



The Hungarian Experiences In Health Tourism – Does It Really Work 365 Days a Year?

Dr. Adam Ruzsinkó

president, Hungarian Health Tourism Association

head of health tourism specialization, Metropolitan University

consultant, managing director of EuroSpa Investment Ltd.

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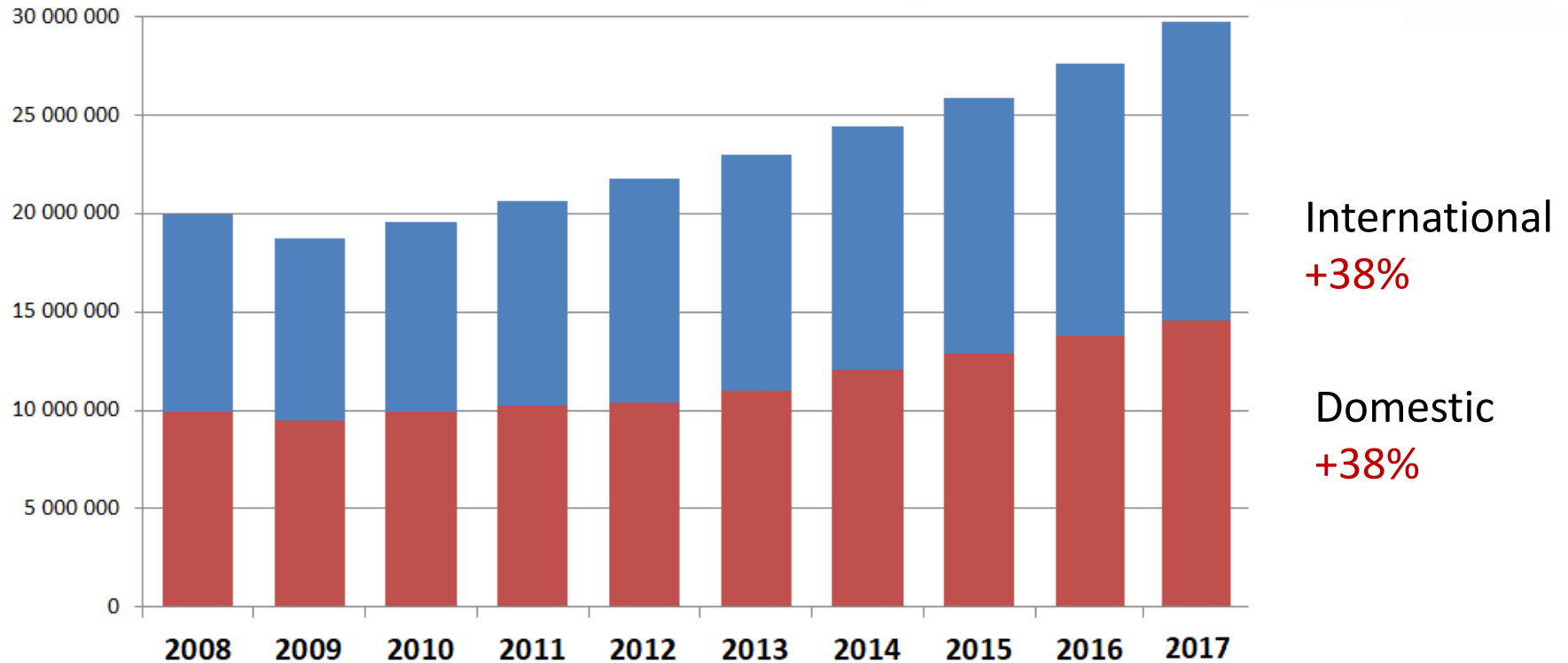
Contribution of Tourism to the Hungarian Economy

- Direct and indirect **GDP contribution** of tourism is **10,3%** (WTTC)
- **338 000 people work** directly in the tourism industry, **9,3%** of total employment
- **Tourism ratio in total employment** with its multiplier effect is **12,1%** (450 000 pax)



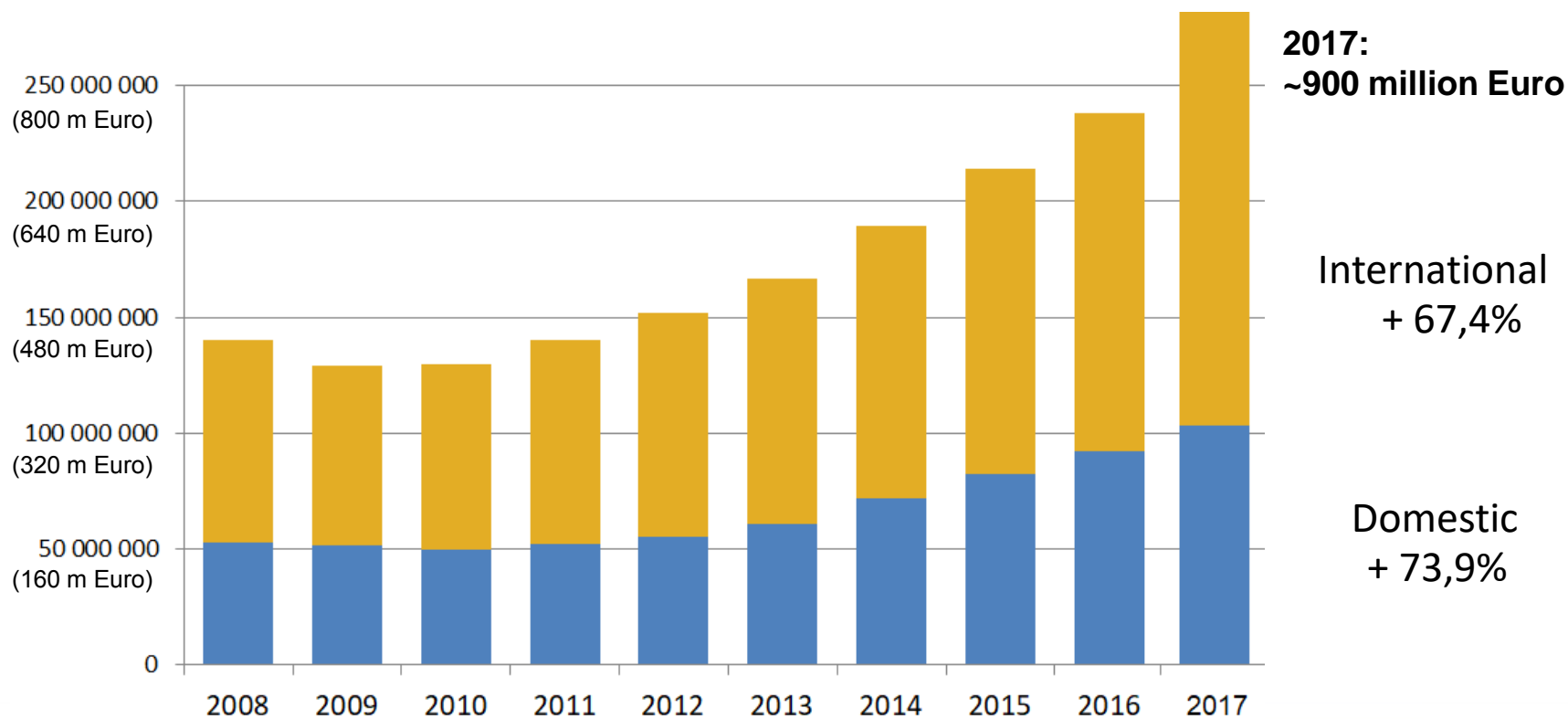
Source: Tourism Satellite Account 2016

Number of Guest Nights, 2008–2017



* Source: Central Statistics Office

Gross revenue of accommodations, 2008–2017 (th HUF)



TOP 10 Sending Countries, 2017

Sending countries	Guest nights (thousands)	Change 2017/2016
Germany	2 073	+8,0%
United Kingdom	1 025	+5,5%
Austria	860	+3,7%
Czech Republic	888	+9,1%
Poland	750	+7,6%
Italy	710	+4,6%
USA	678	+10,2%
Russia	675	+25,9%
Romania	544	+4,4%
Slovakia	481	+7,6%

Source: Central Statistics Office

Why health and medical tourism?

DEMAND

- Medical and health tourism are rapidly growing sectors resulting an increasing patient mobility across borders
- According to the forecast of World Health Organization **tourism and healthcare** together will be the leading economy sectors by 2022.

SUPPLY IN HUNGARY

- Wide range of national treasures
- Ancient traditions, experience and knowledge
- Built heritage, historical monuments (Spas)
- Human resources and **know-how**
- „Hungaricum” treatments (e.g. traction bath, Sensolite therapy)

Hungary has a great potential

- Thermal waters beneath 80% of its land
- 1372 hot springs
- 385 places have a thermal and medicinal bath
- 224 certified medicinal waters
- 70 qualified medicinal baths
- 54 qualified spa hotels
- 32 qualified health resorts
- 5 deposit of therapeutic muds
- 5 medicinal caves
- 1 mofette



Medicinal areas where healing factors are used

- Chronic locomotor diseases
- Dermatology and gynecology
- Gastroenterology (drinking cure)
- Respiratory diseases (caves and climatic therapy)
- Arteriosclerosis (mofette)
- Pain syndrome
- Psychosomatic symptoms



The most important health tourism source markets, 2017

	Number of spa visitors	Spa Hotel guest nights
1.	Austria	Germany
2.	Slovakia	Russia
3.	Germany	Austria
4.	Czech Republic	Czech Republic
5.	Romania	Slovakia
6.	Netherlands	Romania
7.	Ukraine	Poland
8.	Serbia	Israel
9.	Croatia	Ukraine
10.	Russia	Italy

Development of health and medical tourism in the period of 2007-2013

Attraction development

- **Spas: 47** projects – **100 million euros**
- **Medical tourism: 35** projects – **60 million euros**
- **Health resorts:** e. g. Debrecen, Nyíregyháza, Sárovar
- Improving **hotel services and capacity**



Strategic Development of Health Tourism

1. Research (marketing, medical, human)
2. Product Development
 - Uniqueness, specialization
 - Colorful supply within a region
3. General infrastructure (roads, railways, airports)
4. Marketing
5. Education
6. Regulatory affairs
 - cafeteria
 - developments
 - noise level



Special spas – good practices from Hungary

Alsópáhok, Hotel Kolping – family resort

Bük – medicinal specialty: osteoporosis

Budapest, Debrecen, Szentgotthárd – indoor aquaparks

Eger, Budapest – Turkish baths

Hajdúszoboszló – 3 generation spa, aquapark

Makó – spa complex designed by Imre Makovecz

Mórahalom – medicinal specialty: knee and shoulder

Szeged, Székesfehérvár – monument bath in the city center

Sárvár – modern wellness-services

Szentes (national city of sports) – thermal bath and sports

Tapolca – thermal bath and medicinal cave

Tótkomlós – „Rose Bath”

Vásárosnamény – Plum Spa

Mórahalom: 35.000/2000, 450.000/2016



Profitability of a Spa

The profitability of a spa widely depends on the number of profit centers, which can be the following:

1. Entrance fees
2. Extra services (medicinal, wellness, water slides)
3. Gastronomy
4. Own accommodation (hotel, lodges, camping site)
5. Shop (possibly own spa-products)
6. Events
7. Sponsors



Main tasks (and funding options) in health and medical tourism in the new programming period 2014-2020

1. **Examination of the medical evidence on the effects of thermal waters:** locomotor, skin, gynecological diseases (EU);
2. **Health Resort Development:** infrastructure, smaller attractions, comfort level (EU);
3. **Bath-operation to improve profitability:** energetics, IT, service quality, education (EU);
4. **Accommodation:** pensions and hotels (domestic).



The Motivations in Medical Tourism

Patient motivations:

- Quality of care + competitive prices
- Special and innovative medical services, knowledge
- Advanced technology
- Avoiding long waiting lists
- Lack of care forms
- Regulatory environment (e.g.: IVF)



Medical tourism – Hungary

Major disciplines today:

- Dentistry,
- Aesthetic and plastic surgery,
- Orthopedic and spinal surgery,
- Infertility treatments (IVF),
- Balneotherapy, locomotor rehabilitation
- Cardiology, angiology, vascular surgery
- Obesity treatments,
- Ophthalmology



Other disciplines with great potential:

- Oncology
- Neurosurgery
- Pediatrics
- Gynecologic surgery

Hungary's role – strengths

- Reputation – **in dental tourism**
Hungary is market leader in Europe
- Well-trained, **qualified professionals**
- High quality education and training
(45-50% of students of the four medical schools are from abroad)
- **Quality service at reasonable prices**
- High expertise and experience
- International professional protocols,
European standards
- Quality-assured suppliers
- **Good patient satisfaction scores**



Success factors

Sziva, Ivett: International Significance and Success Factors in Clinical Tourism (Journal of Hungarian Interdisciplinary Medicine, 2010)

The major success factors:

- Transparency;
- Image, highly qualified doctors;
- QC, accreditation;
- Price advantage;
- Insurance;
- Innovation;
- Seamless services.



DOES HEALTH TOURISM REALLY WORK

365 DAYS A YEAR? YES!

1. Thermal spas are very popular throughout the year
2. Medical tourism is soaring beyond the summer season



THREE STRATEGIC PRODUCTS OF HUNGARY WITH A 365-DAY SEASON:

- 1. Health tourism**
- 2. Cultural tourism**
- 3. MICE tourism**

THANK YOU FOR YOUR ATTENTION

