

Viola Horváth

Introduction of Hungarian wellness and medical tourism

with the Nordic Countries as main target group

Thesis

Spring 2013

Business School

Double Degree programme

International business



SEINÄJOKI UNIVERSITY OF APPLIED SCIENCES

Thesis abstract

Faculty: Business School
Degree programme: Double Degree
Specialisation: International Business

Author/s: Viola Horváth

Title of thesis: Introduction of Hungarian wellness and medical tourism with the Nordic Countries as main target group

Supervisor(s): Miia Koski

Year: 2013 Number of pages: 64 Number of appendices: 0

Hungary has the fifth richest medical and thermal water resources in the world and it is famous for traditional, natural healing methods and unique treatments.

This thesis is based on the above mentioned facts and my experience in the interest in Finland in the Hungarian wellness opportunities, which was confirmed by the positive feedback from the successful presentation of Hungary on travel fairs, roadshows and workshops in Scandinavia and the recent steps taken for the opening of a Northern market.

The information in the theoretical framework of thesis is mainly from Internet sources because of the lack of material about the Hungarian baths in Finland. The management of the baths in Hungary was contacted to acquire the information and descriptions of the baths directly from there.

The aim of this study is to provide an overview of the Hungarian wellness and medical tourism sector and present the Nordic countries as a potential main sending market. The author's desire is to highlight the further opportunities for the Pannon Thermal Cluster, contributing to its operations.

Keywords: health tourism, Hungary

TABLE OF CONTENTS

THESIS ABSTRACT	2
TABLE OF CONTENTS	3
ABBREVIATIONS	5
1 INTRODUCTION	7
2 IN GENERAL ABOUT THERMAL AND HEALTH TOURISM	10
2.1 The system of health tourism	10
2.2 Spa.....	12
3 THE HOME OF THERMAL AND MINERAL WATER	14
3.1 Thermal water occurrences in Europe	14
3.2 Types of water.....	15
3.3 Brief history	17
3.4 Treatments.....	18
3.5 Clusters in general	19
3.6 Pannon Thermal Cluster	20
3.6.1 Organizational structure	21
3.6.2 Services of Panterm.....	21
3.6.3 SWOT	22
4 THE MOST VISITED BATHS IN THE REGION	26
4.1 Hévíz.....	27
4.1.1 Medical treatments.....	28
4.2 Bük.....	31
4.2.1 Service departments	32
4.3 Sárvár	37
5 THE NORTHERN MARKET.....	42
5.1 Northern-Europe	43
5.1.1 Analysis of the countries as sending markets	44
5.2 Nordic model.....	52
5.3 Activities aiming the target market	54
5.3.1 New flights	54

5.3.2 Marketing strategy	55
6 CONCLUSION	57

Abbreviations

Pantherm	Pannon Thermal Cluster
HCSO	Hungarian Central Statistical Office
Thermal water	all the naturally occurring water with higher temperature than the annual average temperature of the earth's surface at the location of the occurring. In Hungary the water called thermal water above the temperature of 30 °C. (Gáspár, 2013)
Mineral water	all the naturally occurring water with higher mineral content than 1000 mg/l. In the case of 500-1000 mg/l mineral content, there is more than a specified amount of one biologically active material (Jogtár, 2013)
Health resort	<p>A settlement can be pronounced as a health resort according to the National Public Health and Medical Officer Service if the following conditions are satisfied: (Jogtár, 2013)</p> <ul style="list-style-type: none"> - The natural medical factor recognised by the decree is given (for example medical water) - The medical institutional facilities for utilizing the natural factor are provided (for example medical bath or hotel) - The environmental conditions ensure the undisturbance of the healing and the peacefulness of the patients - The infrastructure for the recreation is built
Medical water	mineral water, which has therapeutic effects, demonstrated by medical experiments (Jogtár, 2013)

TABLES AND FIGURES

FIGURE 1: The system of health tourism	11
FIGURE 2: Thermal water occurrences in Europe (Thermal and medical center) 14	
FIGURE 3: Pannon Thermal Cluster's location in Hungary (Edited, Original source of map: www.celluloz.hu)	20
FIGURE 4: The population pyramid of Denmark (Indexmundi, 2012).....	48
FIGURE 5: The population pyramid of Finland (Indexmundi, 2012).....	49
FIGURE 6: The population pyramid of Norway (Indexmundi, 2012)	50
FIGURE 7: The population pyramid of Sweden (Indexmundi, 2012)	51
TABLE 1: Most visited Hungarian cities * () Number of guests nights at commercial accommodation units (000s). Source: HCSO	26
TABLE 2: Arrivals and guest nights at hotels (HCSO, 2013)	42
TABLE 3: Characteristics of Denmark	44
TABLE 4: Characteristics of Finland	45
TABLE 5: Characteristics of Norway	46
TABLE 6: Characteristics of Sweden	46

1 INTRODUCTION

Health tourism plays an important role all over the world, and the tendency shows growing. According to WHO`s forecasts tourism and health industry together will be determinative economic field by 2022 (Hungarian Tourism Plc., 2013).

In developed countries the age of retirement is becoming longer. People`s health consciousness is increasing, the need for improving the quality of life, the prevention of illnesses is getting more relevant, thanks to the growing life expectancy. A new life style is spreading, which concentrates on wellbeing and fitness.

Hungary plays an important role in health tourism, according to the international ranks, Budapest is on the 2. and Hévíz is on the 13. place (Best Spa Vacations, 2013). Almost one third of the guest nights at commercial accommodations are spent in wellness hotels in Hungary. If we take into consideration only the hotels, more than 47% out of the guest nights are registered in wellness hotels (Hungarian Tourism Plc., 2013).

The main reason can be derived from Hungary`s favorable geothermal situation and the outstanding thermal water resources. Hungary has the fifth richest medical and thermal water resources in the world, - after Japan, Iceland, Italy and France - including 147 types of qualified medical water. Hungary has wide-known, traditional healing methods and unique treatments based on these natural sources.

Although the statistics show positive results and most of the essential factors are given, the facilities build on the utilization of the thermal sources are developing and getting more common in Hungary, it is still in the beginning section and there are relevant unutilized opportunities. Since Hungary is a large thermal power in Europe, could play much more important role at global levels of tourism.

Health tourism is the key driver of health industry. Health industry is connected to almost every field of economy and has innovative characteristics, which have to be considered.

The importance of the tourism based on medicinal services is growing, the medicinal tourism in Hungary is a dynamic field. Hungary has well-qualified specialists, and good references in this area, and the appropriate knowledge in medicine to reach better position in health tourism in Europe.

Through the development of health tourism the GDP can be increased easily in Hungary. Good results can be achieved with low investment, due to the country's geological position.

Nowadays the value of the human capital is re-evaluated and health tourism has a high human resource need, which has positive affect for the employment rates. The unemployment rate is high in Hungary, was 10,9% in 2012 (Eurostat, 2013), therefore it is a suitable way to decrease it.

The emphasizing of health tourism has also beneficial effect on the health condition of the people in Hungary, which is not ignorable, since it is one of the most important problems of the society.

In conclusion, the whole performance of the economy of Hungary could be increased, with paying higher attention of the health tourism, meaning the better and more complex utilization of Hungary's opportunities.

Developing health tourism in Hungary depends on the effective demand. According to the statistics the inbound tourism means already considerable part, and there are still unutilized opportunities in foreign markets.

Since the effective demand is a key factor in developing, and in Hungary it mostly means the senior age visitors especially from welfare societies, opening to the

Northern market is a strategic advantage with taking into consideration the Nordic model's characteristics.

The purpose of my thesis is to introduce Hungary as a health tourism destination, to analyze the Northern countries as potential sending markets and in overall, to increase the awareness of the target group.

The working area was narrowed for a certain part of Hungary, where the Pannon Thermal Cluster is operating. The study presents the importance of this region, and the three most potential baths, located in West Hungary. Therefore to highlight the further opportunities for the Pannon Thermal Cluster, contributing to its operations by getting the attention of wider audience in Finland is also among the targets of the study.

The implementation of the work sometimes was a bit challenging. As for the theoretical framework, difficulties have occurred in acquiring the appropriate information regarding the geographical distance between Finland and Hungary. The education system including the graduation process is different in Finland and in Hungary. Since I am taking part in a Double Degree Programme I have to meet the requirements for both universities.

2 IN GENERAL ABOUT THERMAL AND HEALTH TOURISM

Health tourism is one of the oldest kind of tourism. Already ancient civilizations practiced several therapies out of those provided today is spas. Water treatments were introduced by Greeks to the Roman Empire, the first spas in Europe were built by the Romans and Turkish baths were built in Ottoman Empire. A long history of medical tourism is connected especially to Central and Eastern Europe, where significant natural healing assets can be found, such as medical thermal and mineral waters, special muds and caves, mountains and climate.

Nowadays the leisure based wellness tourism is spreading, due to the growing needs for natural healing methods in recent years. The definitions of health is changing, from a passive approach to an active type, people have new lifestyle, which is more concentrated on wellbeing.

The widely accepted definition of health, stated by World Health Organization (WHO, 1948) meaning “health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity” (Smith, M., Macleod N., and Robertson H. M., 2010).

Concluding, health does not mean only not being ill. The tourists, who are well and do not need medical treatment, also take part in health tourism, specifically in wellness tourism. Health tourism involves also medical tourism.

2.1 The system of healthtourism

Health tourism is an overarching category,all the travelling in connection with health included.The visitors' main motivation in health tourism is improving and preservation the health condition, prevention of illness. We can make a distinction between wellness and medical tourism.

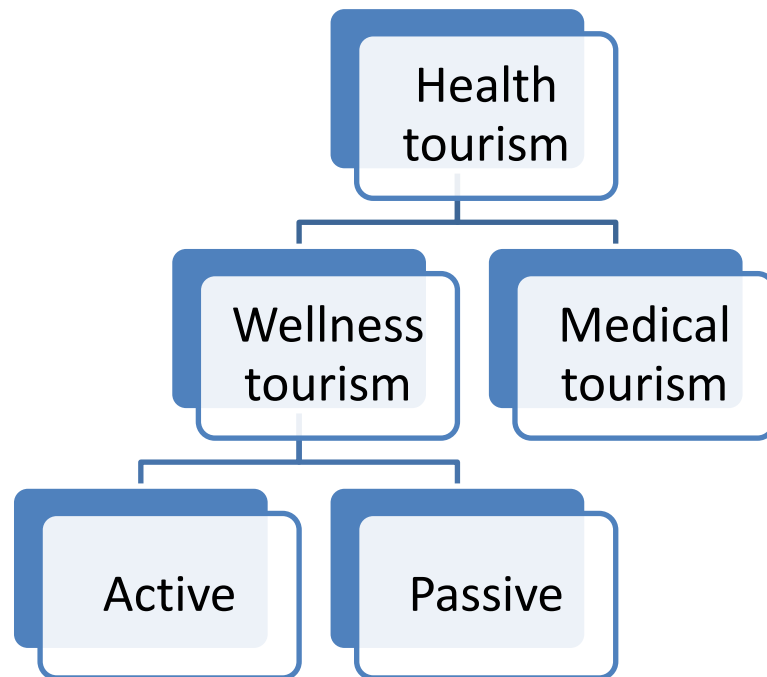


FIGURE 1: The system of health tourism

Wellness tourism referring the word, wellness, comes from well-being and wholeness. The main target of wellness tourism is wellness, which means the good quality or state of being healthy both in body and mind. It is rather connected to the change of lifestyle not to the healing of illnesses. All the services included, which purpose is the prevention of diseases, good physical and mental condition. The definition of wellness is based on four principles:

- systematic but not strainful exercising
- healthy nutrition based on scientific results
- improving the psychological condition
- environment consciousness (Hungarian Tourism Plc., 2002).

Wellness tourism contains leisure, recreation and holistic activities, and all the travels, where the tourist is focused on improving health. There are active and passive activities distinguished. Fitness tourism is a part of active tourism. Beauty programs belong to passive activities.

Medical tourism means, receiving medical treatments at the places where the health services provided, to heal diseases by staying for a certain minimum time (Hungarian Tourism Plc., 2002). Usually it is based on natural health factors (for example thermal water). Sometimes the guests take the services because of medical prescription. It includes surgery and therapeutic treatments and services when the patient treated for a specific medical condition.

Contrasting the two concepts, medical tourism tends to deal with physical conditions and diseases, while wellness is supposed to create harmony in mental, physical and biological health.

Nowadays the visitors` interest is increasing for leisure based wellness tourism, balancing body and spirit, many spa and hotel offer more complex services, including the whole range of health tourism activities and treatments.

2.2 Spa

Latin originated phrase “spa”, which is an acronym from “sanus per aqua” meaning health through water (Boronkay, 2005). Spa may also originate from the Latin word “spagere” (to scatter, sprinkle, moisten). It has the most complex meaning, contains all the facilities, which provide various services for physical or mental wellbeing. Both the above mentioned wellness and medical tourism included.

The term is also derived from the name of the town of Spa in Belgium, whose name is known back to Roman times, when the location was called *Aquae Spadanae* (A van Tubergen, 2001).

The meaning of spa differs from country to country. In Northern-Europe - in Finland or Iceland it means a bath with warm water. In Middle-Europe it is mainly connected to thermal water. In the USA or Asia, any kind of facilities can be called as spa, what provide services, cause physical and mental freshness. There is one

relevant characteristic for all concepts, to satisfy all kind of needs with the purpose of keeping the whole body and soul in health and harmony.

The types of spa according to the International Spa Association:

- Club Spa: provide mainly fitness services
- Day Spa: beauty-, fitness and wellness programs are provided without taking accommodation
- Spa Hotel: all inclusive programs for the balance of body and soul, including accommodation
- Holistic Spa: provides alternative treatments and meal
- Medical Spa: traditional and additional services for prevention and healing of illnesses, health care institutions can belong to that facilities
- Bath: provides hydrotherapy treatments, based on naturally located mineral-, thermal-, medical- or sea water
- Resort Spa: usually situated far from the civilization, in a beautiful natural area, providing all inclusive supply
- Sport Spa: provides special sport programmes above the spa services
- Structured Spa: strictly regulated facility, allows to its guests to achieve a certain aim (such as losing weight) (Hungarian Tourism Plc., 2002)

In the traditional approach spa is exactly the medical baths, just like the baths in Hungary, where the therapeutic effect of the water is used to reduce and remove the pain of the visitors. At the same time the approach of the health conscientiousness is spreading, the wellness orientation is getting more intensive.

3 THE HOME OF THERMAL AND MINERAL WATER

3.1 Thermal water occurrences in Europe

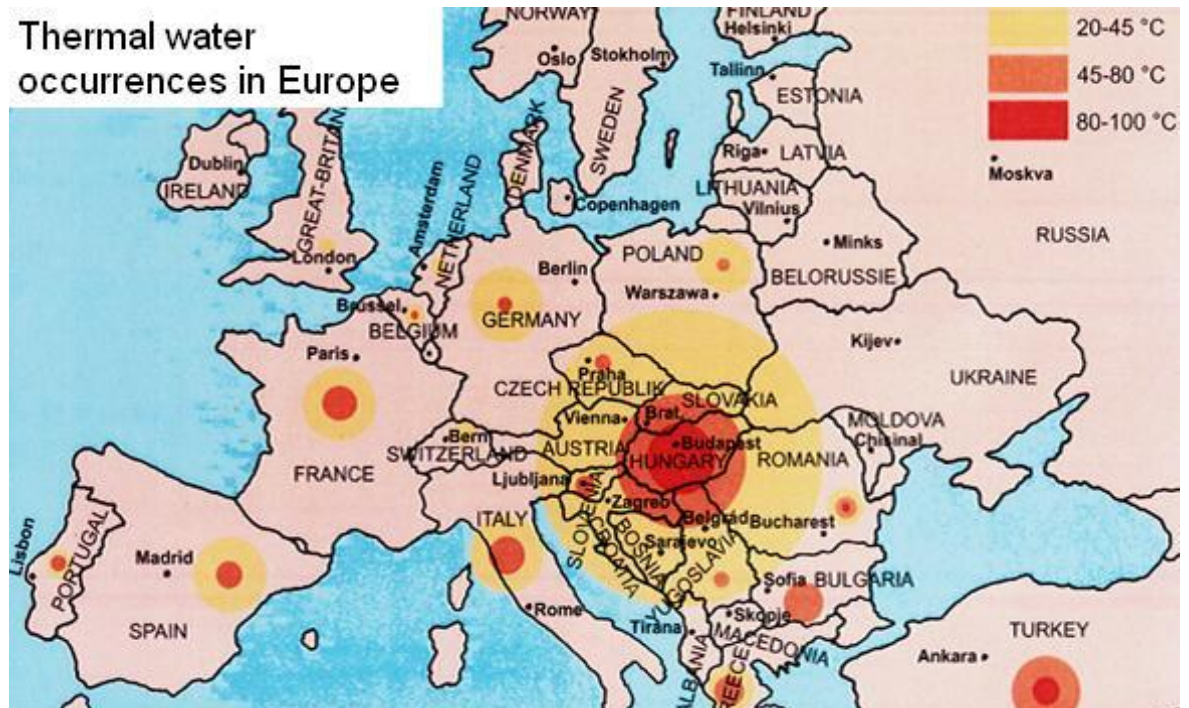


FIGURE 2: Thermal water occurrences in Europe (Thermal and medical center)

As it is visible from the map, Hungary, in the Carpathian basin is in favourable situation as for geothermal characteristics. It is unique, it has an unparalleled supply of healing, thermal and mineral water springs beneath almost the entire country.

Currently there are about 1300 places where thermal water occurs in Hungary, which means, that on the 70% of the country's territory can be found natural water, which temperature is above +30°C. Hungary has the fifth richest medical and thermal water resources in the world, - after Japan, Iceland, Italy and France- including 147 types of qualified medical water. The reason for these facts is derived

from the special geological characteristics of the Carpathian basin. The Earth's crust is 10 kilometers thinner than the world average, it means 23-27 kilometer distance, therefore the hot magma is closer to the surface. The geothermal gradient is 20 meter average in Hungary, at certain places only 15 meter, in comparison to the European 33 meter average. This indicator shows how many meters need for one Celsius grade growing of the temperature while getting closer to the center of the Earth. In the Carpathian basin, the temperature grows 5°C per 100 meter. In consequence thermal water could be gained easier than other places in Europe. As the saying goes, if somebody drills a bit deeper, accidentally find thermal water. The 70% of the region is aquifer area. There are two types of stone from which thermal water can be gained, karst carbonate layer and porous layer. The Turkish and Roman baths of Budapest belong to the karst carbonate layer water. All the other baths in Hungary have the water from the porous layer, the water coming from there, can reach the temperature of 90°C. The abundant quantity of the sources is also a significant factor, more than 300 000 cubic meter thermal water emerge to the surface daily (Magyar fürdő történet, 2013).

3.2 Types of water

In Hungary there are three types of water can be find. The first is thermal water, which is the water with the temperature above 30°C. The second is mineral water, which has minimum 1000 mg/l mineral content. In this group there are cold and warm mineral water differentiated. The third type is the medical water, which therapeutic effects are proved with medical experiments. The medical water according to the utilization can be internal (drinking cure and inhalation) and external (bath water) used.

The mineral waters in Hungary can be grouped on the basis of composition into the following types.

- The water which has more than 1000 mg/l CO₂ content called fizzy water (for example Balatonfüred fizzy water).

- The alkaline hydrogen carbonate (limy) water, are used for healing rheumatic diseases.
- The calcium-magnesium hydrogen carbonate water has also beneficial effects on rheumatic illnesses.
- The chloride (salted) water is used for inflammatory diseases (gynaecological problems, for example water of Pará)
- The sulphate(bitter) water is suitable for drinking cure (Hunyadi János water, Salvus water)
- The ferruginous water is the best for anemia in the form of drinking cure.
- The sulphurous water has disinfectant effect, recommended for dermatological problems (for example the water of Harkány bath)
- The iodine bromide water has relaxation effect, used against stress
- The fluoride water, used for the protection of teeth
- The radioactive water motivates the cells (Nemeth, 2013).

The medical waters effects according to the mechanism of can be physical (temperature, consistency, buoyancy, hydrostatic pressure) and chemical (the internal and external effect of the minerals dissolved in the water).

The above mentioned water types are used for the treatment in the following cases.

- Rheumatology diseases
- Rehabilitation after surgeries
- Gynaecological problems
- Cardiology problems
- Gastrointestinal problems
- Respiratory illnesses
- “Manager” illnesses (stress, exhaustion)

3.3 Brief history

Hungary's bath culture takes back to thousands of years. The beneficial effects of warm, high mineral content waters on the human body are known since the ancient times. Baths have played an important role in European culture. The history of the Hungarian bath culture can be derived into three main parts.

The first is connected to the ancient Romans, who already had a highly developed bath culture, particularly in the Pannonia-province, which is the western part of Hungary today. They built warm water baths which were essential assets not only of hygiene, but cultural life and entertainment. 11 baths were discovered by archaeologists in the former Roman settlement of Aquincum, near to Budapest. In these baths beside the sanitation there were several services available such as frigidarium, which is a cold pool bath. It was used after caldarium and tepidarium, which are hot, steamy rooms. Different types of massage and training room opportunities were also included.

Christians also continued the tradition; monks built monasteries and hospitals in the vicinity of mineral water springs from the 6th century.

When the Hungarians arrived to the Carpathian-basin in the 9th century settled down near waters and springs. Hungarian thermal baths became well-known and popular mainly in the Middle Ages.

The second important age was the 150 years Turkish occupation, when the bath-culture still remained popular in Hungary. The Turks built baths in Hungary, which not only provided a place for leisure and relaxation, but the baths were also an important venue for their social life. The baths of Budapest and Eger originate from this age. There are two special Turkish types of baths: Ilidza and Hamam. Ilidza was built directly on the occurring of the natural sources of water, with one central pool surrounded with more, smaller pools. The characteristic of Ilidza is the continuously circulating water. Hamam is a hot, steamy room with sitting places inside.

The third part is after the Turks, the last decades of the 18th century, Hungarian bath culture started to evolve again. Hungary's mineral waters were first charted at the beginning of the 19th century.

In 1876 a Public Health Law was declared for the regulation of the baths. In 1896 the number of the baths in Hungary was 286. The developments in transport, building of train networks helped the baths availability. The scientific literature was created in this age. The Rheumatism and Bath Institution was founded in 1934. In 1937 the International Medical Bath Congress was held in Budapest, where the participants confirmed that Hungary is the bath superpower of Europe. The opening of the Széchenyi Thermal Bath, the largest bath complex of Europe, in 1913 was a milestone in the bath culture development (Peralta, M. A. 2004).

Today, the total number of medical, thermal and beach baths in Hungary is 385 (Németh, 2013). There are 73 qualified medical baths, 62 medical hotels, 107 wellness hotels, 2 carbon dioxide therapy centers (mofetta treatment). Furthermore, there are 14 official health resorts and 5 therapeutic caves which is a curiosity in Europe.

3.4 Treatments

Due to the above mentioned natural sources and facilities, the following treatments are available in Hungary:

- Hydrotherapy, it includes all the treatment, which involves the use of water, not by all means with mineral water. Various kinds exist, weightbath, underwater massage, mud packs and fizzy baths belong to hydrotherapies.
- Balneotherapy, healing illnesses with utilizing the beneficial effects of mineral water and several types of mud, medical bath, mud pack and drinking cure belong to these therapies.
- Movement therapy, using exercises to correct certain functions of the body, medical exercising, manual therapies, massages are included.

- Electro therapy, there are different types such as low-, medium- and high-frequency treatments, ultrasound treatment and pulsating magnetic treatment.
- Photo therapy, based on the beneficial effects of specific wavelengths of lights, infrared therapy, ultra-violet therapy and laser treatments are available.
- Climatic therapy has various types, there are different climatic places in Hungary, with several climatic effects, especially caves and mountains. In Hévíz dry salt therapy is available, which is efficient treatment for respiratory diseases, and recommended for smokers.
- Thermo therapy, during the treatment the heat energy's positive effect on the organism is utilized, meaning both hot and cold treatments, for example cryotherapy, steam room or sauna mentioned here.

3.5 Clusters in general

Clusters are geographic concentrations of interconnected companies, specialized suppliers, service providers, and associated institutions in a particular field that are present in a nation or region (Regional cluster strategies, 2013).

Clusters are arising continuously. Forming clusters has a lot of advantages, they increase the productivity with which companies can compete, decrease the costs of doing business. If there is a common aim, it makes easier to achieve it together, in corporation instead of rivalry. As a group, the members can maintain easier good relationship with the related and supporting industries. They can handle easier the unexpected events, which are out of their control such as economic crisis. Clusters provide support for innovations and entry to international market. The main purpose is to create a competitive advantage. It is also important for governments and other institutions to develop and upgrade the clusters.

3.6 Pannon Thermal Cluster

In Hungary it is not common yet, to form clusters. It is unique that the companies belong to the same industry, cooperate instead of competing. It is one of the reasons, why the Pannon Thermal Cluster is emphasized, which situated in West-Hungary. It was established on 22 June 2001. It is operating in four counties: Vas, Győr-Moson-Sopron, Veszprém and Zala (Pannon Thermal Cluster, 2013). The members are medical and thermal baths, medical and wellness hotels, sanatoriums, councils which are interested in the development of medical and health tourism, tourism advisory firms and non profit organizations.



FIGURE 3: Pannon Thermal Cluster's location in Hungary (Edited, Original source of map: www.celluloz.hu)

Clusters can be formed because of several factors. Pannon Thermal Cluster is based on plentiful natural resources. The main target is the better utilization of these values, taking more advantage. It is continuing a non-profit activity, providing benefits its members and for the society, including advocacy of the members. The efficient cooperation helps to evolve and maintain new connections in thermal and

medical tourism, and through them build plans for development. Further activities are supporting of researches in this area, organising education and trainings with the appropriate experts. As it is mentioned above clusters are new phenomena in Hungary, therefore to get the people familiar with Pannon Thermal Cluster also aimed. It concludes easier prevailing and achieving the overall goal of the organisation.

3.6.1 Organizational structure

The top of the organization is the presidency including 7 members, which meets at least in every half year. Then there is the supervisory board consists of 3 members, and there are general compulsory meetings once per year. And last but not least there is a coordinator. The members pay membership fee, the amount of that depends on the scope of activities.

3.6.2 Services of Panterm

The most important services provided by Pannon Thermal Cluster are the following:

- make the benchmarking and logistic database,
- maintain and expansion partnerships,
- develop common acquisition,
- form common image, edit and submit image issues
- provide information continuously about the activities and plans of the members,
- measure and satisfy the educational and training needs
- exposition of lobby activities
- participate in the national and international tourism exhibitions, conferences and workshops,
- edit offer catalogues in foreign languages,
- projectmanagement.

3.6.3 SWOT

The evaluation of the region`s situation is implemented with providing a SWOT analysis.

Strengths

- The West-Hungarian Region has rich thermal water resource, which is the basis of the medical and thermal tourism
- Traditional bath culture
- High number of visitors and baths
- Great and expanding accommodation capacity
- Favourable geographical situation (European Union, effective demand of Austria, Northern countries, Russia).
- Lake Hévíz is world attraction
- Organizations in the region, which help in building and maintaining the co-operation (West Transdanubian Regional Development Agency, Pannon Business Network).
- Pannon Thermal Cluster, as a relevant driving force for its members with common target and interest
- Cooperations across borders
- Strong tourism background
- The generally known and worldwide recognised Hungarian medicine

- The appearance of service providers built on unique concept

Weaknesses

- Undeveloped transport infrastructure of West Transdanubian Region, certain hardly accessible parts
- Unutilized attractions, contrast between supply and demand (thematic supply but complex products)
- The opportunities for free time activities are uncoordinated
- Deficiencies in communication, bad communication channels
- The lack of the regional, common view, conflicts and competition instead of trust and cooperation
- There is no integrated regional image
- The lack of common marketing strategy, insufficient human resource management
- The therapeutic effects of medical factors are not emphasized properly, not well-published
- The low degree of probating Panterm's interests

Opportunities

- More active marketing activities, create an integrated image

- Better utilization of web 2.0 technology and social networks in marketing (online information flow)
- Support the international presence (Northern market as a new target)
- Get the secondary, regional airports more involved into the international traffic (Hévíz-Balaton Airport, Seinäjoki Airport)
- Utilize the willingness of other countries for cooperation across borders (neighbouring countries)
- The success of Panterm: Thermal European Spa Word (between Burgenland, Slovenia, Steiermark and Panterm)
- Helping of the cooperation of Panterm with other Hungarian clusters.
- Further expansion of Panterm by adding new members.
- Enhance the product and service development activities, strengthen the position (longer staying, lower seasonality, lower need of labour)
- Better utilization of the European Union Sources.
- Forming a health conscious lifestyle in Hungary, strengthen the sense of responsibility for prevention of illnesses.
- Highlight the uniqueness of the medical factors.

Threats

- Unstable economic and political situation in Hungary (increasing unemployment, insecurity, lack of reforms).

- Neighbour countries with better geographical characteristics deprive the demand.
- The risk of the oversupply in the field of medical and thermal tourism.

The analysis indicates the strengthening of the international presence of the region. Northern Europe can be aimed as a potential main sending market, with a new marketing strategy. Social media should be involved more intensively, making possible to reach wider target group. The creation of a new image with taking into consideration the younger generation would be beneficial. The secondary airports are reappraised, the low-cost airlines play more important role. The cooperation with other agencies across borders would be a competitive strategy, for developing connections.

4 THE MOST VISITED BATHS IN THE REGION

It is visible from the following table, that the most visited cities are connected with thermal baths.

TABLE 1: Most visited Hungarian cities * () Number of guests nights at commercial accommodation units (000s). Source: HCSO

Most visited Hungarian cities*			
	Domestic	International	Total
1.	Budapest (877)	Budapest (6423)	Budapest (7300)
2.	Hajdúszoboszló (464)	Hévíz (670)	Hévíz (1005)
3.	Siófok (410)	Bük (368)	Hajdúszoboszló (716)
4.	Hévíz (335)	Sárvár (269)	Bük (635)
5.	Zalakaros (291)	Hajdúszoboszló (252)	Siófok (582)
6.	Gyula (268)	Balatonfüred (229)	Balatonfüred (484)
7.	Sopron (267)	Győr (200)	Sárvár (447)
8.	Bük (267)	Siófok (172)	Zalakaros (431)
9.	Balatonfüred (255)	Zalakaros (140)	Sopron (361)
10.	Eger (214)	Sopron (94)	Győr (358)

The table shows, that the spas and Lake Balaton are the most popular after Budapest among the visitors. I would like to emphasize the three cities, Hévíz, Bük and

Sárvár, where the spas of the Pannon Thermal Cluster are situated. These are the first three, if we concentrate on the foreigner visitors, motivated by health tourism.

4.1 Hévíz

Of the more than 200 baths and thermal springs of Hungary, Hévíz is the largest biologically active natural thermal water lake of the world. It is located close to Lake Balaton in Hévíz, and has a history of 2000 years.

Lake Hévíz was included in the recommendation list of the World Heritage National Hungarian Committee in January 2003.

The main attractiveness of Hévíz, is the healing effect of the water of the lake. The traditional “Hévíz treatment” is 200 years old. The lake is 38 metres deep, the water surface is 4.4 ha big, it is rich in sulphur, radium and minerals. The water completely changes in every 48 hours due to its high well capacity. The temperature of the water is 23-25 °C in winter and it can be 33-36 °C in summer.

The water of Lake Hévíz is rich in carbonic acid, sulphur, calcium, magnesium, hydrogen carbonate and slightly radioactive substances. The favourable characteristics are combined, thanks to the content, including an equal proportion of dissolved and gaseous substances.

The mud of Hévíz, which covers the bottom of the lake in a thick layer has a unique beneficial effect. The radioactive medical mud of Hévíz contains both organic and inorganic materials, and the radium salts and reduced sulphur compounds are the most important valuables.

The combination of the medical water and mud which is originated from the tens of thousands of years old Pannonian sea, – Lake Balaton is the last remnant of the ancient Pannonian sea – and the complex physiotherapy treatments are practically suitable for the treatment of all rheumatic and locomotory diseases.

There are several types of treatments and medical cures are available for the visitors, which efficiency is proven by the full scale diagnostics and 200 years of professional competences. Complex hospital services also provided beside the traditional treatments. The Saint Andrew Hospital's history takes back to 1952, when its predecessor was established. In addition to the rheumatology treatment, there are general medicine, neurology, ortopaedia, surgery, urology and dentistry departments.

A new department, the Wellness Centrum was opened in 2009, providing new generation services, which differ from the traditional treatments, such as eastern massage or bubble bath (Lake Hévíz, 2013).

4.1.1 Medical treatments

The following medical treatments are available in the spa of Hévíz. The variety of therapies is specified by the type and duration of the disease and the general condition of the patient.

The traditional treatment of Hévíz, lasts for 2 weeks, and begins with an examination provided by a specialist, usually carried out by a rheumatologist doctor. The therapy contains several types of treatments applied together, such as mechano-, balneo- and physiotherapy treatments, enhancing the beneficial effects of them.

Packs

- Packs with medicines: Fluoride pack, Sulphur pack, Ritex pack
- Medical mud packs: Hévíz mud-pack

The Hévíz mud-pack is a unique treatment, thanks to the special healing effect of the mud of the lake, which originates from the Pannonic-sea, tens of thousands of years ago. It is a radioactive medicinal mud, including precious ingredients, such as radium salt and reduced sulphides.

The body is wrapped with the mud during the treatment which lasts for 20 minutes and followed by a 30 minute long relaxation. The treated part of the body is kept warm by the mud. The treatment is suitable for rheumatic and locomotive diseases.

Medical exercises

- Spinal gymnastics
- Shoulder gymnastics
- Breath exercises
- Lymphdrainage

Massage therapy

- Medicinal massage

The massage therapies have another sense of meaning than usually. The medicinal massage is preceded by 10-15 minutes long thermal water bath, which helps the soft tissues relaxation, enhancing the beneficial effects of the massage. There are variety of types are available, such as, Swedish, reflex-zone, lymphatic, sport and refreshing massage.

Hydro-galvanic treatments

- Four-cell galvanic bath
- Electric bath

Hydrotherapeutic treatments

- Thermal pool with medical water
- Weight bath
- Underwater stream massage (Tangentor)
- Hydroxeur

The weight bath treatment was invented in Hévíz by Dr. Károly Moll, a Hungarian doctor. It is recommended for clients suffering from pain in spinal column at neck or lumbar.

The essence of this method of healing is to stretch the spinal column with removing the vertebrae from one another, help to regenerate the intervertebral disc into the original condition. During the underwater treatment, there are 2,3 or 5 kilograms weights hang on the clients` back and ankles, while they are “hanging” in the water fixed on the neck and under arms. Thanks to the elevating power, the treatment is absolutely painless.

The special type of underwater massage, the so called Tangentor is performed by an intensive water stream. The treatment is held in a physiotherapy tank, with a water stream coming from a tube, controlled by a specialist. The effect thanks to the vibration of the water, which impregnates the connective tissues.

Physic therapy

- Electro-therapy (Ultrasound, Underwater ultrasound, Sonoforesis, Iontophoresis, Interference, Diadynamic voltage, TENS, Selective stimulous voltage treatment, Galvanic electricity treatment)
- Magnet-therapy (Magnet-circle, BEMER magnetic mattress therapy)
- Light therapy (Infrared therapy – Solux, Polarized light therapy – Bioptron)
- Inhalation therapy (Medicine inhalation, Oxygen inhalation)
- Thermo-therapy (Cryotherapy)

The Electrotherapy treatments are implemented by electrical energy. There are three different types differentiated, low-, medium- and high-frequency treatments. Ultrasound, Magnetic circle, Diadynamic, Ionomodulator, Sonoplus, Stymat, SonodynatorDiodin and Endomed treatments and Cryotherapy belong to low frequency treatments. During the treatment energy is sent to certain parts of body, via electrodes. Electrotherapy has beneficial effects for ligament injuries.

Climatic therapy

- Dry salt therapy

Dry salt therapy belongs to the climate therapies, based on the imitation of the climate of a salt mine. The beneficial effect due to the high salt concentration in the air, the inhalation of the germfree climate is suitable for respiratory diseases, asthmatic and allergic symptoms can be effectively treated and recommended for smokers.

Drinking cure

- The spa source of Hévíz

The drinking cure of Hévíz, with the sulphuric water is suitable for gastroenteritis and digestive problems, enhances intestinal activity and can be applied effectively for biliary disorders (Hévíz Therapy, 2013).

4.2 Bük

Bükküfűdő Health and Adventure Centre is one of Europe's best-known and most popular medicinal spas, with a special Medical Wellness Centre and with the most modern sauna world in Hungary. The Medicinal Spa of the year 2011.

It is a real spa complex with 32 pools and a water surface of more than 5200 m², located on 14 hectares.

The water was discovered during oil research-drillings in 1957, when a 65-70 metre high column of water spouted to the surface from 1282 metres deep. The water's temperature is 58 °C, and it includes 14 000 mg/l minerals.

The medicinal water, thanks to its components such as calcium-magnesium-fluoride and much carbonic acid gas are efficiently used for the therapeutic treatment of locomotory diseases, gynecological problems and drinking cures are also provided against digestive troubles (Boda, 2004).

4.2.1 Service departments

Spa and beach

Open-air swimming-pools, medicinal water pools and also paddling pools can be found on the 14 hectares park of Bük. The medicinal water pools has the temperature of 32-38°C, the other pools for sporting contain 26-28°C water. A slide complex provides experiences with wild variety of slides not only for children.

There is a rest-zone department in the spa park for the perfect relaxation, sun terraces and galleries provide comfortable recovery for 500 persons. The guests can enjoy the environment on the green roof and indoor gardens also keep the close to the nature independently from the weather.

There are several services provided for children, such as entertaining programmes and various playgrounds. Sport lovers can enjoy the sport grounds of mini golf, beach volley ball and –handball, foot tennis, football and table tennis (Bükfürdő, 2013).

Adventure bath

The indoor adventure bath is open all year, with wild choice of facilities for refreshing independently from age, such as the circulating river, the bubble beds, the bubble bath and the paddling pool for children.

The three part slide complex provides unforgettable experience with its special light and colour effects. There are also night bath parties organised regularly.

The outdoor park of the department offer services for relaxation in the green environment with sun bathing terraces (Bükfürdő, 2013).

Sauna world

The sauna world of Bükfürdő Health and Adventure Centre has the most recognised sauna facilities in Hungary, providing great variety of sauna services. It is proven by a prestigious occasion, The II. Sauna Seance Oscar - the national final of the sauna masters. The exclusive sauna world has an individual architectural design, offering high quality services and organise regularly special sauna seances.

The sauna world's capacity is 150 persons, and it provides various types of saunas. A tepidarium, steam baths, infra and Finnish saunas, an ice cabin, an aroma sauna and an outdoor Finnish sauna welcome the sauna lovers. There are rest zones and atmospheric sauna gardens, which ensures the relaxation and refreshing after staying in the sauna. The cold water immersion pool both indoor and outdoor, Jacuzzis and the Kneipp-pool makes perfect the experience of sauna session.

- Aromatherapy steam room

The steam room with its 45°C temperature at 100% relative humidity has a beneficial effect on the respiratory tract, skin and circulation. Thanks to the various types of aromatherapy oils, it is a gentle way to remove toxins and relax.

- Finnish stone sauna

The natural stone covered sauna has 85 to 90 °C temperature and 10-30% relative humidity. It helps to remove toxins, increases the blood circulation and metabolism and strengthens the immune system.

- Herbal cabin

The air in the room is 70°C hot, with a 10-40% relative humidity. The special herbal aromas cleanse the respiratory system and promote relaxation.

- Infrared sauna

The temperature is 50°C with the relative humidity of 10-30%. The infrared rays have special effect on the blood circulation, speed up the metabolism and strengthen the immune system. It helps to loosening the muscles, contributes to body shaping and has a spectacular effect on the skin.

- Crystal steam cabin

The temperature is lower in comparison to the sauna, 45°C, but the relative humidity reaches the 100%, and it has similar beneficial effects through more gentle way, helps in relaxation, detoxification and stimulates the immune system.

- Tepidarium

Continuous steam circulation at the temperature of 28-32°C, 10-30% humidity ensures the relaxation and strengthens the immune system. Thanks to the preheated marble beds, you can enjoy the staying longer.

- Aroma sauna

The temperature is 65°C with the humidity of 30-50%, enhance relaxation and purification complemented by the beneficial effects of a variety of aromatherapy oils.

- Devil sauna

100°C hot Finnish sauna, 10-30% humidity, stimulates blood circulation, trains the hearth, strengthens the immune system and has beneficial effects on metabolism processes.

- Finnish wood sauna

The guest can enjoy sauna in the sauna garden, with the temperature of 85-90°C, 10-30% humidity. It stimulates blood circulation, trains the hearth, strengthens the immune system and speeds up metabolism.

- Ice cabin

It is a gentle way to cool down after sauna, the body is not shocked by cold water, the temperature is 15-18°C (Bükfürdő, 2013).

Medical Wellness Centrum

The promotion of health is served by the Medical Wellness Centrum of Bükfürdő, with a variety of services for the perfect regeneration. The department provides wellness and fitness services, relax and exotic massages, thermo spa treatments. There are condition survey and medical supervision for ensuring the recreation, thanks to the excellent medical specialists.

Among the wide choice of massages, there are aroma massage, pampering massage with orange-cinnamon oil, honey massage and a special Hungarian massage the so called "Hungaricum massage" available, which beneficial effect lies in a special ingredient, the Vinum Tokajnese, a Hungarian wine. There are also several types of exotic massages, such as Ayurveda massage, Lava stone massage, Hamam massage, Lom- lomi massage and Orient charm massage.

The Thermo Spa treatments facilitate lymphatic and blood circulation, enhance the metabolic processes, tighten the connective tissues, suitable against psoriasis, rheumatic problems and also have beneficial effects for joints and muscles. There are waterbed massages, and several kinds of packs like algae, herbal oil and sea salt packs are available.

The salt cabin provides traditional healing method based on a hundred of years of experience, due to the beneficial medicinal effects of salt. Salt therapy can be applied effectively against a wide scale of illnesses: lung disease, asthma, bronchitis, sinus inflammation, inflammations of the respiratory system, cold, neurosis, heart and blood vessel diseases, mycosis, gynaecological problems, gout, blood pressure problems, gallstone, kidney stone, diabetes, allergy, skin diseases and stress (Bükfürdő, 2013).

Therapy

The beneficial effects of therapies are due to the unique components of the medicinal water of Bük, which has an alkali-hydrocarbonate content and contains high degree of calcium, magnesium and fluor. The treatments are provided in the Insti-

tute of Physiotherapy, using both traditional and modern therapeutic methods, with a supervision of professional physiotherapists.

- Medicinal massages

The beneficial effects are enhanced of massages because they are combined with the advantages of medicinal water. The treatment affects to the whole organism, but there are special types offered, like Lymphatic drainage which is recommended for oedemas and after operations. The foot reflex massage optimises the blood circulation, relieves stress and removes the roughage.

- Hydro therapy

There are underwater massage (tangentor), aroma bath, bubble bath, electric bath, carbonated bath and weight bath available, with using the beneficial effects of medicinal water, for healing diseases and for well-being.

- Electro therapy

Low- and middle-frequency treatments are applied, there are galvanic currency treatment, iontophoresis, interference current treatment, selective stimuli current treatment and TENS provided.

- Laser treatment

The laser ray has beneficial effect for the immune system, suitable for pain easing and muscle relaxing and diminishes inflammation.

- Ultra wave therapy

The electric energy is transformed into mechanic energy with a crystal. The treatment has positive influence on the conjunctive tissues with implementing a so called micromassage effect.

- Remedial gymnastics

The treatment is a type of movement therapy, which is applied to regenerate several functions of the body, for example blood circulation or neural system. There are both dry and underwater gymnastics available.

- Medicinal packs

Treatments with a pack containing 10-12 ingredients, with the temperature of 41-42°C effectively applied for chronic joint inflammations of spinal column and after operations.

- Pampering massages, relax massages and combined massages

There are an outstanding variety of massages with several beneficial effects, including hot roll massage, skin rejuvenating massage, vitalising massage, regenerative massage, refreshing massage, skin tightening and wellness sports massages (Bükfürdő, 2013).

4.3 Sárvár

In Sárvár there are two types of medical water was emerged in 1961 during the petroleum explorations. The 83°C water is coming from 2000 metre deep, it contains natrium chloride bicarbonate, iodine, bromine, fluorine, just to mention a few of them. The other type is high salt content medical water springs from the depth of 1200 metres, with the temperature of 43°C, what is used for the bath located in Sárvár (Boda, 2001).

The Danubius Thermal Hotel was opened in 1985, which was the predecessor of the Sárvár Medical and Wellness Bath today.

The Sárvár Medical and Wellness Bath operate since 2002. The bath was awarded many times, the only bath in Hungary, became the members of the Royal Spas of Europe in 2004, got the EuropeSpa Med award of the European Bath Association in 2007. In 2008 it was categorised to the highest rank by the Hungarian Baths Association. In 2010 the bath was developed a family bath complex, which reached the number of 720 000 of visitors in 2011.

Since 19th October 2012 Sárvár also can be classified as a health resort among the 13 other places in Hungary, including Hévíz and Bük (Sárvár, 2013).

Despite of the extent how rich is Hungary in thermal and medical waters as I already described above, there are only 14 townships in Hungary which can be addressed officially "health resort". There are many strict requirements set by National Public Health and Medical Officer Service which has to be satisfied for this title.

The healing water of Sárvár has beneficial effects for several problems, there are appropriate treatments for locomotive diseases, neurological complaints and also rehabilitative after-treatments are provided, or clients can take muscle relaxing baths. The salt gained with distillation from the high salt content medicinal water also used for salt based treatments, which are suitable for chronic gynaecological inflammation diseases, hypogastric disorders, and to treat respiratory and kinematic problems. There are several services provided by the bath, depending on the visitor's needs.

Medicinal spa

The excellent quality of medicinal water of Sárvár is effectively applied for rheumatic diseases and joint problems, and provides perfect relaxation for every generation thanks to the great variety of pools.

There are outdoor and indoor adventure pools, with the water at the temperature of 32-34°C, outdoor and indoor medicinal pools from the temperature 34°C to 38°C. The bathing facilities are complemented with, drift corridor, bubble bath, water gymnastics and other animated programmes are also provided.

The bath cures can be complemented with the variety of medicinal treatments, supervised by excellent rheumatologists for the optimal setting of therapies.

- Healing massage,
- feet reflex-zone massage,
- inhalation,
- oxygen therapy,
- salt cave,

- weight bath,
- carbonic acid bath,
- Sárvár Crystal Saline bath,
- mud pack,
- electro-treatments,
- laser treatment,
- ultrasonic treatment,
- underwater massage,
- therapeutic gymnastic,
- 4-chambered galvanic bath,
- contrast bath,
- electronic bath,
- infrasauna,
- magnetic therapy,
- medicinal pack,
- lymphatic massage,
- shock wave therapy,
- biopton light therapy,
- manualtherapy.

Family spa

A family bath with its 5000 m² department is connected to the medicinal spa, therefore the whole family can enjoy the services at every age from the following facilities:

- wave pool,
- baby pool,
- giant Jacuzzi,
- kid`s pool with slides, aqua canons and sprinkle gate,
- broad family slide,
- 3 giant slides going all around the building,
- playing hall,
- babies` world,
- 8 meter high climbing wall,

- 25 metres swimming pool,
- bowling,
- broad rest zones for relaxing,
- giant sun terrace.

Beach

There are wide choices of pools and other outdoor facilities available from May 1st till the end of September.

- beach pool,
- diving bay,
- 4 course race water slides,
- wave pool,
- 3 giant slides,
- kids` adventure pool with pirates` ship and water fortress,
- baby splash,
- playing grounds,
- retro spa pool,
- sport fields: beach volleyball and football, petanque

Wellness

The wellness department provides wide range of massages for the perfect relaxation: migraine massage, manager massage, vitalising massage, honey massage, chocolate and mint massage, lava stone massage and sport massage, and a special type of massage the waterbed massage treatment is available.

Beside the massages there are Ayurveda and oriental treatments, different types of baths and packs offered.

The fitness opportunities have also wide scale, from pilates and joga through the water gymnastics and spine gymnastics, aquapad and aquafitness, TRX and aerobic trainings, therefore everyone can find the suitable movement.

Among the outdoor and indoor saunas there are bio sauna, steam rooms, aroma cabins, Kneipp pool complemented with adventure showers and giant Jacuzzis. There are sauna rituals organised regularly in the sauna world of Sárvár Spa and Wellness Bath. It means special sauna séances, when the saunas beneficial ef-

fects are accompanied with the advantages of different ingredients, depending on the type of the actual infusion, it can be salty, honey or icy.

5 THE NORTHERN MARKET

The following table presents the inbound tourism to Hungary from five countries from the Northern area. It shows increasing tendency, therefore presents the importance of this area as a sending market.

TABLE 2: Arrivals and guest nights at hotels (HCSO, 2013)

Arrivals and guest nights at hotels				
	Arrivals		Guest nights	
	2012	2012/2011	2012	2012/2011
Estonia	4 564	+36,4%	9 949	+38,3%
Finland	40 542	+12,1%	125 508	+16,5%
Norway	43 703	+29,7%	139 880	+29,4%
Russia	159 212	+26,6%	582 330	+31,8%
Sweden	80 066	+26,1%	230 420	+29,1%

All of the countries indicate growing from 2011 to 2012. Russia has the most considerable data. Russia is indeed relevant sending area in Hungarian tourism, but it has to be taken into consideration that it can be derived also from the size of the country. Estonia has the less number of guests, but it is not ignorable, that it shows the biggest increasing in both aspects. In comparison to the others, Hungary is quite common target from the Sweden market, and the number of the guest nights is almost three times of the number of the arrivals from there. Finland and Norway are in similar position.

5.1 Northern-Europe

The economic and political stability and higher standard of living than the EU average are common features of the Northern countries. Thanks to the stabilized budget and low degree of debt, they could treat the financial crisis successfully. The consumption is growing in 2013, there are no relevant changes expected in the tourism consumption. The length of paid holidays is among the lengthiest in Europe, the unemployment rate is relatively low, in conclusion, the demand is kept stabilized by these factors.

The travelling habits in Northern Europe are similar, they usually take 3-5 travels per year. The summer holiday is essential it is 2-3 weeks long, inland or at the Mediterranean-sea. It is complemented with a one week long winter holiday at European ski resorts or by warm sea. In addition, it is common to travel for weekend, it is usually classic sightseeing in Europe or travels to satisfy special needs, such as wellness and festivals. The safety has outstanding importance among the travelers from Northern area. The price-value ratio is also a relevant issue, they spend rather for gastronomy or entertainment than for expensive accommodation. Luxurious needs can occur in the case of Danish and Norwegian travelers.

The travel decisions are prepared with online informing, the most of the bookings are done through the internet, as well. The travel agencies packages are expected to get popular because of the recent bankruptcies of airline companies. The explanation is that the package holidays are ensured according to the EU-regulation.

Northern–Europe, despite of the geographical and cultural distance, is one of the biggest sending market of Hungary, with its 600 000 guest nights. The Hungary-aimed travels the sightseeing and the conference tourism are dominating, in the case of Denmark it is complemented with holidays at Lake Balaton, by Norway with dental tourism. Since the main Hungarian airlines, MALEV has ceased, the role of the secondary airports has reappraised. The Hévíz-Balaton Airport got higher attention. It is a strategic goal, to develop and strengthen the “brand of Balaton”, as a recreation and wellness resort.

As for the results, from Northern-Europe till the end of September there were 568 00 guest nights on commercial accommodation were realized according to the HCSO, which means 12% growing compared to the base period. The growing in the number of the visitors was outstanding in Norwegian and Swedish relations, with the increasing of 25% and 20%. The Northern guests, except Danish, almost stay only in hotels, it means the 85% of all the guests nights taken in hotels, and shows an excessively dynamic growing with 20%.

5.1.1 Analysis of the countries as sending markets

The demand on health tourism is affected by various factors, both economic and social impacts, for example income, population, prices, advertising, fashion and taste (Tribe, J., 2011). The tables show some of them regarding the focused countries.

TABLE 3: Characteristics of Denmark

Denmark	
Characteristics of the sending market	
Population	5 543 453
GDP per capita	37 600
Unemployment rate	6,0%
Health expenditures (of GDP)	7%
Internet usage rate	89,0%
Place on the list of the sending markets of the world	28.
Travels per capita	1,7
Holiday travels per capita	1,3
Hungary`s characteristics as a destination	
Place on the list of sending market	19.

Average length of stay:	4,0
on commercial accommodations	80,7%
out of that: in hotels	55,2%
Number of guest nights	156 000

TABLE 4: Characteristics of Finland

Finland	
Characteristics of the sending market	
Population	5 262 930
GDP per capita	36 700
Unemployment rate	7,8%
Health expenditures (of GDP)	11,7%
Internet usage rate	88,6%
Place on the list of the sending markets of the world	40.
Travels per capita	1,5
Holiday travels per capita	1,0
Hungary`s characteristics as a destination	
Place on the list of sending market	21.
Average length of stay:	3,0
on commercial accommodations	72,1%
out of that: in hotels	88,4%
Number of guest nights	130 000

TABLE 5: Characteristics of Norway

Norway	
Characteristics of the sending market	
Population	4 707 270
GDP per capita	54 200
Unemployment rate	3,3%
Health expenditures (of GDP)	9,7%
Internet usage rate	97,2%
Place on the list of the sending markets of the world	19.
Travels per capita	1,5
Holiday travels per capita	1,1
Hungary`s characteristics as a destination	
Place on the list of sending market	23.
Average length of stay:	3,2
on commercial accommodations	70,2%
out of that: in hotels	94,4%
Number of guest nights	142 000

TABLE 6: Characteristics of Sweden

Sweden	
Characteristics of the sending market	
Population	9 103 788

GDP per capita	40 900
Unemployment rate	7,5%
Health expenditures (of GDP)	9,9%
Internet usage rate	92,9%
Place on the list of the sending markets of the world	20.
Travels per capita	1,1
Holiday travels per capita	0,8
Hungary`s characteristics as a destination	
Place on the list of sending market	15.
Average length of stay:	2,8
on commercial accommodations	60,3%
out of that: in hotels	92,2%
Number of guest nights	210 000

All of the countries in the sending market have relatively high GDP, it reflects high public spending. The reason can be the large number of public employees, who receive social transfers for example benefits or retirement programmes. The unemployment rate is low in comparison to the rest of Europe, so the extent of employment is at high level, concluding the job security is favourable, which has positive influence on tourism.

The following figures present the age structure of the countries, highlighting an important demographic factor.

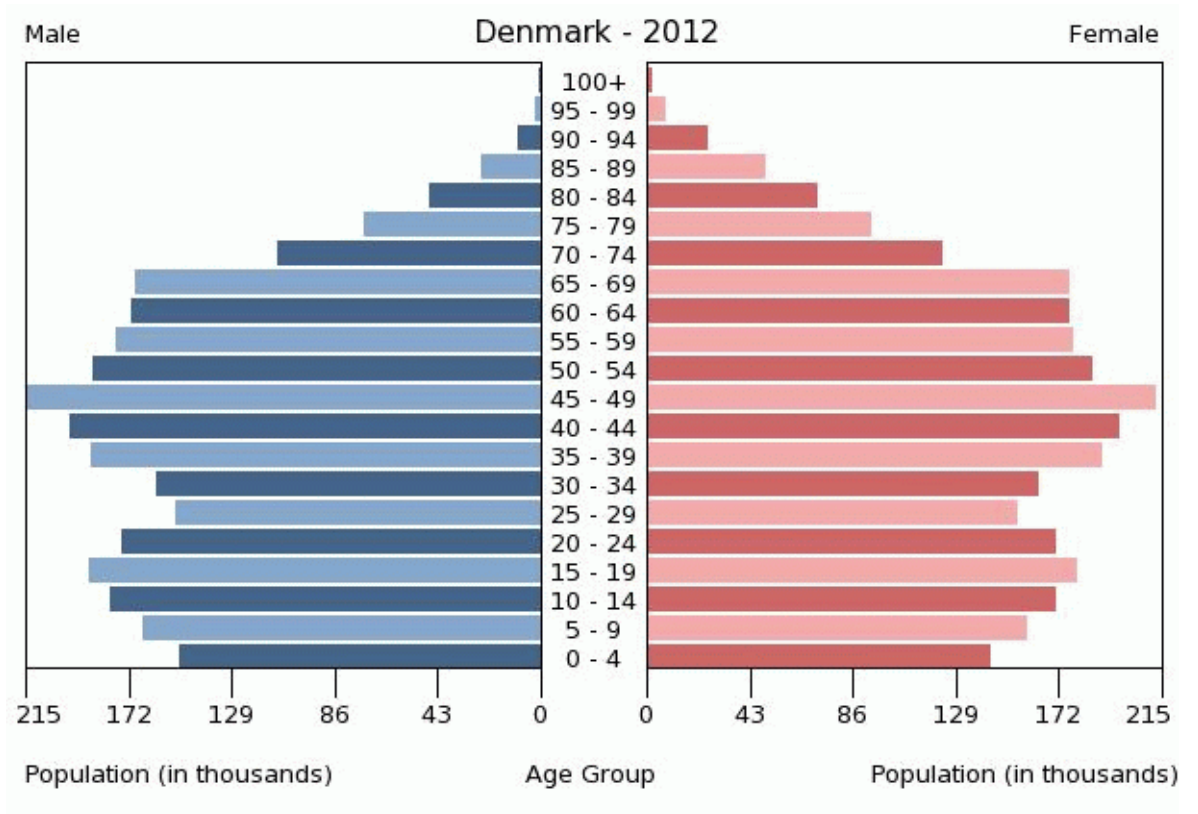


FIGURE 4: The population pyramid of Denmark (Indexmundi, 2012)

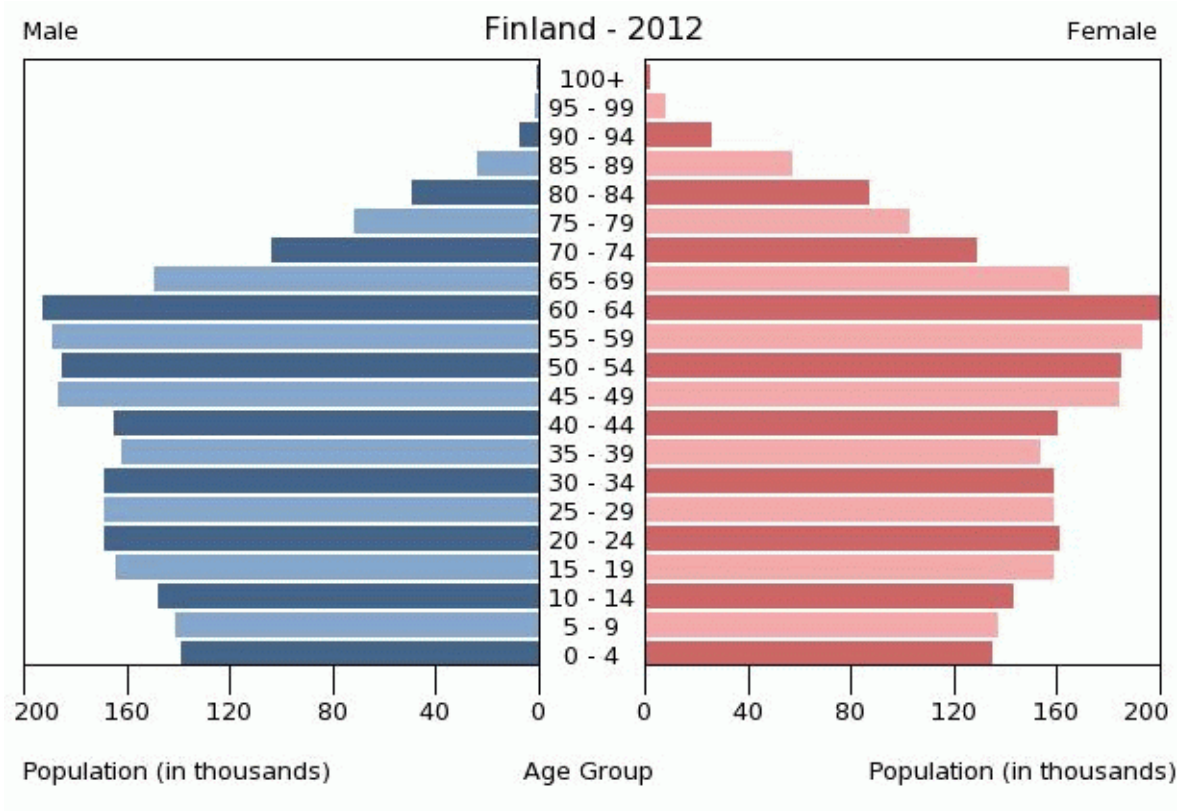


FIGURE 5: The population pyramid of Finland (Indexmundi, 2012)

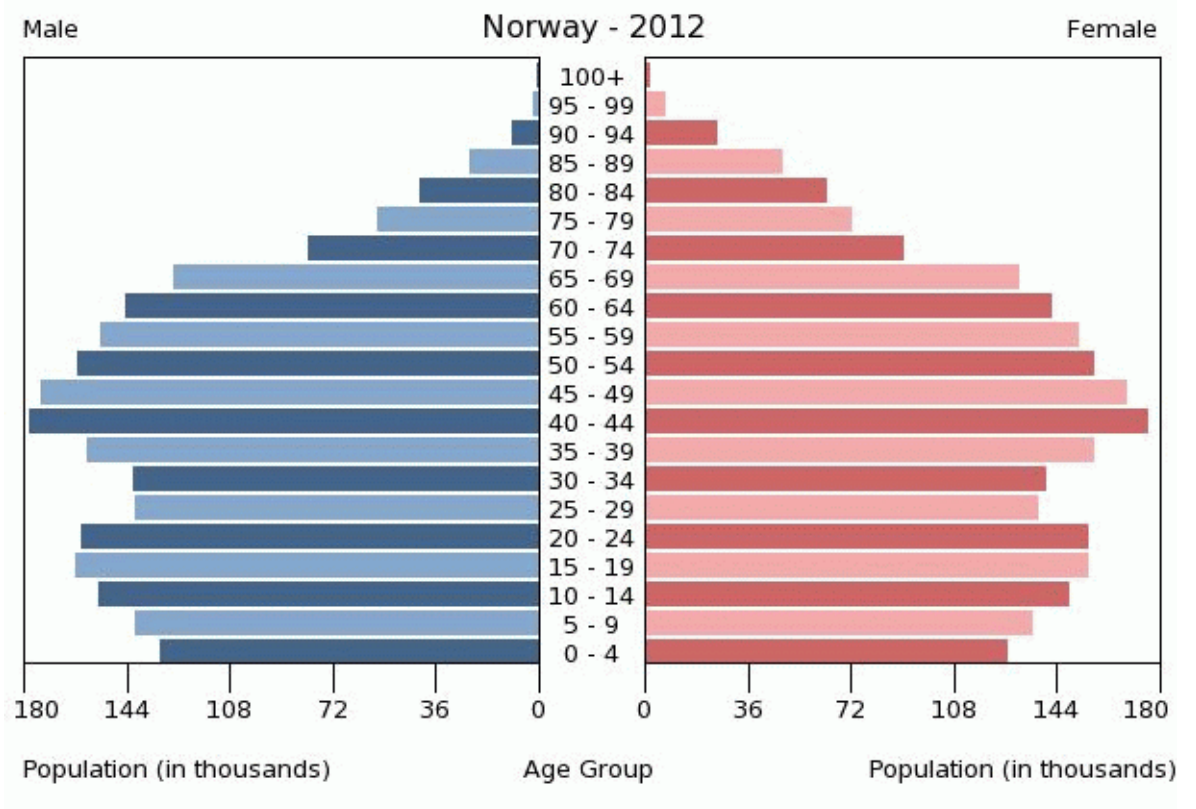


FIGURE 6: The population pyramid of Norway (Indexmundi, 2012)

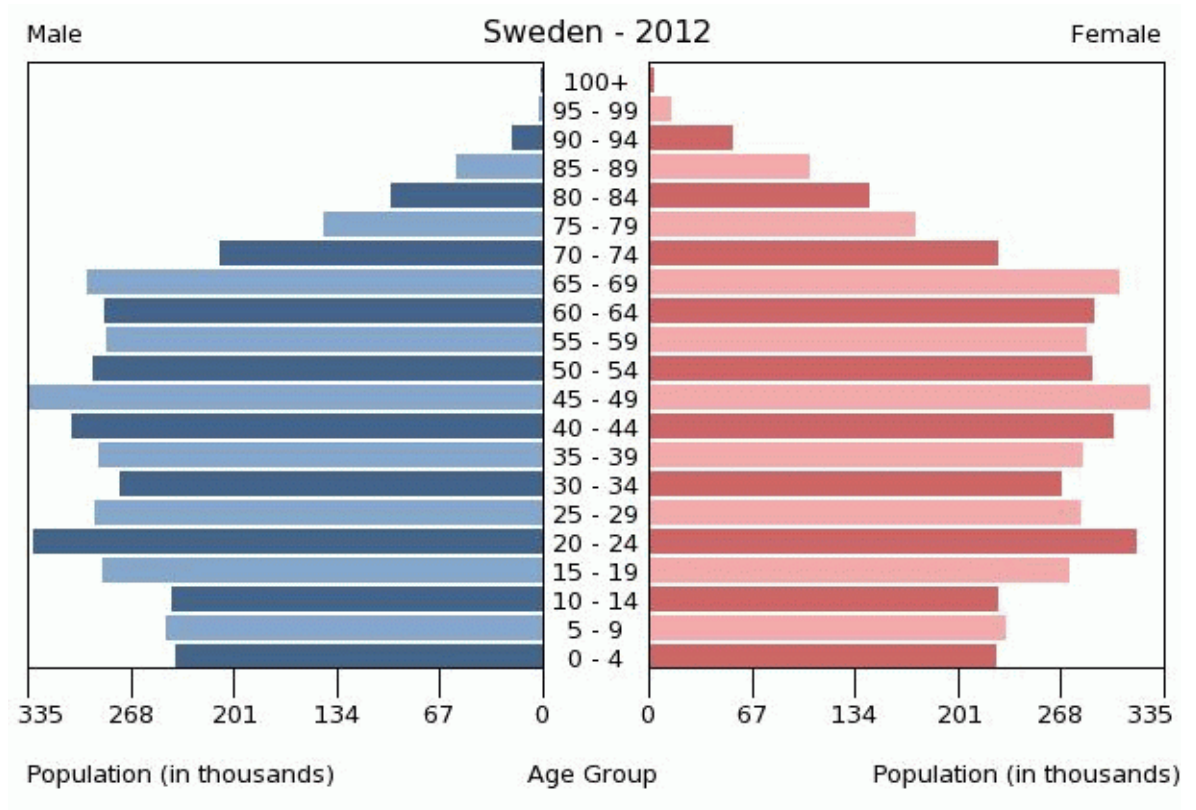


FIGURE 7: The population pyramid of Sweden (Indexmundi, 2012)

The figures present well the potential of the Northern market from demographic point of view. There is a significant rate of older population in all countries, it means relevant investments in health sector. According to the main trend in health tourism regarding the target group's demographic characteristics is a female visitor at the age of 45. A research carried out by Cleaver and Muller (2002) the key target for health tourism sector are the so called "baby boomers", those born immediately after the Second World War.

These trends are changing, depending on the types of services provided for the visitors. The Hungarian spas belong to the traditional spas, where water based healing and natural treatments offered for older people with health specific problems. The main target group is at the age of 50 and 65 is the so called, "empty nesters", whose children are already pop out and the pensioners above the age of 65.

Among these guests Balaton and Hévíz are common destination. Further opportunities lie in the evolvement of the brand of Lake Balaton, with the implementation of more new spa-wellness product, active recreation and family holidays. The younger generation is also a promising target group, which can be aimed with the entertaining facilities and programs. The Night of spas sets a good example which is an initiative to get the attention of that audience for the bath culture of Hungary, to make the Hungarian bathes more popular among the younger. It was organized for the third time in 2012 by the Hungarian Baths Association, it means a curiosity among the night events, almost 40 bathes took part and 80 thousand guests visited the programmes (Hungarian Baths Association, 2012).

According to the general judgment unfortunately there is still no sharp image about Hungary in Northern-Europe. According to the market researches made in 2005-2006 and the experiences of the representatives, Hungary`s image is weak, but positive, the most known elements are Budapest and the bath culture. Strong points are the good accessibility and price-value ratio, the attractiveness of Budapest and the baths. Weakness is the lack of trust in the “service-culture”.

Utilizing the advantage of the expatriate colonies, made by the multinational companies is also a considerable possibility. Thanks to the social networks and web 2.0 technology, they can become the most important marketing allies.

5.2 Nordic model

The social and economic situation of a country has a considerable impact on the demand for tourism. It affects to the travelling habits of the society, influences the spendings of people living there, which depends on their financial situation. The countries Denmark, Finland, Norway, and Sweden are welfare societies, with dominant welfare benefits and elaborated social safety net. From economic point of view, people have higher disposable income in comparison to the rest of Europe and public pension schemes which strengthen the effective demand for health tourism.

The European social model is formed for the European countries, referring to the economic and social perspectives, including living and working conditions. There are four models distinguished in Europe: the Nordic, the Anglo-Saxon, the Mediterranean and the Continental.

Denmark, Finland, Norway, and Sweden belong to the Nordic model. These countries have shared values about principles, regarding social and economic issues. The cooperation spreads to the following areas:

- economy, business and working life,
- culture, leisure and media,
- education and research,
- environment and nature,
- legislation and justice, and
- welfare and gender equality (Norden, 2013).

The characteristics of the Nordic model

The welfare states of Europe belong to the Nordic model, therefore it is also called the Nordic Welfare Model. Its members have common set of basic values about equal opportunities, regarding social security, education, culture, health services and social rights.

Beside the strong social cohesion, the Nordic model is also based on the strong ties between welfare and labour market policy. The welfare system is funded by relatively high taxes. The degree of flexibility on the Nordic labour market and the degree of labour union membership are high. Concerning the gender equality, the women`s opportunities in political arena and labour market are outstanding comparing to the rest of Europe.

There are differences among the Nordic countries regarding the organisation of their policies, but they have to face almost the same challenges, therefore the Nordic cooperation contributes the sharing of the experiences.

The Nordic welfare model is one of the most successful in the OECD rankings as for the economies of different countries (Norden, 2013) The Nordic region is also at the forefront regarding public services, such as free education, universal health care and has innovative development competencies in other areas of social sector, for example in preventative medicine and health.

5.3 Activities aiming the target market

5.3.1 New flights

A direct route from Hévíz to Riga is launching. The first flight from Riga International Airport, Latvia to Hévíz-Balaton airport in Hungary will start on 4 May 2013. A 3 years termed agreement was signed by Hévíz-Balaton Ltd. and Air Baltic Corporation.

The flights will go in summer season, till October, weekly, on Saturdays. This step is a milestone, new markets are opened up for Western Hungarian region. According to the mayor of the municipality of Hévíz they would like Hévíz-Balaton Airport to become the regional airport of West-Hungary (Travelo, 2012). It means an important connection between Hungary and Northern-Europe.

As for the prices – 41EUR/one way (Travelo, 2012) – these flights are affordable for a wide group of people but the main target is the Norwegian, Finnish and Swedish travellers. According to Martin Gauss, the Chief Executive Officer of airBaltic, their business plan is concentrated now on low-demand routes, new summer destinations. There are many connections from Riga International Airport available, only airBaltic serves 60 destinations. The Hévíz-Balaton Airport also offer direct flights to Germany and Russia, and the statistics show that it seems to be very beneficial, the tourists from Northern Europe spend 600 000 nights in Hungary.

5.3.2 Marketing strategy

The Hévíz Tourism Nonprofit Ltd. concentrates on this area, with a more intensive marketing activity. Hévíz was presented in a Scandinavian and Baltic roadshow in April. The program started in Göteborg. The presentation aimed both the professional and the general audience, the feedback was positive. It was followed by a roadshow with the Hungarian Tourism Plc. and with other service providers from Hévíz together. They presented workshops in Stockholm, in Helsinki and in Riga. According to the executive director of Hévíz Tourism Nonprofit Ltd. the main target was to get the attention of the travel agencies, which are cooperating with airBaltic. The main goal is to get Hévíz familiar with the audience and to reach the appropriate number of visitors even from the first Hévíz -Riga flight (Hévíz, 2013).

The experiences have shown relevant interests for the wellness and active relaxation in Hévíz. The Scandinavian and Baltic travel agencies representatives were interested in even for opportunities for bikers, camping and for private houses in this area.

Concluding from the favourable ticket sales, even the first year can be successful. Now they are working on concrete packages and program offers so that the cooperating agencies could offer them and be well informed. There is an active online campaign going on for a month, and it is continuing with concentrating on Norway and Sweden.

There are several successful workshops already implemented by Hévíz Tourism Nonprofit Ltd. in the Scandinavian cities. They presented on the MATKA Nordic Travel Fair, in Helsinki (Finnexpo, 2013) and on the Travel Match workshop in Oslo in January (Travel Match, 2013), and they were also among the exhibitors on TUR Swedish International Trade Fair in Göteborg in March (TUR, 2013). The Hungarian Tourism Destination Management Association is organising study tours for autumn and they are participating on Antor roadshows both in Sweden and Norway. They strengthen their online appearance, adwords campaigns are going

on, in Swedish and Norwegian languages. The long-term overall goal is to build relationships with travel and tour agencies in these countries.

6 CONCLUSION

The target of this work was to provide an overview about the Hungarian wellness and medical tourism and present the Northern countries as a possible main sending market.

The overall goal set in the beginning was successfully reached. The research has proven the potential of the Northern market from the perspective of health tourism.

The new agreement between Hévíz-Balaton Ltd. and Air Baltic Corporation is accompanied with active marketing strategy. The feedback from the campaigns implemented in Northern Europe by the Hungarian Tourism Plc. was positive. The statistics of Hungarian Central Statistical Office indicates the importance of the Northern area, with the continuously growing number of visitors from Northern Europe and the number of guest nights spent in Hungary. The analysis of the countries of the potential sending market has proven the existing effective demand.

Due to the political and economic stability of the Nordic countries there is a growing consumption in this field. Denmark, Finland, Norway and Sweden belong to the welfare societies, people enjoy welfare benefits and high standard of living, and therefore there are no financial barriers of tourism and travelling. The length of paid holidays and the job security support the demand, people have relevant disposable income. Beside the economic issues, the social impacts also indicate the effective demand. Regarding the demographic characteristics of the countries, there is a high degree of older population is presented, which is the target group of the Hungarian spas.

Concluding, the appropriate conditions are given for the success of the highlighted baths in the West Hungarian region. In my opinion Hungary can be presented in the Northern European market like a new health tourism destination. Since I have been living in Finland I could get familiar with the Finnish travelling habits. I find

Finland as one of the concerned countries, a highly possible target market due to my experiences regarding their interest in thermal baths and the connected health services in Hungary.

Taking into consideration only Finland, concrete steps can be defined for further development of the connections between Hungary and the target market. As the study indicates the secondary airports are reappraised, therefore the South-Ostrobothnian regional Seinäjoki Airport is suitable for launching new routes from Hévíz-Balaton Airport. This agreement would be beneficial for both parties, since the mutual interests for increasing the number of passengers and flights. Cooperating with low-cost airline companies would be also a competitive advantage. Travel agencies play key role in developing and maintaining connections. The implementation of the project can be supported by the local travel agencies in Seinäjoki, Oy Eastcon-Finland Ltd. or Matkapojat Oy. The target group in health tourism is changing in parallel with the spreading of a new life style, which is focused on wellbeing and fitness. The younger population will mean effective demand in the future. A new marketing strategy should be improved, aiming also the younger generation, with better utilisation of social media and web 2.0 technology.

BIBLIOGRAPHY

A van Tubergen, S van der Linden, (2001).A brief history of spa and therapy.[Ref. 11 March 2013][ejournal] Available at <http://ard.bmj.com/content/61/3/273.full#R2>

AzEurópaiUnió Magyar ElnökségénekTanácsa.A gyógy-, termál- és ásványvizek hazája.[Ref. 13 March 2013] [website] Available at <http://www.eu2011.hu/hu/gyogy-termal-es-asvanyvizek-hazaja>

Boda, L. 2001. Gyógy- és termálfürdők Nyugat-Magyarországon. Szombathely: B.K.L.K.

Boda, L. 2004. Az erőt adó gyógyvizek világa: a Pannon Termál fürdői. Szombathely: B.K.L.K.

Boronkay,S. (2005), Termál- és gyógyturizmus.[online publication] [Ref. 9 March 2013] Available athttp://www.titzala.hu/letolt/Boronkay_Termal_es_gyogyturizmus.pdf

Best Spa Vacations. [Ref. 28 April 2013] [website] Available at <http://www.tripadvisor.com/Inspiration-g4-c8-Europe.html>

Bükkfürdő.[Ref. 31 March 2013][website] Available at http://bukfurdo.hu/en/about_us/our_history/

Cleaver, M. and Muller, T. 2002. The socially aware baby boomer: gaining a lifestyle based understanding of the new wave of eco-tourists. Journal of Sustainable Tourism. 10 (3): 173-90

Eurostat.[Ref. 28 April 2013] [website] Available at [http://epp.eurostat.ec.europa.eu/statistics_explained/index.php?title=File:Unemployment_rate,_2001-2012_\(%25\).png&filetimestamp=20130417141135](http://epp.eurostat.ec.europa.eu/statistics_explained/index.php?title=File:Unemployment_rate,_2001-2012_(%25).png&filetimestamp=20130417141135)

Finnexpo.The Finnish Fair Corporation.[Ref. 3. February 2013] [website] Available at <http://www.finnexpo.fi/Sites1/Matka/en/Pages/default.aspx>

Gáspár, E.(no date).TermálvizekéselőfordulásukMagyarországon.[online publication] [Ref. 9 March 2013] Available at http://www.matarka.hu/koz/ISSN_1417-5398/77k_2009/ISSN_1417-5398_77k_2009_181-188.pdf

Gyógyfürdők Blog. [Ref. 1. April 2013][Blog] http://gyogyfurdok.blog.hu/2012/08/12/80_ezren_strandoltak

Hévíz.Hírek.[Ref. 3. April 2013] [website] Available at <http://www.heviz.hu/hirek/heviz-skandinaviaban>

Hévíz.Lake Hévíz.[Ref. 4. April 2013] [website] Available at <http://www.heviz.hu/hevizito>

HévízTherapy. Medical treatments.[Ref. 4. April 2013] [website] Available at <http://terapia-heviz.hu/en/gyogykezelesek>

Hungarian Baths Association.Strandok éjszakája.[Ref. 1. April 2013] [website] Available at <http://www.furdoszovetseg.hu/hu/hirek/strandok-ejszakaja-2012-augusztus-10.html>

Hungarian Tourism Plc. (2002).A magyar turizmus marketing koncepciója.[Ref. 11 March 2013][online publication] Available at http://neta.itthon.hu/site/upload/mtrt/Turizmus_Bulletin/02_02/Sz3.htm

Hungarian Tourism Plc. Balaton Presentation. [Ref.3. April 2013][online publication] Available at <http://neta.itthon.hu/szakmaioldalak>

Hungarian Tourism Plc. Marketing plan. Mellékletek. [Ref.3. April 2013][online publication] Available at <http://neta.itthon.hu/szakmaioldalak>

Hungarian Tourism Plc. Marketing plan.Taktikaiterv. [Ref.3. April 2013][online publication] Available at <http://neta.itthon.hu/szakmaioldalak>

Hungarian Tourism Plc. Tourism in Hungary.Tourism in Hungary 2012 with preliminary data.[Ref.3. April 2013][online publication] Available at <http://neta.itthon.hu/szakmai-oldalak/letoltesek/turizmus-magyarorszagon>

Indexmundi. Denmark. [Ref.3. April 2013] [website] Available at <http://www.indexmundi.com/denmark/>

Indexmundi. Finland. [Ref.3. April 2013] [website] Available at <http://www.indexmundi.com/finland/>

Indexmundi. Norway. [Ref.3. April 2013] [website] Available at <http://www.indexmundi.com/norway/>

Indexmundi. Sweden. [Ref.3. April 2013] [website] Available at <http://www.indexmundi.com/sweden/>

Jogtár.Complex hatályos jogszabályok gyűjteménye.[Ref. 6 March 2013][website] Available at http://net.jogtar.hu/jr/gen/hjegy_doc.cgi?docid=99900074.EUM

Magyar fürdőtörténet. [Ref. 13 March 2013] [website] Available at <http://5mp.eu/web.php?a=zalakarosi&o=WRIV6VTqQU>

Nemeth. I. 2013. Magyarország gyógyfürdői. Lecture notes. Presentation of the President of the Pannon Thermal Cluster.[Ref. 17 April 2013] Unpublished.

Norden. About the nordic welfare model.[Ref. 30. April 2013] [website] Available at <http://www.norden.org/en/about-nordic-co-operation/areas-of-co-operation/the-nordic-welfare-model/about-the-nordic-welfare-model>

PannonTermálKlaszter. [Ref. 6 March 2013][website] Available at <http://www.gyogyturizmus.hu/index.php?base=debut>

Peralta, M. A. 2004. Magyarország gyógyítóvizei. Budapest: Carita Kereskedelmi és Szolgáltató Bt.

Regional cluster strategies. (no date). [Ref. 16 March 2013] [online publication] Available at <http://www.workforce-strategy.com/clusterstrategies.pdf>

Research report. (2006). A wellness régióspecifikusjellemzői.[Ref. 9 March 2013] [online publication] Available at http://www.pannontermal.hu/userfiles/Online_GYSZR/Strategiak_szakmai_anyagok/nemzeti_strategiak/A_wellness_regiospecifikus_jellemzoi-kutatas.pdf

Sárvár.(2012). Sárváragyógyhely.[Ref. 18. April 2013] [website]
Available at http://www.sarvar.hu/sarvar_a_gyogyhely_1

Shared norms for the new reality. 2011. [Ref. 30. April 2013]
[online document] Available at
<http://www.globalutmaning.se/wp-content/uploads/2011/01/Davos-The-nordic-way-final.pdf>

Smith, M., Macleod N., and Robertson H. M. 2010.Key Concepts
in Tourist Studies. London: SAGE Publications Ltd.

Thermal bath and medical center, Thermal water occurrences in
Europe.[Ref. 13 March 2013] [website] Available at
[http://users.atw.hu/adandprojekt/index.php?module=viz&PHPS
ESSID=45a9c48277aa5d1ab3a3d6b9d54fdc13](http://users.atw.hu/adandprojekt/index.php?module=viz&PHPS ESSID=45a9c48277aa5d1ab3a3d6b9d54fdc13)

Travelo.(2012). Májusban indul a Hévíz-Riga repülőjártat.[Ref. 6
March 2013][online
article]Availableat[http://travelo.hu/hirek/2012/12/10/majusban_i
ndul_a_heviz-riga_repulojarat/](http://travelo.hu/hirek/2012/12/10/majusban_indul_a_heviz-riga_repulojarat/)

Travel Match Norway. The exhibitors.[Ref. 3. February 2013] [web-
site] Available at <http://www.travelmatch.no/exhibitors.html>

Tribe, J. 2011. The Economics of Recreation, Leisure and Tourism.
4rd ed. London: Elsevier Ltd.

TUR.The Swedish Exhibition Center.[Ref. 3. February 2013] [web-
site] Available at
<http://catalogue.swefair.se/index.asp?ProjectId=13010&lang=EN>

