

## *Health Tourism in Hungary*

(Excerpt from them marketing plan of Hungarian Tourism Plc. for 2014)

According to the forecast of the World Health Organization, by 2022 tourism together with the health industry will be one of the most important economic sectors. The most important demographic trend of the developed countries (our main source markets) is the growing share of elder population. The more health-conscious and experienced senior travellers with high disposable income create demand for the health tourism industry. Furthermore in welfare societies, there is a growing need for the combination of self-financed medical treatments with tourism experiences.

Health tourism has an important role both in domestic and inbound tourism in Hungary. Nearly one third of domestic overnights at public accommodation establishments and 47.6% of domestic overnights at hotels were registered in spa and wellness hotels in 2012. (In case of public accommodation statistics the motivation of guests is not examined by the Hungarian Central Statistical Office (HCSO).)

The HCSO examines only wellness as a motivation in case of the *overnight tourism trips of Hungarians (Table 1)*, medical treatment is not included in the list of motivations. It is partly due to this that health tourism (actually wellness/prevention) is behind VFR, leisure, sport ó and in many cases hobby ó on the list of most important motivations. In four tourism regions (Lake Balaton, Northern Great Plain, Southern Transdanubia, Western Transdanubia) wellness tourism is on the third place.

Table 1

### **Summary data of the Hungarians' domestic overnight trips, with a special focus on trips with wellness motivation, 2012**

	<b>Tourism motivation</b>	<b>Wellness* motivation</b>
Number of tourist arrivals (thousands)	16,512	540
Length of stay of tourists (thousand days)	68,859	2,834
Expenditure of tourists (million HUF)	257,659	21,502

\*Medical treatment is not included in the list of possible motivations.

Source: HCSO

According to the data of HCSO's *international visitor* survey (Table 2), the third most important reason for foreign visitors (not only tourists) for visiting Hungary in 2012 was health tourism (medical tourism and wellness are both included in the list of possible motivation in this survey; the first motivation was VFR, the second was city tourism). In 2012, health tourism was the most important reason for visiting Hungary of 15.2% of the same-day visitors arriving with tourism motivation, and of 12.3% of all (same-day and overnight) tourists. Statistics of public accommodation establishments show the same tendency: nearly one fifth of international overnights of all public accommodation establishments and 23.5% of international overnights of hotels were registered at spa and wellness hotels in 2012.

Table 2

**Summary data of international tourists visiting Hungary with a special focus on health tourism motivation, 2012**

	<b>Total tourism motivation</b>	<b>Health tourism* motivation</b>
Number of tourist arrivals (thousand)	14,879	1,961
Length of stay of tourists (thousand days)	60,625	9,248
Average length of stay of tourists (days)	6.3	7.9
Expenditure of tourists (million HUF)	809,113	141,576

\*Medical treatment and wellness.

Source: HCSO

The average length of stay is longer, the average expenditure per trip is higher, seasonality is weaker in health tourism, and health tourists tend to consume services of higher quality (Table 1 and Table 2).

Table 3

**Summary data of spa and wellness hotels, 2012**

	<b>Hotels total</b>	<b>Spa hotels</b>	<b>Wellness hotels</b>
Room capacity in hotels (rooms)*	58,214	4,578	11,161
Arrivals at hotels (thousands)	6,584	501	1,506
Of which: international arrivals (thousand)	3,689	236	392
domestic arrivals (thousand)	2,895	264	1,113
Overnights at hotels (thousand)	16,624	1,828	3,778
Of which: international overnights (thousand)	9,582	1,045	1,205
domestic overnights (thousand)	7,042	783	2,573
Gross revenue of hotels (million HUF)	242,203	29,124	61,994
Of which: accommodation fee (million HUF)	135,632	13,711	29,566
catering (million HUF)	50,820	4,907	15,210
other revenue (million HUF)	55,751	10,505	17,219
Accommodation fee/arrival (HUF)	20,601	27,378	19,636
Of which: international (HUF)	24,674	38,298	25,332
domestic (HUF)	15,411	17,619	17,628
Accommodation fee/night (HUF)	8,159	7,499	7,826
Of which: international (HUF)	9,498	8,661	8,251
domestic (HUF)	6,336	5,948	7,628
Gross room rate at hotels (HUF)	14,630	13,397	15,475
Hotel occupancy (room, %)	47.7	62.1	47.1
REVPAR (HUF)	6,975	8,315	7,292

\* Data of 31<sup>st</sup> July 2012.

Note: a spa hotel is a hotel which complies with the hotel standards, furthermore provides its patients with possibilities of therapy under medical control using mainly natural healing resources at its own medical facilities or in cooperation with medical institutes, and complies with the EüM (Ministry of Health) Ministerial Decree 74/1999 (XII.25.). A wellness hotel is a hotel facility which complies with the hotel standards of minimum 3\*, the hotel is operated and managed by properly trained and certified staff, provides gastronomic, sport, relaxation and wellness services suitable for healthy living.

Since July of 2012 HCSO publishes data of those operating spa hotels which are registered at the Public Health Department of the Office of the Chief Medical Officer.

Source: HCSO

The occupancy rate (based on rooms) of spa hotels is above average, while wellness hotels have an average occupancy rate. In 2012, the occupancy rate (based on rooms) in public accommodation establishments was 39.4%, while at hotels 39.4%, at spa hotels 62.1% and at wellness hotels 47.1% (*Table 3*).

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