



Hungarian National Tourist Office

Development of Spa and Wellness Tourism in Hungary; Business Results

Dr. Ákos NIKLAI

Chairman, Hungarian National Tourist Office
Past President of the Hotel Association of Hungary

Brussels, 6 June 2007



HUNGARY
Talent for entertaining

Hungarian National Tourist Office

General information about Hungary

**In the heart of Europe for over
1100 years**

**Member of the European Union
since May 2004**

Territory: 93,000 km²

Population: 10 million

**15th most popular tourist
destination in the world**

Central Europe



Tourism in Hungary – Facts & figures 2006

41 million arrivals at frontiers

7 million arrivals at commercial accommodation of which 5 million in hotels

19 million guest nights at commercial accommodation of which 13.4 million at hotels

46.6% of arrivals, and 51.6% of guest nights at commercial accommodation generated by incoming tourism

228 billion HUF revenue at commercial accommodation (~ 912 million EUR)

3.6 billion EUR international tourism revenue

The most popular destinations are

Budapest and the Central Danube Region (35.0% of guest nights)

Lake Balaton (22.5% of guest nights)



Hungarian National Tourist Office

Hungarian National Tourist Office

- **Tourism, sport and regional development are supervised by the Ministry of Municipalities and Regional Development since summer 2006, ensuring the synergy of these issues.**
- **HNTO's main goal is to increase the number of guests, guest nights and tourism receipts.**
- **Strong emphasis on the cooperation with the tourism trade and strategic partners.**

Hungary's priority source markets

- **Main source markets:** Germany, Great-Britain, Austria, Italy, USA
- **Most promising markets:** Northern Europe, France, Czech Republic, Slovakia, Poland, Romania, Russia
- **Emerging source markets:** Holland & Belgium, Spain, Japan, Switzerland, Israel, Ukraine, China

Focuses of the Marketing Activity

Besides the image building of Hungary as a tourist destination, the marketing communication is focused on four main products abroad:

- **Budapest**
- **Lake Balaton**
- **Spa & Wellness**
- **MICE**

Further Major Attractions

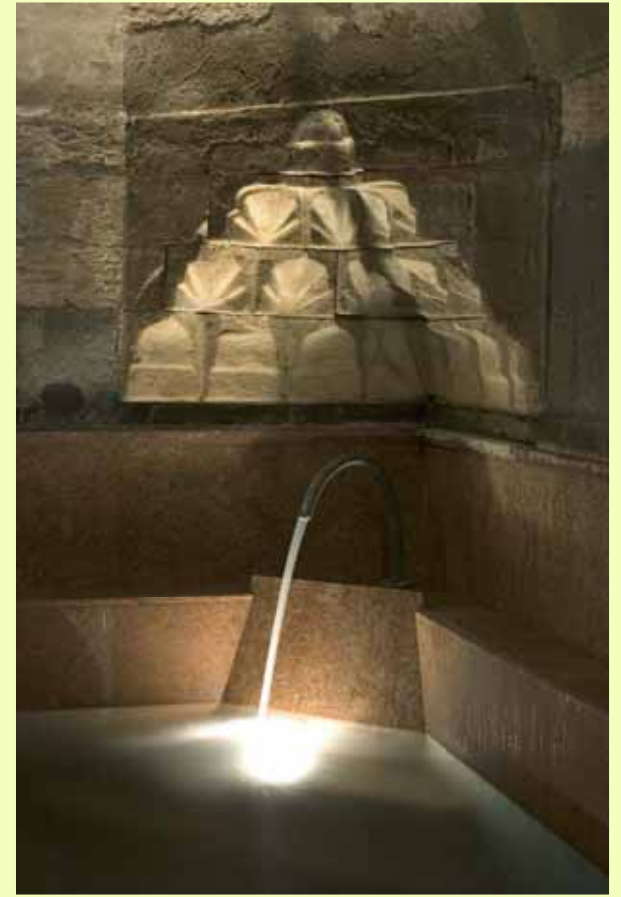
- **Food and Wine**
- **Sports and Active Holiday**
- **Culture**



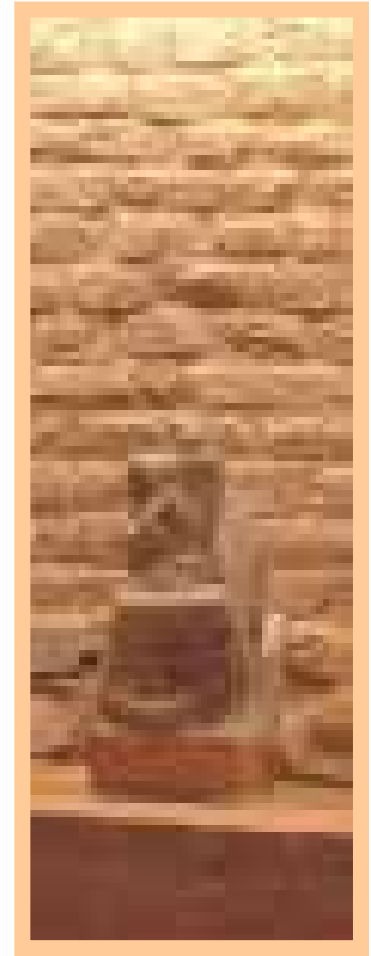
SPA AND WELLNESS



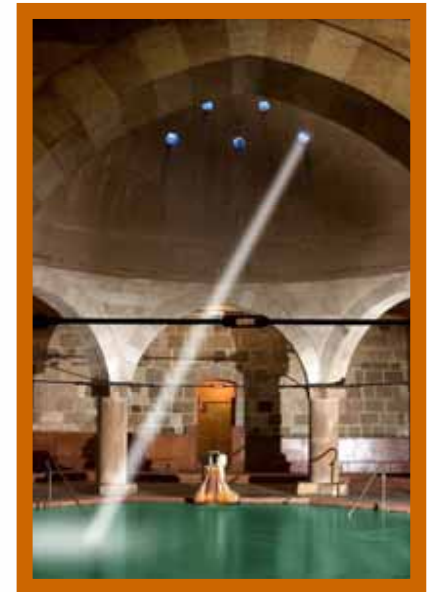
History of Spas – The Celts



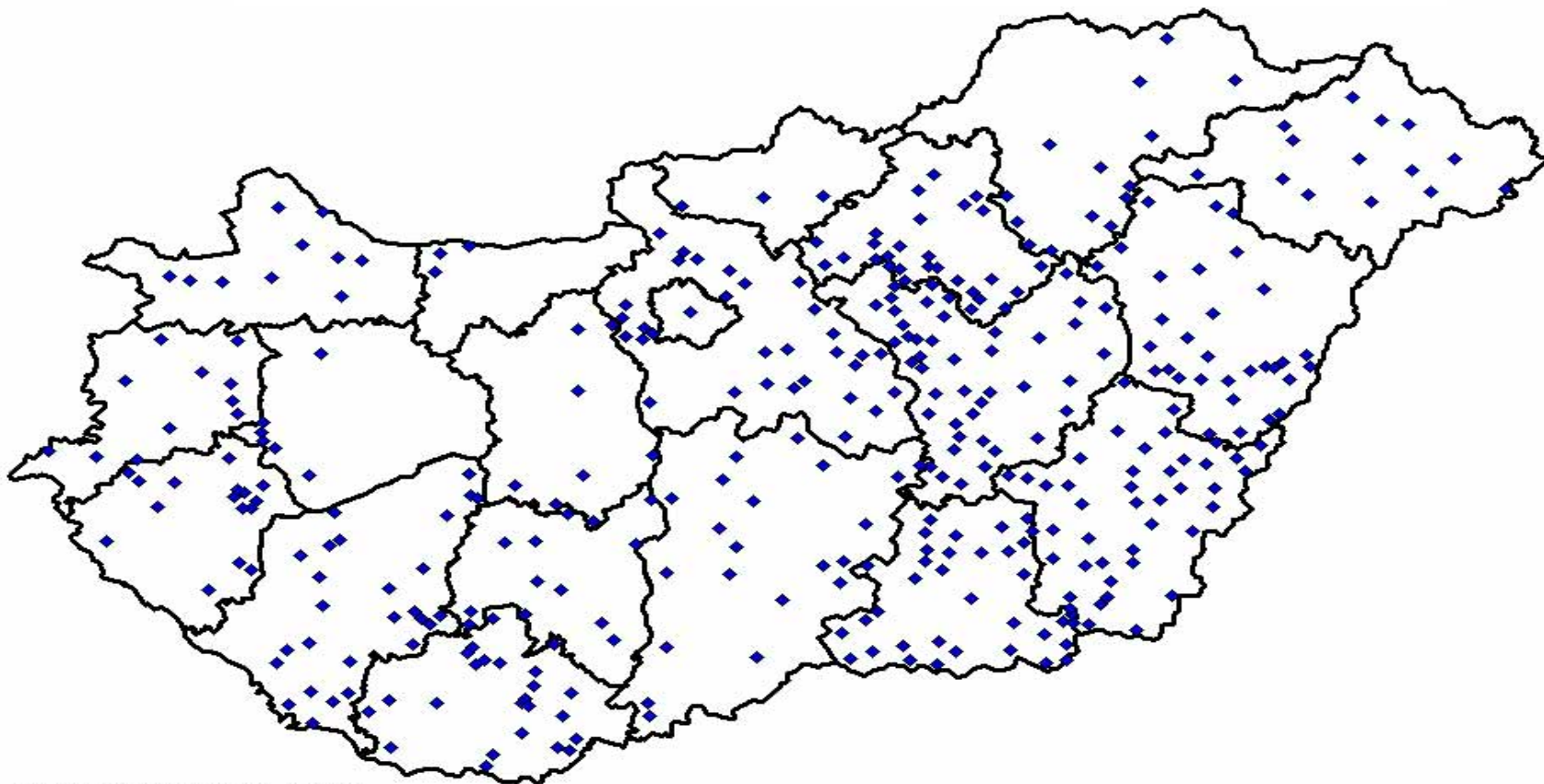
History of Spas – The Roman Empire



History of Spas – Turkish Baths



The result of the oil research in the 20th century: *1300 thermal springs*



Forrás: Vituki Rt. 1994.

History of Spas – In Our Days



Hungary as a health tourism destination

Bathing traditions going back to more than thousand years

Health tourism services form an important element of Hungary's image as a tourist destination

Hungary boasts the world's 5th largest supply of thermal waters

Besides medical treatments, wellness tourism is becoming increasingly popular

Unique natural resources, high quality services coupled with the favourable value for money ratio

Visit to a thermal spa is one of the favourite activities during a stay in Hungary

Our offer - Natural resources

1,289 hot springs

38 facilities with qualified medical baths

5 therapeutic caves

13 health resorts

81 recognized sources of mineral water

315 springs of medicinal water

4 deposits of therapeutic mud

1 mofette

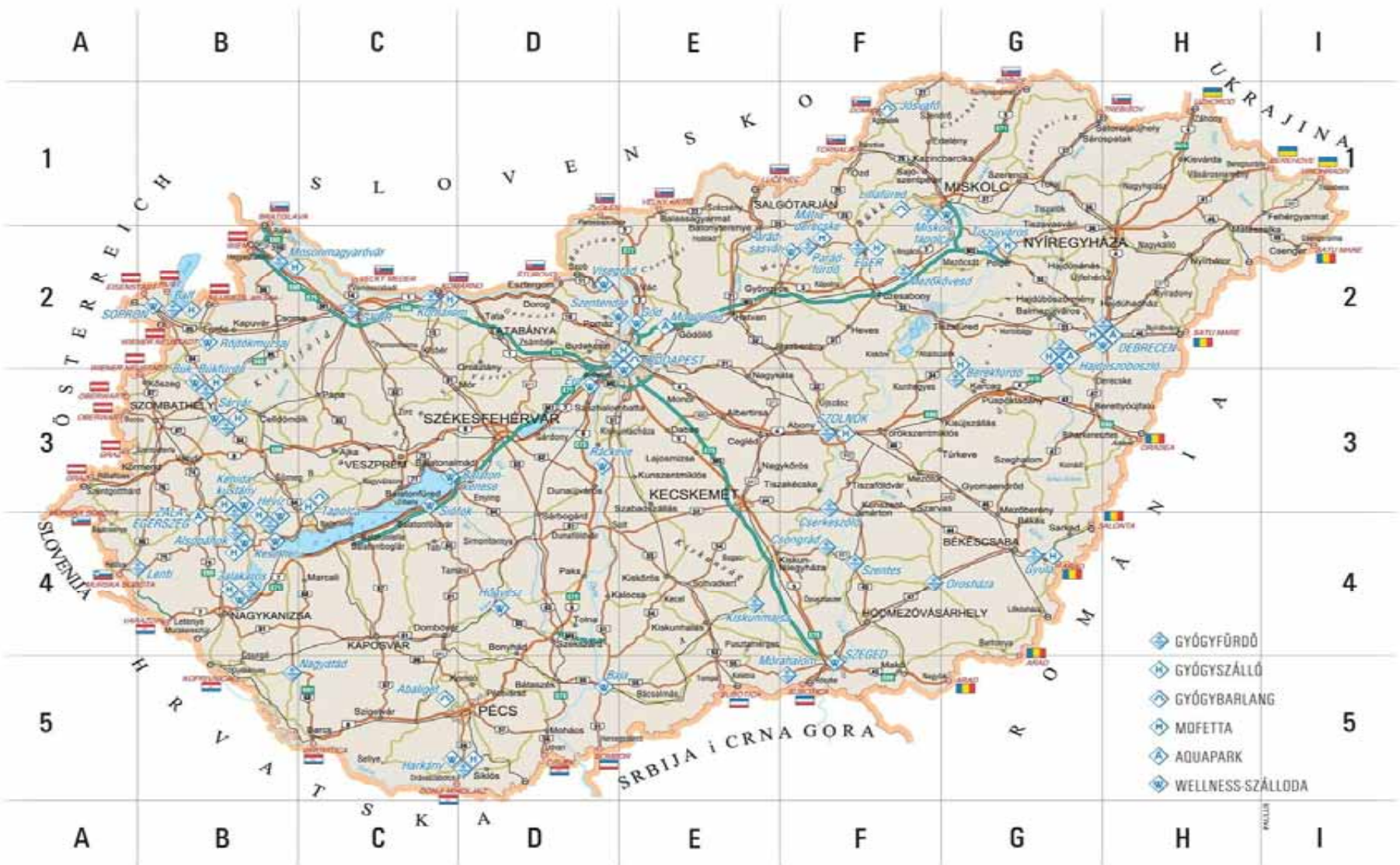
Our offer - Manmade supply

Hotels: 56 spa hotels with 14,043 bed-places &
55 wellness hotels with 8805 bed-places

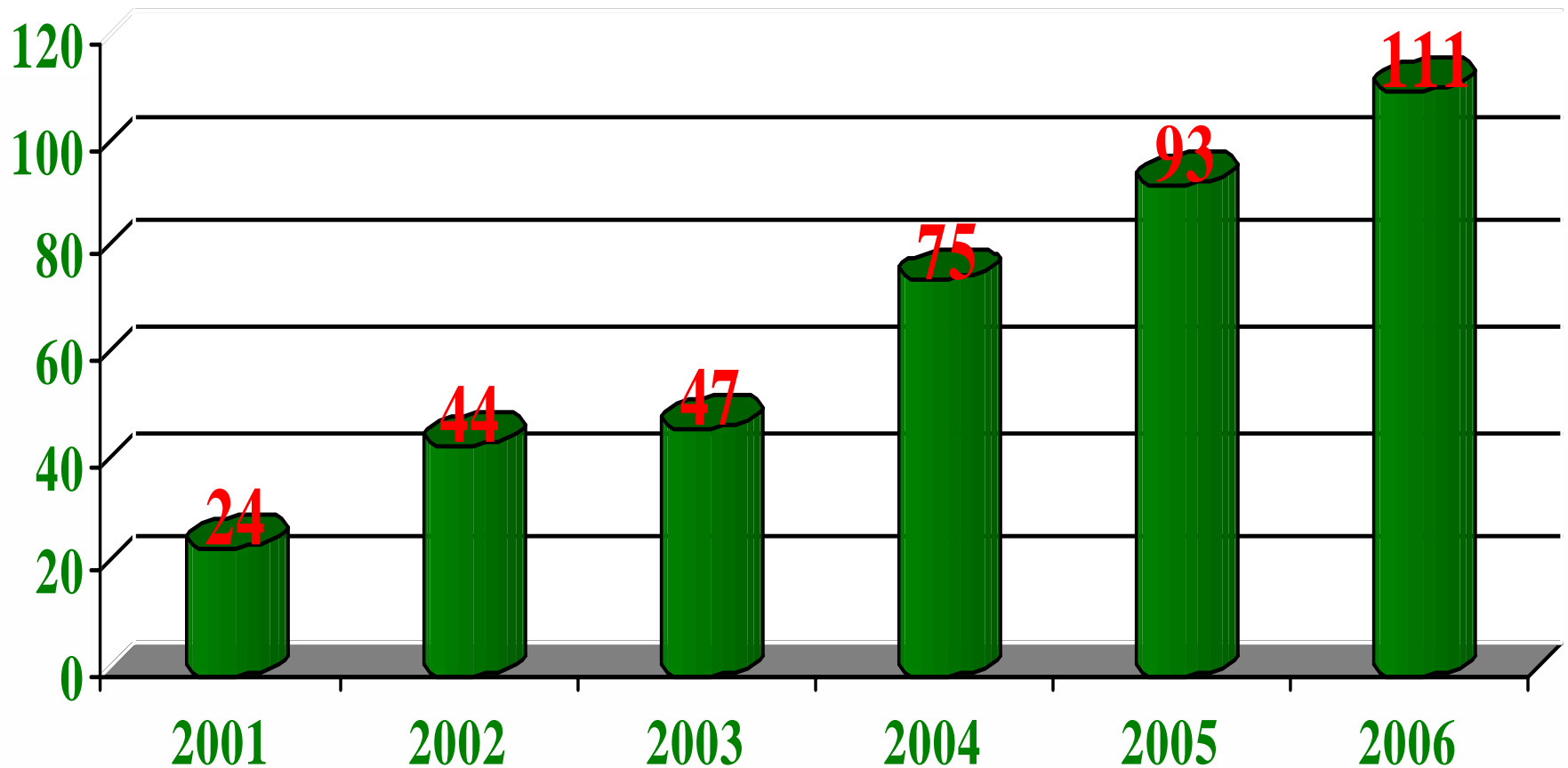
Spa and wellness treatments: Acupuncture, acupressure, Herbal bath, Bach therapy, Salt cave/salt room, Magnetic therapy, Ultrasound treatment, Oxygen therapy, Mud pack, Ayurveda therapy, Phototherapy, Sound therapy, Chiropractor, Spinal exercise, Massage, Kneipp therapy, Thalasso therapy

Beauty treatments: Aromatherapy, Infra-treatment, Sea salt pack, Reflex therapy, Algae pack, Cleopatra bath

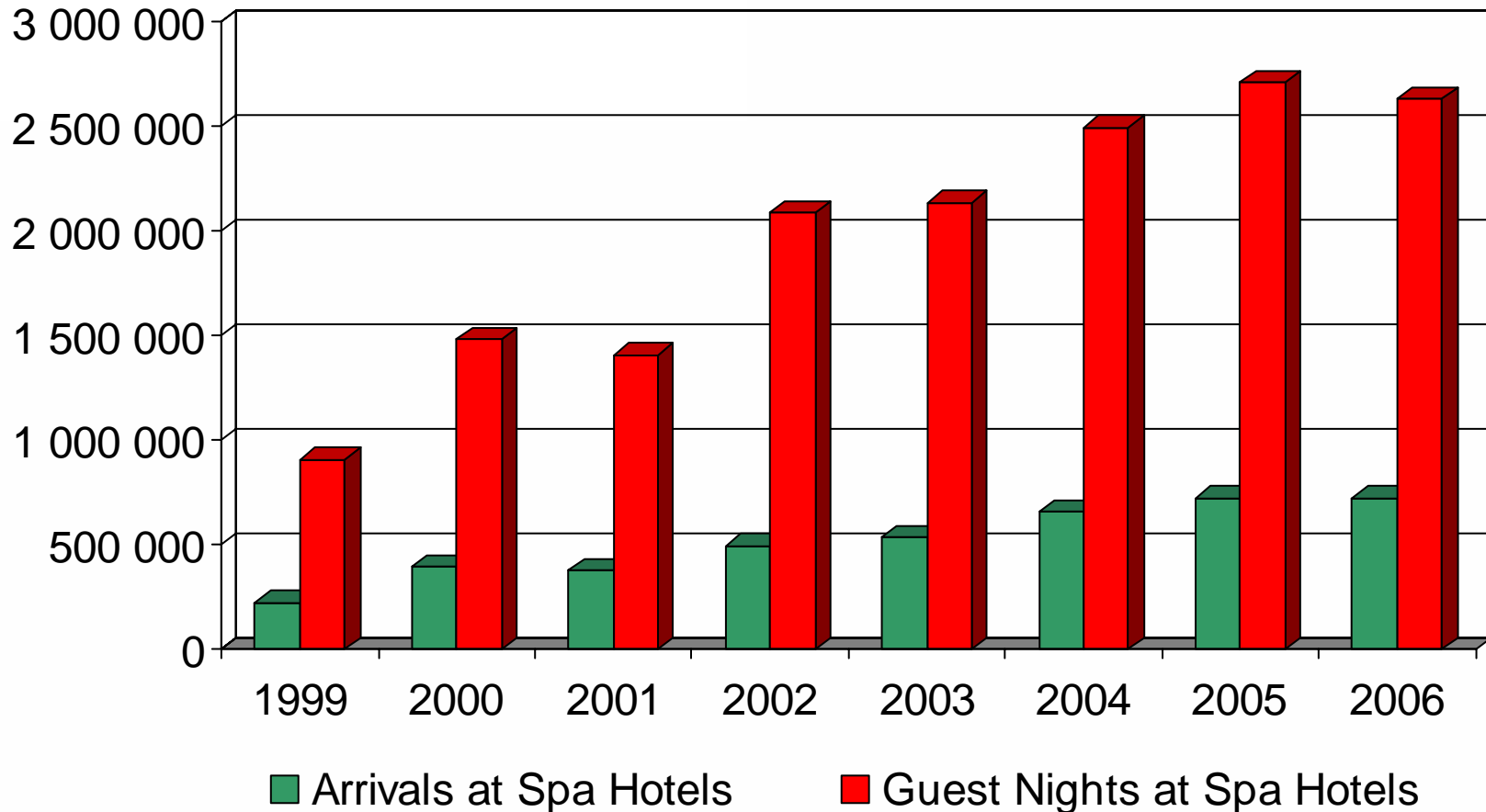
Spa and Wellness Facilities



Number of Spa and Wellness Hotels



Increasing demand for health tourism services



The demand side

	Spa Hotels			Wellness Hotels		
	1999	2006	2006/1999	2004	2006	2006/2004
Domestic						
Arrivals	68,275	402,565	+489.6%	115,967	375,344	+223.7%
Guest Nights	190,365	1,236,112	+549.3%	241,277	834,487	+245.9%
Av. Length of Stay	2.8	3.1	+10.1%	2.1	2.2	+6.9%
International						
Arrivals	153,882	320,244	+108.1%	39,429	106,107	+169.1%
Guest Nights	718,097	1,398,722	+94.8%	171,574	366,910	+113.8%
Av. Length of Stay	4.7	4.4	-6.4%	4.4	3.5	-20.5%
Total						
Arrivals	222,157	722,809	+225.4%	155,396	481,451	+209.8%
Guest Nights	908,462	2,634,834	+190.0%	412,851	1,201,397	+191.0%
Av. Length of Stay	4.1	3.6	-10.9%	2.7	2.5	-6.1%

Facts and Figures

Spa and wellness hotels show the most impressive growth according to guest nights among all hotel categories.

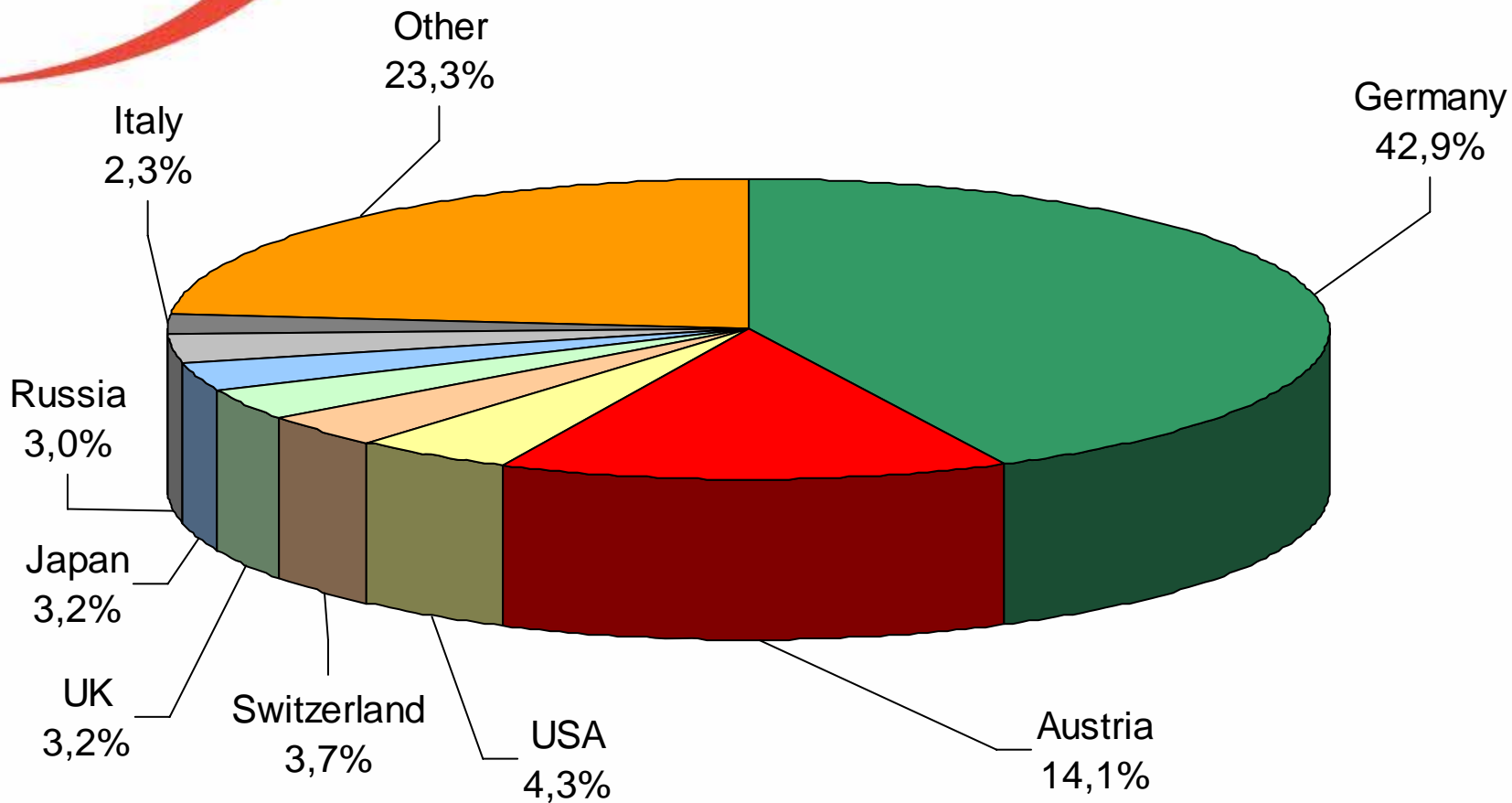
77,7% of the spa and wellness hotels foreign guest nights realised by EU visitors.



HUNGARY
Talent for entertaining

Hungarian National Tourist Office

Main source markets of spa hotels



Source: HCSO

Advantages of health tourism

- ✓ High spending
- ✓ High average length of stay
- ✓ Wide variety of services
- ✓ Little seasonality
- ✓ Demand is guaranteed by aging societies
- ✓ High rate of return visit
- ✓ Requires trained staff



Hungarian National Tourist Office

Spa experience in Hungary – Now and in the future...

Budapest, Gellért Spa







Hungarian National Tourist Office

Budapest, Széchenyi Spa





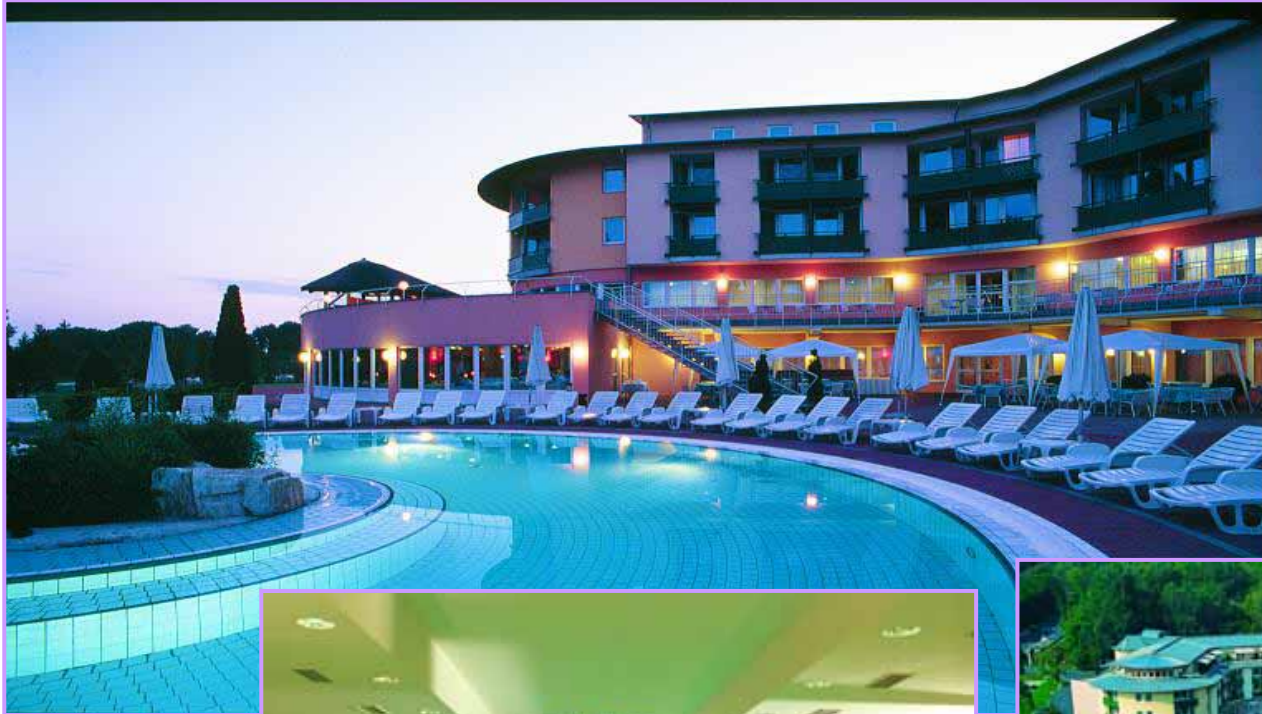
Röjtökmuzsaj, Szidónia Castle Hotel



Hévíz, NaturMed Hotel Carbona



Hévíz, Rogner Hotel & Spa Lotus Therme



Hajdúszoboszló Spa & Hotel Aqua-Sol





HUNGARY
Talent for entertaining

Hungarian National Tourist Office

Spa Development in Hungary

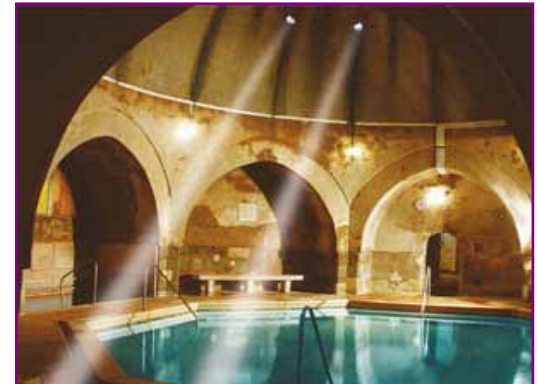
2001 – 2005

- **138 investment projects**
- **147 million Euro state support**
- **452 million Euro investment value**



Development in the future

- **National Tourism Development Strategy
Spa Tourism Product Development**
- **Reconstruction of the National monument spas:**
 - **2004-2006 support budget: 12 million Euro**
 - **in 2007 the project continues**



Some major projects

**Aquaworld Water Empire
and Ramada Plaza 5* Hotel
2008**

**Europe's second biggest
water sports and wellness
complex in Budapest
64 M Euros**



Some major projects

- **Kempinski Hotel & Spa Rác – complete reconstruction and a 5* hotel in the heart of Budapest – 19 M Euros**
- **Hilton Hotel Visegrád – 5* hotel with conference, swimming and wellness facilities (20 km-s from North of Budapest)**
- **Thermál Hotel Spirit Sárvár - 5* thermal hotel Siklós health, wellness and sports development project, 5 * hotel, healing, wellness and sports facilities – 18 M Euros**

Some major projects

Egerszalók – The European „Pamukkale” , healing and relaxation in the valley of tranquility – complex tourism development, 5* hotel, apartment houses, conference, sports, wellness, health treatment facilities – 30 M Euros





Hungarian National Tourist Office

Thank you very much for your kind attention!

www.hungary.com