ACTUAL TRENDS OF HEALTH TOURISM IN HUNGARY: THE CASE OF HÉVÍZ

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Abstract The leading tourism product of Hungary is health tourism. Both as an effect of the financial supports after the change of the regime and the national marketing strategy, health tourism is the first among the tourism products of the country. In the range of the top 10 most visited cities of Hungary annually the stronger and stronger health tourism resorts and spa towns are listed. The study researches the national trends of health tourism together with the peculiarities and restructuring of its visitors highlighted to the characteristics in Hungary. The study demonstrates the domestic trends through a case study of Hévíz.

Key-words: health tourism, Hungary, Hévíz, demand trends, supply trends

INTRODUCTION

Health tourism became one of the leading tourism products of present day tourism industry in the world. In the background of the continuous increase we can find the increasing health consciousness on the demand side which can be detected as general trend in the developed countries. In the age of nearly 3 decades of intense increase of health tourism the product types itself went through differentiation and continuous reform as well. Hungary is one of the leading health tourism destinations of Europe but in certain branches
Actual trends of health tourism in Hungary: the case of Hévíz

1. THE TREND OF HEALTH TOURISM IN THE WORLD AND IN HUNGARY

In our accelerated and changing world health consciousness and the related way of thinking and product choice becomes more and more accentuated so we can state that it is one of the decisive trends of the 21st century. Numerous indicators prove this since on the international level 3.9% of all the travels are derived from health tourism, providing 513 million USD income (http://informahealthcare.com/doi/abs/10.1586/14737167.6.4.447). On the other hand in 2011 2.4% of the European travels derived from health tourism whereof we can see the dominance of the sector. It is also not a negligible fact that in Europe the motivation for health conscious travels was 4% (iththon.hu).

Of course for this process the demographic changes greatly contributed in the last decades and the changing and differentiating demand trends as well. People turn more and more to healthy lifestyle and try to adjust these elements to their life. Out of them wellness and fitness belong to a highlighted type and also appear more and more the related beauty treatments and other services and treatments connected to heath tourism (such as diets, cures etc.). By today this “industry” does not rely anymore only on medical waters just as earlier, but treatments and other services come into prominence orientating to the needs of the demand.

The most important motivation for the demand in this case is health and the aspiration for healthy lifestyle since one of the features of the ageing population is that it aims to find cure for the existing illnesses and also to prevent the non-existing ones, so prevention as well receives a role in product development.

Of course today innovations have important role which is acutely true for tourism. The basis for modern health tourism is that the branch uses innovative equipment and technology complemented with such design elements as well with which more and more the increase of the demand can be achieved. It is characteristic that the services are not realised one by one but in a complex package. Beauty treatments are involved more and more in the field of interest of the strengthening consumer society (beauty services, aesthetical dentistry) and also the prevention methods in order to achieve the permanent achievement of the capacity to work. The senior age group was always a highlighted market segment for the medical part of health tourism however, we can observe more and more that the prevention elements become decisive in this group as well. The needs of the demand become diverse and so the service providers have to answer for this phenomenon with complex packages since at present it is not enough to provide services based on only one tourism product.

The other valorised area is the increase towards the demand for the already mentioned medical treatments (which is dominantly specialised to foreign guests) which is carried out with modern technology. The health tourism basis of Hungary is provided by the unique thermal and medical water resource coupled with complementary services. After the change of the regime with the forge ahead of wellness Hungary also joined to this trend and with its favourable prices it received a competitive advantage compared to the neighbouring countries. In Hungary health tourism in a narrow sense can be divided into two parts:
medical and wellness tourism. In the country medical tourism is connected with the qualified spas (66 pieces), the settlements that were qualified as medical places and the medical caves, medical muds and a mofetta (dry spa) guaranteeing the success for recreation and the medical treatments (ESKI).

The aim of wellness tourism in a narrow sense is the preservation of health and the initiation of the harmony of body and soul. In this trend the eastern medical treatments and therapies are becoming more and more fashionable (Thai, Chines and Indian methods). In many cases, however, it is problematic that this point of view is more for fashion than for a conscious decision and by the end of the holidays, people get back to their every-day lifestyle.

Analysing the supply and demand trends we can state that taking into consideration the domestic processes the specific spending is the highest at the travels with the aim of health preservation. Foreigners spent 127 billion HUF holidays with medical and wellness aims (http://itthon.hu/documents/28123/4083489/jeltur13.pdf/08be3529-e7c3-4002-9958-42b671e2775a).

Out of the foreigners travelling to Hungary and out of the ones who spent more than 4 nights 17.4% had a motivation related to health preservation while out of the short stays (2-3 guest nights) this ratio was only 2.8%. These tourists, either domestic or foreign, in general stay at medical or wellness hotels near to medical establishments. Out of the foreign guest nights between 2011 and 2012, the number of guests who stayed in wellness hotels grew by 33.1%. In the medical hotels (From July, 2012 the Central Statistical Office of Hungary only provides data about those functioning medical hotels which are present in the register of the National Office of the Chief Medical Officer, Public Healthcare Division – Országos Tisztifőorvosi Hivatal Közegészségügyi Főosztály) the number of the guest nights by domestic guests grew by 2.2% and by foreign guests by 2.9% according to the data of the former year. We can find 5.8% of the bed places of all the commercial accommodations in the medical hotels where 42.6% of the guest nights are provided by the domestic guests. The mean length of stay in the medical hotels is higher than the national average. Health tourism a tourism product is very adaptable if we have a look at it from the point of view of seasonality. The advantage of these establishments is that they can provide adequate services in the complete year so the problem of seasonality can be solved.

As we have seen it at the analysis of the trends, health tourism is a product which quickly and diversely develops, reacts on the market change and is open to the innovations as well.

The study is based mainly on secondary sources and the database of the Hungarian Statistical Office (KSH) . Besides these we had an online questionnaire with the Hévíz – being our case study – Tourism Destination Management Organization and we had studied the organization’s online (eg. webpage, social media sites) activities.
2. AN ANALYSIS OF THE TRENDS OF HEALTH TOURISM: TRENDS AND TENDENCIES IN THE TOURISM OF HÉVÍZ

We chose the case study for our research the town of Hévíz which is the most well-known spa town of Hungary attracting the most visitors and providing the highest qualities. Due to its leading medical tourism role it is perfectly adequate to analyse the present health tourism trends on the local level.

![Regional Map of the Balaton](image)

**Fig. 1. Hévíz in the Lake Balaton Region**

2.1. Guest structure

The uniqueness of the spa town is provided by the world famous Hévíz Lake and the related medical tourism services. Due to the continuous developments the spa and the settlements became more and more visited, today the number of visitors buying a ticket for the Lake Spa exceeds 1 million annually. Taking into consideration the total number of visitors the town of Hévíz is the second most popular Hungarian town, only Budapest comes before this settlement in the list. In 2013 the commercial accommodations of Hévíz attracted 200,000 guests out of which more than half was foreign visitor, while the number of guest nights at commercial accommodations exceeded 1 million (KSH/CSO, 2014).

The quality health tourism, besides the domestic guestflow, attracts significant amount of foreign visitors to the spa town. The number of foreign tourists was always significant in Hévíz since in the socialist era already a lot visited the place especially from
the former Eastern and Western Germany. Hévíz, correspondingly to Lake Balaton, was one of the locations and meeting points of the tourists of Eastern and Western Germany out of whom many came back to the town even after the change of the regime. The German and Austrian guests are decisive even today but from the end of the 2000s, accordingly to the Hungarian trends, the guests of the new sending countries appeared in Hévíz as well. The ratio of the Russian, Czech and Chinese guests is growing year by year due to the effective marketing activities and the up to par and competitive medical tourism services. From 2012 Russia is the 2nd most important sending country of the spa town after Germany, coming before Austria which was 2nd for long years (KSH/CSO, 2014). In several European traditional spa towns, such as the Czech spas as for example Karlovy Vary, a similar process took place in the last 10 years since health tourism services became very popular among the Russian guests. The Russian guests look for such spas as Hévíz where, besides the complex treatments, they can find high quality services and varied program supply in the town.

96.9% of the Russian guest nights were spent in hotels (KSH/CSO, 2012), so they almost exclusively looked for the high category, usually 4 and 5 star hotels. For this demand the accommodation supply is adequate in Hévíz and the town also adapts to this situation since in the high quality medical and wellness hotels a wide range of medical treatments is available for the guests. Private accommodations and pensions are only very rarely chosen so in this group of accommodations the Hungarian and German majority remained even at present. Besides the Russians the Chinese tourists are new as well for whom it is characteristic that they take part in travels throughout the complete country or several countries, visit several spas but stay only for a short time at every place. In Hévíz in many cases they spend only 1 night than travel along. The number of the Czech guests increases as well in the spa towns such as in Hévíz. The Czechs are definitely inquiring about quality medical tourism in Hungary and by today they became one of the most important guest segments for certain spas (they provide 30.1% of the foreign guest nights in Bük and 36.6 of the foreign guest nights in Sárvár) (KSH/CSO, 2013).

2.2. Accessibility

In health tourism today it means a competitive advantage when the given destination can be accessed fast and easy. In Hévíz in the appearance of the complex foreign clientele the Hévíz-Balaton Airport in the neighbouring settlement, Sármellék plays an important role. From the spring of 2012 the operator of the airport is the company in the exclusive ownership of the local government of Hévíz. The airport provides and advantage for Hévíz compared to numerous other rural spas since the foreign tourist can very easily access the area, as Hévíz and Lake Balaton can be reached by 15 minutes from the airport. The charter flights are continuously arriving but the supply has been broadened with on scheduled flights as well in the latter years. The airplanes are arriving mostly from German regions but according to the development targets from 2013 onwards a permanent on scheduled flight will be functioning between Russia and Sármellék, so the Russia tourists can more easily access the spa town. Due to the most recent development from the summer of 2014 guest will also come to Hévíz from Prague and according to the further targets they start to open to the Scandinavian market as well.
2.3. Related services

Thanks to the new guests we can have a look at the reorganisation of services in Hévíz. Complementing the medical services, the ratio of the guests coming because of the beauty treatments, wellness and medical tourism is constantly growing. Most of all the dental and plastic surgery treatments are popular in Hévíz, we can find several special clinics as well in the town. In the supply of the high quality hotels the different medical treatments also play an increasing role, which usually take a longer time (even 2-3 weeks).

The foreign guests are characterised by long time of stay (in Hévíz the average is 6.5 days, KSH/CSO 2014) and willingness for high spending and moreover in the case of the Russians year after year they come back to the region positively effecting the local population and economy as well. In Hévíz a growing number of service providers appear who only target the higher spending clientele, usually the Russians, with their different luxury products and treatments. The new service providers aiming to target the Russians appear in Hévíz mainly in fashion (an exclusive fashion saloon with peculiar supply even in the region), in beauty treatments (hair dresser, cosmetics), in different beauty medical attendances (plastic surgeries) and in the high quality gastronomy. The Russian language knowledge became an advantage in the latter years in the labour force market of Hévíz. Mainly the restaurants and hotels are looking for such waiters and receptionists who can communicate on an adequate level with the Russian guests.

It is characteristic to the Russians that after they came back several times to rest and cure in Hévíz, they start to like to region as much as to buy property in the area. The local property agencies also take advantage of this phenomenon so they have particular supply configured for the Russian guests. They are advertising their supply in Russian with the help of Russian interpreters. Moreover several new property agencies appeared in the last 3 years in Hévíz specialising themselves only on the Russian customers. Since the demand is great from the side of the Russian and Ukrainian guests, opposite to the national tendencies the prices of the properties constantly grew on the local estate market.

2.4. Tax incomes

The high quality of services is characterising the domestic health tourism and since the attraction is the medical water and treatments can be used in the whole year with the same circumstances, seasonality is characteristic only in a very small extent. The spa towns possess great tax incomes for instance in Hévíz in 2011 the sum of the tourism tax exceeded 441 million HUF: From these amounts of money the local governments spend a lot to the constant renewal and maintenance of the settlement environment so the spa towns of Hungary are usually equipped with modern infrastructure and in many cases a unique façade. In Hévíz the ordered and clean settlement, the great green areas and the elegant parks play an important role in the image of the town as well.
2.5. Tourism management in Hévíz

In the following the paper deals with the management of Hévíz and its peculiarities. In Hungary the need to introduce and create tourism destination management (TDM) appeared in 2005 as one of the priorities of the National Tourism Development Strategy (NTS, 2005). The tendering of the first applications for this reason took place in 2008 (within the framework of the Regional Operative Programmes). By today the management activity within an organised framework is an inevitable tool for the competitive step into the market. The tourism potential of the different destinations is strengthened by the creation of the management system based on the bottom-up and partnership approach (Lengyel, M. 2008). Besides the settlements along Lake Balaton the settlements with smaller tourism potential but with diverse attractions also realised the chance of the creation of the TDM system so in Hungary there are 81 functioning organisations on the local level, 9 on the micro regional level and 1 on the regional level (NGM, 2014; MTDMSz, 2014).

In Hévíz a tourism association within the framework of the TDM is functioning since 2009, where among the members the number of tourism service providers is high – characteristic to the health tourism destinations – while the number of local governments joining to the organisation is only 1. The reason for this is that the tourism indicators of the area are outstanding and the number of the registered guest nights in Hungary is the second highest, due to which the tourism tax incomes are also high (KSH, 2014), so there are adequate amount of financial sources for the maintenance and functioning of the organisation. Hévíz possesses such characteristic tourism products (health tourism), which, as we saw it earlier, plays its part in the competition of the destinations per se, since it has a well segmented, stable clientele. Because of the product characteristics (low seasonality, longer duration of stay, higher tourism income) the joining with other settlements only appear on the level of co-operations. The reason for this is more the complement of the supply of health tourism with other tourism products and the utilisation of the advantages provided by the joint marketing activity. Among the members of the TDM organisation the accommodations represent themselves in the greatest number among which, due to the accommodation structure of the area, we can find private accommodation providers also in a great number. A further characteristic of the TDM organisation of the health tourism destinations is that among the members of the organisation the medical service providers who do not belong to the profile of the medical place appear (dentistry) and the beauty service providers as well with their complementing services (hair dressers, cosmetics). In the case of Hévíz the membership contains even bus companies and car rentals (because of the proximity of the Sármellék airport) so the work of the association covers almost all the related service branches.

The scope of the tasks assumed by the organisations covers a wide field (Bieger, T. 2005; Lengyel, M. 2008; Aubert, A – Berki, M. – Mészáros, B. – Sarkadi, E. 2009) but the tender announcements greatly determine them so because of this we frequently meet with the same solutions during the functioning of the TDM organisations. The tasks cover the roles of the attraction, visitor and service provider management. They appear in a complex way in the every-day life since the activity of the organisation covers the complete destination. As we could see in the case of Hévíz the ones involved in management are rather great in number, and so the handling of this mass mean a great challenge during the successful market initiation. Besides the representation of interest the touristic information
provision gains an important part. The TDM organisations are operating the tourism information offices of the settlements and provide the other means of information provision for the tourists arriving to the settlement (information signs, touch info points). Besides the elements of the traditional communication (leaflets, pull-outs, tourism publications, tourism fair appearances) the internet receives a growing role in sharing the information (Buhalis, D. 2003; Buhalis, D. – Law, R. 2008). Accordingly Hévíz also possesses an own tourism webpage where one can find tourism and other useful information on the destination before and during the travel as well. The importance of the social media is bigger and bigger so the settlements possesses (Amersdorffer, D. – Bauhuber, F. – Egger, R. – Oellrich, J. 2010) and own YouTube channel and Twitter and Facebook site with which one can reach a great potential number of followers and tourists. These platforms make communication a lot easier since with them the up-to-date information can reach the ones concerned easily, fast and cheap (Török, P. 2002), but the prompt experience share can hold the same amount of dangers as well. This latter danger however strengthens that in the management activity a great emphasis should be laid on quality management in order to attain as many satisfied tourists who potentially come back again as possible.

One of the effective tools for visitor management is the tourism card kártya (Zoltan, J. – Masiero, B. 2012; Pechlaner, H. – Zehrer, A. 2005) which helps the tourist during the stay at the destination since it brings the supply of the target area to the guest with reductions, free presents and services. With this not only the local attractions, the elements of the tourism infra- and suprastructure but a wide range of local services (the quality monitored by the TDM organisation) will be coming into the consideration of the tourists promoting the willingness to requisite them. Such a guest is authorized for the card that can be required at the accommodation, who spends at least 2 nights at the settlement with a validity from the day of the arrival to the end (midnight) of the day of departure.

CONCLUSIONS

In our study we intended to demonstrate the actual trends and processes of Hungarian health tourism and its supply and demand factors through a concrete sample area, Hévíz. As we could see health tourism is a very flexible touristic product and its significance increases year by year in Hungary especially in certain areas, like in Hévíz where health tourism is very dominant.

Our sample area is the second on the list of the guest nights in Hungary and its tourists come mainly from abroad because of the high standard of health tourism and this special attraction (lake). Besides the change of the guests and its impacts one of the most characteristic processes is that the product becomes complex which can also be observed at the broadening of the related services. For the people who want to spend their holiday here it becomes more and more important that they could have the opportunity use any other leisure activities outside of the bath. Not only cultural programs but beauty and dental services which requires longer staying. Another important fact what we have to mention that this kind of tourism is usually attract 4-5* hotels which also represent quality. Regarding to these data we can state that Hévíz has stable guest background which indicates other good index-numbers in other fields too such as investments, taxes etc.

On the other hand in the field of tourism management the delineation of the management peculiarities of the health tourism centres are characteristic differentiating
them from other types of destinations. The TDM is using different social media methods to utilize its advantages because nowadays these segments can be very helpful in the life of a destination.

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