

The Tourist Image of Hungary¹

The tourist image of Hungary cannot be separated from the general image of Hungary: factors of the political, economic, natural, cultural, technical and social environment that affect tourism also affect the tourist image.

In 2000, the Hungarian National Tourist Office began to study the image and perception of Hungary as a tourist destination in the most important origin markets for Hungary and dynamically developing markets with a low market share as yet: primary research was carried out in France and Spain in 2000, in Belgium in 2001, in Italy in 2002, in Poland and Great Britain in 2003, and in 2003 the research continues with markets in Germany, Austria and the Netherlands.

On the basis of the primary and secondary research results available to the Hungarian National Tourist Office, it is important to highlight that each country **has a very different image of Hungary**, due to their geographical distance and their historical, political, economic and cultural ties to Hungary. The great majority (89.5 %) of foreign guest nights spent in public accommodation establishments in Hungary were spent by tourists arriving from Europe, where there are significant differences in the image of Hungary between western European and eastern European countries. On the basis of the primary research finished in 2003, there is typically a low level of knowledge about Hungary in western European countries. People who have not yet been to Hungary typically know nothing or very little about Hungary. More perception, and a primarily positive opinion, is held by those who have been to Hungary. As a result, there is no defined image of Hungary in western European origin markets. By contrast, in Eastern Europe – partly because of a shared historical past – people know much more and have more positive opinions about Hungary, as demonstrated by the market research carried out in Poland.

In **western European countries** the proportion of those who have already been to Hungary is low: between 1999 and 2002 12% of the Italian population, between 1998 and 2000 9.1% of the Spanish population, between 2000 and 2002 5.1% of the German population, and between 1998 and 2002 a mere 2% of the British who travelled abroad, travelled to Hungary. In line with this, the image that has formed by Hungary is typically very patchy and mainly linked with negative associations.

¹ Source: primary market research carried out by the Research Directorate of the Hungarian National Tourist Office and purchased research results.



The proportion of those with no information about Hungary is significantly higher in western European countries than it is in Central and Eastern Europe, with 42.8% of Italians interviewed (6.8% of those who have been to Hungary) having no information about Hungary; in the case of Belgium this proportion was 43%, but in Great Britain 96% of those travelling abroad had heard nothing about Hungary in the period preceding the interview. The lack of information is further demonstrated by the fact that one Brit in two did not know that Budapest is the capital of the country, one Brit in three cannot place Hungary on the map, and those who knew it was in Eastern Europe think of Hungary as part of the “Soviet block”.

Part of Hungary's image is that those living in Western Europe are generally aware that “something has changed” in the eastern European countries. As a result Hungary may be an interesting destination for many, and behind the lack of an increase in interest there lies the dominance of the “old” image. The **“eastern European” image** – which contains mostly negative elements, such as poverty, the underdeveloped state of the economy and the infrastructure, sadness and greyness – is still present in both the Italian and British markets.

Partly in line with the differing images, the proportion of those planning a journey to Hungary differs in each origin market. In Germany – our most important origin market – the highest proportion was 13% between 2002 and 2004, followed by Great Britain (11% between 2003 and 2004), France (10%), Italy (7.5% between 2002 and 2004), and Spain. In the case of Spain, it should be noted that the most attractive tour is Budapest-Vienna-Prague, which a total of 4.8% of the Spanish interviewed would choose as a first destination, but this proportion grows considerably for the second (6.1%) and third (9.5%) choice of journey.

Those that know Hungary, however, typically have very positive opinions about the country, because the visitors to Hungary are in many cases “pleasantly surprised”. In the case of Italy the proportion of those returning home from their trip to Hungary with experiences more positive than they expected was 32.4%, and the proportion of those satisfied with their journey was as high as 89%. The British who have been in Hungary (similarly to the Italians) also have pleasant experiences, and as a result 96% of them would recommend Hungary to their friends and acquaintances as a possible destination. In spite of the fact that those who have been to Hungary have a significantly more positive image of Hungary, from time to time there are negative elements here too, such as “greyness”, the low standard of life, and the historical past/communism.

In relation to the western European origin markets that know Hungary less well, the **Budapest-Vienna-Prague** triangle should also be mentioned, which is emphatically present on the Spanish and British markets as a round trip offer. Those who have been to Hungary have much more de-



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tailed knowledge, and amongst the elements of the image of Hungary feature, apart from Budapest, culture, music and architecture, the landscape, the river (Danube), the medicinal baths, the pleasant climate, the atmosphere and the good price/value ratio, as well as the attraction of eastern European countries.

In addition to the personal experiences and trips to Hungary, a significant role in the formation of Hungary's image is played by the events known as **Year of Hungarian Culture**, held in France in 2001, in Italy in 2002, and in Great Britain in 2003, organised by the Ministry for National Cultural Heritage²). The purpose of this series of events is to present Hungarian cultural values, and to provide information to potential visitors to the country. The cultural events, exhibitions and presentations on the cuisine provide a good opportunity to inform people about Hungary, to present the values of the country, and thus to form a positive image.

Experience shows that MAGY'art Year of Hungarian Culture organised in France in 2001 was extremely well coordinated and prepared, including many cultural events, exhibitions and presentations of the cuisine. As a result, according to French tourism experts, Hungary has clearly become a developing destination. French tourist search primarily for close, safe European destinations. Culture, history and cuisine feature highly amongst the motivating factors, and wellness and medicinal tourism are coming steadily into the foreground. The opinion in France of the things on offer to the tourist in Hungary is favourable, and following their return home visitors to our region are very positive about their experiences, which has a favourable affect on journeys to Hungary, and the change to be expected in the number of French tourists visiting Hungary.

The Year of Hungarian Culture in 2002 in Italy was the first event of its kind in Italy, the Italian public reacted positively too. Amongst the events a prominent place was taken by film, dance, contemporary and classical music, and folklore. The image of Hungary clearly changed for the better by the end of the events: those who had known Hungary before increased their knowledge, the events confirming their previous image, while those who knew less about Hungary expressed pleasant surprise. Thanks to the cultural programmes, it was primarily those dealing with or interested in culture who were able to deepen their knowledge.

To sum up, it can be stated that in the western European origin markets there is often no image of Hungary, or it contains many negative elements, such as the underdeveloped state of the economy and the infrastructure, transport, "greyness", unfriendly people and insularity, as a result of which Hungary is "grey" and thus less attractive. At the same time it is important to point out the

² Similar series of events will be held in the Netherlands, Russia and Lebanon in 2004, in Luxembourg and Berlin in 2005, in Finland in 2006 and in Prague in 2007.



positive experiences of tourists who have been here, and the positive elements of the image of the country which they have, which relate primarily to the **historical and cultural values and hospitality** of Hungary.

Of the **Eastern European countries**, research was carried out first in Poland in 2003, but the conclusions of the research can probably be generalised to the other countries of the region, and thus the image of Hungary within the region is presented on the basis of this research. The number of tourists travelling from the region to Hungary showed a significant drop at the beginning of the 1990's, in the years following the political changes, but by the middle of the decade this tendency had reversed. Although statistics do not show a continuous increase in the case of every source market, on the whole it can be concluded that the ex socialist countries are once more beginning to be attractive for the population of the countries in the region. Of central and eastern European countries, Poland has the greatest role in the turnover of incoming guests: in 2002 Poland accounted for 3.5% of the number of guest nights in public accommodation establishments, making it the seventh most important origin market.

As a result of the common historical past and relation of Hungary and the surrounding countries, many more people in these countries know Hungary better. Over the last few years there has been an improvement in the relationship with the ethnic groups of the central and eastern European region, and in relations with other peoples. It seems that western Europe has lost some of its former attraction, which was typical of the first years of transition.

In relation to the image the Poles have of Hungary, it is important to note that they consider Hungary to be a central European country, in contrast with the image of the “eastern block” held by those living in western European countries. From geographical, cultural and historical points of view, they consider the Czech Republic, Slovakia, Austria and Croatia to be similar to Hungary. This is supported by the fact that 7.6% of those planning trips abroad³ choose Hungary - after the great European Mediterranean countries like Italy, France, Greece and Spain – a similar proportion to the Czech Republic (10.3%), Austria (8.5%), and Slovakia (8.1%).

In relation to Hungary the Poles first of all mention Budapest (46.5%), followed by Lake Balaton (39.2%), Hungarian cuisine (39.8%), and wine culture/Tokaj (38.1%). The “csárdás” is also known to the Poles, and of the attractions mention should be made of the Danube and folk music. In relation to Hungarian cuisine, the Poles associate it with goulash and paprika.

The proportion of those in Poland – and in parallel with this, probably in the region – who do not know Hungary is much lower: although one fifth of the Poles interviewed during the re-



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search could not associate Hungary with anything, almost half of those who gave answers have a very detailed knowledge of the country, including more than five factors. It is also important to note that in the 30-50 age group there is a much more definite image of Hungary than in the case of those under 30, in other words, the percentage of those who know less about the tourist attraction is growing.

The knowledge of those Poles who have not yet been to Hungary seems very superficial. It is however important to point out that the (usually negative) associations with Hungary are related to history (the Austro-Hungarian Monarchy, socialism) and linguistic difficulties. (Apropos of language it is worth noting and drawing attention to the fact that the Hungarian language, and the Hungarians' shortcomings in foreign language skills is an important part of the image that foreigners form of us, and cannot be neglected). With the Poles Hungary was often referred to as "European" and "western", and Hungary is in a better position compared to the other post-communist countries. Furthermore, Hungary seems to be a friendly and hospitable place even for those who do not know it: a significant contrast to western European countries is that those who do not know Hungary do not have a negative image.

The Poles who have been to Hungary (14.9 % of those who travelled abroad between 1998 and 2002) made positive reports, having generally visited Budapest, whose atmosphere they compared to that of Prague. They also visited towns other than the capital, where they also had pleasant experiences. Compare to western Europe, the Poles had broader knowledge of both the regions/settlements and the tourist products.

An important element of the image of the country and how it is formed is the information available, and both the profession and the public at large, both those who have and have not been to Hungary have quite differing opinions on the quantity of this information. In the opinion of the public there is little general information available on Hungary, but those who have been to Hungary are satisfied with the range of information: behind this there is also the fact that those who have been to Hungary earlier receive information about a known country and known places, and link the information to their own travel experiences: in other words those who have been to Hungary are more "receptive" to news about Hungary.

To sum up, it can be concluded that of the elements of Hungary's image, our historical past and historical values, communism, poverty and a low standard of living are emphatically present. Within the rich historical past, in several countries (for example Italy and Poland) the Austro-Hungarian Monarchy forms an element of the image. From the point of view of society and the

³ Trips planned in the next three years.



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people, a positive element across the board is an image of hospitality and hospitable people, whereas a negative element is the Hungarian language, its difficulty, and the lack of security and cleanliness. Budapest is the best known of the country's attractions, followed by the Danube and Lake Balaton. With respect to the geographical location the eastern European image is stronger than the central European one. The image of Hungary is most uniform with respect to hospitality, landscape and nature, with fine landscape and natural values being recognised in every market. A decisive element of Hungary's image is culture and cultural values, and within this traditions, folk art, music and architecture. In contrast, the gastronomical elements of the image are not present in every country. Knowledge of Hungarian dishes in general, Hungarian wines, and goulash and paprika, is however present in several countries – especially amongst those who know Hungary. The greatest number of negative elements are related to what is on offer to the tourist, and infrastructure: related insufficient quality and quantity of services, programmes, and lodgings. The favourable price value ratio can be highlighted as a positive element.

Summing up the various elements of the image of the country, it can be concluded that Hungary has a rich and multifaceted culture, where many cultures have left their traditions, buildings and customs over the last thousand years. Many see the country as a meeting of East and West, ascribing to it a bridging role. The monuments and artistic monuments from almost every era which attract millions to Hungary are wonderfully complemented by the hospitality of the Hungarian people, their unique culture, traditions and customs. The “Pusztá-Piroska-Paprika” (plain, Red Riding Hood, paprika) trio is still important in the image of Hungary, but this is steadily being complemented with health tourism, cultural tourism, and other attractions and events.