



EUROPE: *Hungary*

SPA & WELLNESS INDUSTRY

Hungary is one of the major spa destinations of the world, a tradition which goes back to Roman times. It has over 400 hot springs and Budapest is often called the “Spa Capital” because it is the only capital city in the world with real hot springs inside the city boundaries. Many of Hungary’s spas (that are actually public baths based on thermal and/or medical waters) are visited by domestic tourists or patients who have a doctor’s prescription or holiday vouchers (a tool for support used in social tourism) and are entitled to various treatments everyday, sometimes for several weeks.

The main focus of most of the health tourism attractions in Hungary is on medical tourism. There are relatively few leisure facilities with only a handful of aquaparks and hotels specifically serving families with children, for example. Only 50% of spa hotels, and 45% of thermal baths offer wellness treatments, which mainly consist of saunas and traditional massages, although there is a gradual increase in the diversity of massages (e.g. Thai, Ayurvedic). It is only really the wellness hotels which offer a whole range of wellness facilities, but even here, more spiritual and psychological forms of wellness (e.g. lifestyle consultation, occupational wellness) are largely absent. Medical wellness is a feature of some spa hotels, which means a practitioner-supervised wellness programme. This seems to represent something of a stepping stone from curative medical to preventative wellness tourism.

ECONOMY

According to the data of the Central Statistical Office (Hungary) there are 50 medical and 90 wellness hotels in Hungary, with 13,186 and 13,592 beds, respectively. The more established medical hotels are mainly visited by foreign guests (especially from Germany and Austria), whereas the guests in wellness hotels are dominantly from Hungary. Medical guests stay longer than average (domestic guests: 3 nights, foreign guests 4.5 nights), but the average length of stay of wellness guests is lower than that (domestic guests: 2.2 nights, foreign guests 2.8 nights).

Contrary to what the abundant natural healing resources may suggest, the Hungarian population health data is below the European Union average and residents have been slow to embrace new trends in preventative wellness tourism. As a consequence, Hungary has one of the lowest life expectancies in Europe, high levels of depression and suicide, a poor diet with excessive alcohol and cigarette consumption, and relatively low levels of exercise. Hungarians also visit the doctor an average of 12 times per year (compared to 3 times per year in the UK) and take large quantities of traditional medication. Governments have not helped with their lack of public health awareness campaigns and failure to implement a smoking ban in public places. 88% of the respondents

declared that they do not care at all for wellness, bio, and fitness “madness”. As one aerobic trainer suggested: people do not understand the real meaning of wellness in Hungary. They cannot link fitness, spas, massage, nutrition and so on into one concept. Wellness for them is more about relaxation, avoiding stress, spending time with their family, and perhaps visiting the countryside – and sitting in thermal pools!

SPA & WELLNESS RELATED PROJECTS

The National Development Plan (NDP) identified natural healing resources to be the key element in deciding which developments should take place. This objective resulted in the upgrade of existing and the development of new thermal (medical) water based baths (or spas as the local terminology, wrongly, goes) and the renewal of nearby accommodation facilities. During the last 2-3 years the NDP provided support for over 30 development projects all around the country (with 10.5 billion HUF support – app. €37 million). Six projects, predominantly from traditional bath-towns, were qualified as ‘special development’ and were awarded €42 million.

The Ministry of Local Government (the responsible body for the implementation of National Tourism and Health Tourism Strategies) has defined the preferred special characteristics (positions and specialisation) for most thermal baths. These preferences, however, remain suggestions, since the National Development Agency (the governing body of development funds) is independent from the ministry. This leaves us with the risk that most of the new developments follow the same pattern of what we have seen in the last few years: creating copycat facilities.

The developments represent, however, a bi-polar situation. There are a few new facilities (e.g. Spirit Hotel & Spa in Sárvár or the Rácz Hotel & Thermal Spa in Budapest) that follow the same trend of what we can observe in Austria, Slovenia or Germany, i.e. high-end wellness services with 4 or 5 five star accommodation facilities. The other end of the spectrum is the continuation of sanatorium/hospital-like thermal or medicinal baths that are serving predominantly patients financed by the National Health Fund.

Among the new facilities are some of the largest of their kind in Central and Eastern Europe (e.g. Aqua-Palace in Hajdúszoboszló or Aqua-World in Budapest). These new establishments follow the indoor-pleasure-bath-complex trend set in Austria and Germany.

The Hungarian Hotel Association is working on the refinement of standards both for medial and wellness hotels. These new standards would need to help existing facilities and new developments alike to improve competitiveness and service quality.

OPPORTUNITIES

In early 2010 the second part of the National Health Tourism Strategy was completed. This new document focuses mainly on the medical side of health tourism (especially on therapeutic/rehabilitation treatments and operative procedures). This strategy is expected to provide support for new developments, initiated especially by the health sector (e.g. hospitals). There is a strong need for improvement and diversification of existing services and facilities. Product development, based on local resources and materials, would be essential.

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