is really high, and can be looked up from the website <sup>1</sup>.

On the other hand the economic restrictions can be felt on the domestic tourism as well. Some families cannot afford a domestic travel.

### Developing domestic wellness tourism

The provided products and services were not satisfying anymore for the international and domestic visitors, either therefore steps were essential in order to reconstruct the Hungarian health tourism. The Hungarian government has devoted a preferential role for the development of health tourism. This is proved by the Széchenyi Plan and the 10-year Health Tourism Development Programme, which gave priority to health tourism development beside other tourism sectors. The aim of Széchenyi Plan was to be one of the most determinative medical and thermal tourism powers on the European market.

### Supported Regions of the Széchenyi Plan

The 9 Tourist Regions	Supported projects (pcs)	Amount of subvention (million HUF)	Amount of development (million HUF)	Number of new jobs
Budapest and Central Danube	10	4 408	11 767	361
Middle Transdanubia	7	2 693	7 401	232
Western Transdanubia	28	10 469	29 640	930
Southern Transdanubia	10	2 628	6 819	230
Northern Hungary	12	2 282	6 447	175
Northern Great Plain	19	4 447	10 710	302
Southern Great Plain	14	3 997	8 675	185
Total	100	30 934	81 458	2 415

Source. DR. Imre Gellai (*Spa and Wellness Magazine*, November 2004, p. 28).

The 10-year Health Tourism Development Programme's strategic aim was to gain a leader position on the European health tourism market by the end of 2010. The Széchenyi Plan was announced by the Hungarian government on 15 January 2001 in order to advance the development of the tourism segment prioritising the health tourism segment. An estimated 31 billion HUF (see table above) has been invested for the projects connected to medical and thermal baths construction or reconstruction between 2001 and 2003 in 9 regions, in 57 towns, in 90 spas and hotels. (See table above) Developments have been done in order to improve medical spas. 2001 and 2002 were mainly about the constructions and reconstructions. The Széchenyi Plan consists of 6 sub-programmes, of which one deals with the

<sup>1</sup> <http://www.udelesicsekk.hu>.

development of healthcare and hot springs tourism. This sub-programme serves several purposes simultaneously, including:

- Increasing Hungary's tourism-related revenues through health and hot springs tourism;
- Attracting new three-generation target groups instead of the current scheme of dealing mainly with the elderly;
- Developing products that will be permanently competitive on an international scale;
- Developing complex service packages in health and hot springs tourism;
- Encouraging investments in quality and exclusive products and the provision of competitive investment opportunities in health and hot springs tourism;
- Extending the tourist season (KPMG Consulting, 2002 and Aubert, 2004).

The developments in 2001–2003 resulted in 14 % increase in the number of visitors and doubled the income of the spas (Gellai, 2004). The significance of capital investments in health tourism is demonstrated clearly by the 3,000 new jobs created by 120 projects in 2005. In 2002–2006 the value of the development of the spa and wellness hotels was more than 3.1 billion HUF and the same amount is devoted for the next three years' innovations as well (Világgazdaság, 2006). In wellness hotels, domestic tourism continues to be significant.

#### **Marketing domestic tourism by the suppliers and by the HNTO**

The makings, the services and the price-quality ratio are good in the Hungarian wellness hotels. It follows that there are a lot of satisfied and returning guests. On the other hand the bathing culture is still missing; the spa towns have no standardized atmosphere and many times the quality of the services is not that sophisticated (Szalai, 2004). Hungary is actively promoting health tourism, with a focus on wellness tourism. Hungary is now re-branding the nation as a centre for spa and wellness tourism. Focused marketing efforts are promoting wellness tourism while new hotel development includes wellness facilities. The slogan "Itthon otthon van" ("Here you are at home" in English) was communicated to Hungarian population and sought the raise the awareness and the popularity of domestic tourism. The HNTO cooperation with television channels and radio stations serve to provide information to the general public in Hungary. The HNTO has also allocated PR articles in several newspapers and magazines. Domestic journalists participated in study tours. The HNTO participates in several domestic exhibitions in each year. The most important ones concerning health tourism are the Utazás Travel Exhibition in March and the Spa and Wellness conference in November. The Hungarian National Tourist Office (HNTO) is promoting wellness tourism intensively. 2003 was declared as the 'Year of Health Tourism' by the HNTO. Thanks to this domestic campaign the reputation of wellness hotels and wellness facilities were

grown. The domestic campaign approached the Hungarian population with the message of travel for wellness inland in order to relieve stress. Hundreds of billboards, ads in the metro stations were placed. Some TV and radio channels also transmitted this message during the two month campaign. The demand for domestic wellness tourism was rapidly grown in 2004. The suppliers started to diversify their products and offer wellness packages, helping unfamiliar visitors. The HNTO first wellness related publication is the "Spa and Wellness" from 2002, in which the domestic health suppliers; 33 medicinal baths, 44 spa hotels, 43 wellness hotels, 5 medicinal caves, 1 mofette and 4 aqua parks can be found. The HNTO also issued other wellness publications such as "Spa and Wellness Packages", "Hungary for body and soul" and also there are brochures specifically to some regions, for example there is one for the Hévíz or Balaton region. The online travel database contains the data of 25.000 service providers and attractions. The database is available from [www.itthon.hu](http://www.itthon.hu) or [www.hungary.com](http://www.hungary.com) websites. Users can also obtain up-to-date information about the holiday vouchers. As there was no relevant marketing concept for health tourism the Hungarian National Tourist Office charged the KPMG Consulting Team with the completion of the marketing concept of health tourism in 2002. The report helped a lot the work of the HNTO where marketing recommendations for the development of the health tourism segment were stated after a through research both in Hungary and abroad.

### Wellness hotels

In general, wellness hotels offer the opportunity to balance body, mind and spirit, as well as offer pampering and stress relieving programmes. In addition to recreational baths, wellness hotels usually offer saunas, beauty services, and sport facilities in the location's natural setting. Some success factors for a wellness hotel are the attractive surrounding environment and the quality of services and products (Travel and Tourism Analyst, 2004).

In the Hungarian hotel industry wellness can be seen as a new market segment. Data is available on the occupancy by of the wellness hotels by the HNTO from the year 2004. The industry does not really know its specific target market and people. Tourists who would like to stay in a wellness hotel have sometimes no idea what a wellness hotel provides, why is it different from other types of hotels and what he or she can expect on his or

	Spa hotels		Wellness hotels	
	2006	2006/2005	2006	2006/2005
<b>Domestic</b>				
Arrivals (000s)	403	+5.9%	375	+62.7%
Guest Nights (000s)	1,236	+7.7%	834	+70.2%
Average Length of Stay (nights)	3.1	+1.7%	2.2	+4.6%
<b>International</b>				
Arrivals (000s)	320	-7.6%	106	+103.0%
Guest Nights (000s)	1,399	-11.1%	367	+73.6%
Average Length of Stay (nights)	4.4	-3.7%	3.5	-14.5%
<b>Total</b>				
Arrivals (000s)	723	-0.6%	481	+70.1%
Guest Nights (000s)	2,635	-3.2%	1,201	+71.2%
Average Length of Stay (nights)	3.6	-2.6%	2.5	+0.6%

Source: HCSO preliminary data

her wellness holiday? The problem can be driven back to the lack of standard definition of wellness; people do not know what it means. On the other hand, the wellness tourism industry struggles with lack of information about demand for wellness holidays, in this case it is really difficult for them to provide suitable supply. The HNTO with the help of the Hungarian Wellness Association prepared the criteria system for the wellness hotels in order to identify the wellness hotels, to inform the target markets, to meet the expectations of the customers and as a deduction of all of this in order to make visitors experience pleasure by wellness. The domestic arrivals, guest nights and average length of stay in Hungarian spa and wellness hotels have been increasing dominantly (illustrated on the table above). The domestic arrivals in wellness hotels rapidly grew (by 62.7%) in 2006 comparing to the year 2005. On the domestic wellness tourism market the three generation hotels have started to lead the demand.

"The most wellness hotels are either operated by the Danubius Hotels Group ZRt or the Hunguest Hotels Group ZRt" (KPMG Consulting, 2002).

### **The wellness decree in Hungary**

The Hungarian National Tourist Office and the Hungarian Wellness Association set a minimum standard requirement which all the Hungarian wellness hotels must meet. This criterion is for the customers, it is the guarantee of quality.

The 6 § c. abstract of the 54/2003 (VIII.29). Decree of the Ministry of Economy and Transport (the modification of the 45/1998 (VI.24) decree) defines what a wellness hotel is. It claims wellness hotel is a kind of hotel that meets all the requirements of a three star hotel, has well-educated, well-trained staff, provides facilities for healthy nutrition, sport, relaxation; provides wellness facilities and social programs and fit the named requirements of the 2. I/F enclosure, which states that a wellness hotel must have:

1. Minimum one indoor swimming pool.
2. Minimum two types of saunas or steaming bath.
3. Minimum four types of beauty services like face and body treatments, manicure and pedicure, suntan, hairdresser, and so on.
4. At least six types of massages, relaxation and other types of remedial therapies.
5. Traditional gastronomy for the region and Hungary and also healthy and vegetarian food and drinks.
6. Well-equipped fitness centre with cardio machines, fitness instructor, and personal and sport trainer.
7. At least four kinds of outdoor sport activities or oriental exercise programmes and also at least one type of aerobics class.
8. At least three types of social, cultural, music or art programmes.
9. In each shift at least one employee with wellness qualification (Sugataghy, 2004).

### Wellness Organizations

Originally it had been first suggested starting the wellness movement in Hungary at the conference of the World Health Organization in Copenhagen in 1994. This initiative, that was even supported by Dr. Siegfried Malich, the president of the European Wellness Union, met with warm welcome by the participants of the conference. Mr. Siegfried visited to Hungary in 1995 as a guest of Dr. Róbert Frenkl, professor and Dr. Pál Holczer, vice president. That year the Hungarian Wellness Foundation and Wellness Corporation were established. The Hungarian Wellness Association ("Magyar Wellness Társaság"=MWT) was formed in 2001 with the mission to be the representative of interest in the wellness industry. The HWA is a non profit oriented, politics free organization, working under the union rights. The establishment has been popularized the socially useful lifestyle concept that promotes health, physical exercises, the spiritually and physically euphoria and the combination of all these aspects.

The Hungarian Spa Tourism Association's (Magyar Egészségturizmus Marketing Egyesület=MEME) aim is to help the given natural resources to be well-known within the borders and internationally as well, and also to present in an attractive way the Hungarian spas, spa-, and wellness hotels, their products and services, analysing their curative effects and emphasise their uniqueness. All the efforts of the MEME aspire to make health tourism successful nationally and internationally.

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***Оздоровчий і СПА туризм в Угорщині сьогодні та у майбутньому.** Угорщина має великі ресурси термальних і медичних вод, що дає можливість для розвитку оздоровчого та СПА туризму в країні. СПА культура Угорщини має 2000-річну історію; із 1992 р. країна є членом Європейської СПА асоціації. Оздоровчий туризм складає велику частку внутрішнього туристичного ринку Угорщини, кількість відвідувачів постійно зростає, оскільки будуються нові та вдосконалюються вже існуючі курорти. Для досягнення високих європейських стандартів у цій галузі уряд країни розробив та впроваджує програму розвитку оздоровчого туризму, якому надано пріоритетний статус. У країні були розроблені вимоги, яким повинні відповідати всі готелі. Велику роль у розвитку галузі відіграють профільні організації, а саме: Угорська асоціація оздоровчого туризму та Угорська асоціація СПА туризму.*