

# BASIC TRENDS AND NEW FORMS OF TOURISM IN HUNGARY

## 匈牙利觀光業的基本趨勢和新形式

László Puczko, PhD Candidate  
Tourism Research Centre  
Budapest University of Economic Sciences, Hungary  
拔斯高 (博士研究生)  
匈牙利百達柏斯經濟科學大學  
觀光業研究中心

世界觀光業專家預測中、東歐將會是未來世界觀光業發展最迅速的地區。預計到2010年這地區的旅遊業每年平均攀升百分之五。如果預測屬實，處於這地區的匈牙利，其觀光業前景可謂一片光明。本文作者籍著對中、東歐政治體系上的改變，經濟的發展，以及過去這地區各國在觀光業的表現作出研究和分析，從而導出未來匈牙利在觀光業上的新形貌。

### INTRODUCTION

You may know the following forecast by World Tourism Organization (WTO) experts:

... Central and Eastern Europe seems to be the world's fastest-growing region in the terms of travel, climbing 5% annually through 2010 - Hungary, located within this region, will have a bright future if we can believe what prediction made by WTO's experts. As a person promoting tourism in Hungary, we have a big job ahead of us.

As the twentieth century draws to a close, Central and Eastern Europe has become the world's fastest changing region. This change started a few years ago with "perestroika" and the incredible collapse of communism (so-called "existing socialism") and continued with the break up of the Soviet Union, abolition of the Warsaw Treaty and Comecon, the withdrawal of Soviet troops from the various countries in the region, and after many decades, the first free democratic elections. Unfortunately, the region is still marked by many tragedies, such as the war in the former Yugoslavia, heightened nationalism in various countries, a deepening economic crisis, high unemployment, rising inflation and increasing poverty throughout the region. The countries in the region are faced with a tough and insecure transitional period of which nobody can predict the final result.

The change in the region is expected to take more or less the same direction in all countries: mainly from a totalitarian, one-party system towards a pluralist democracy and from a centrally-controlled towards a free-market economy. After the collapse of communism, it is expected that capitalism will dominate this region but faces with special problems i.e. these countries have different backgrounds and systems than western countries, apart from global problems threatening the very survival of our civilization, such as the destruction of the environment, the widening gap between the haves and the have-nots and the depletion of energy and non-renewable resources.

Our world is becoming more global and interdependent, and if the problems are to be solved they cannot be regarded merely as internal problems of the region. If there are deep internal tensions, before a solution is found, they can foster conflict which may have a spillover effect on the whole continent and even the world. To prevent this, the efforts of the international community are needed to create a new world order which is more humane and understands the interests of the whole of gender, respects and conserves the natural environment and contributes more to the survival of our civilization. Many conventions will be needed. It would be ideal if the future of Central and Eastern Europe were to be integrated into this new world order.

The future of tourism in Central and Eastern Europe is not only of regional importance. In the short run, this region represents a new destination for tourists and investors from other regions, particularly Europe where many

tourist areas are suffering from saturation problems. In the long-run, tourism is expected to develop in the region, as well as between East and West, which also means new resources for world tourism. In this age of radical change, this region merits close attention.

Since there is a lack of information, and statistics available on the current situation of tourism in the region, it was also necessary to use field research techniques. The Tourism Research Center of the Budapest University of Economic Sciences, with the participation of its students and external experts, carried out a personal survey in January 1993 in certain CEE countries. Representatives from tourism authorities and 2-3 companies (among them are new travel agencies and boarding houses) as well as experts on the topic were asked to participate from each of the following countries: Czech Republic, Croatia, Poland, Lithuania, Hungary, Russia, Romania, Slovakia, Slovenia and Ukraine).

Tourism is in a transition period. Since the transition started in the region, the most important changes in tourism are the following:

- the income from domestic tourism has declined (since prices increased because of the reduction of state supported prices and wages did not increase in the same proportion. The discretionary incomes thus shrank or even disappeared. This income people try to balance between necessities and which of course in the end does not leave much for tourism).

- social tourism is declining (even the state and trade unions supported holiday resorts are receiving less contributions and price increases are unsupportable because of the impoverished state of people. Thus they are trying to convert more and more of these resorts into commercial hotels or do other things like privatise them or simply shut them down).

- organized tourist traffic between Eastern European countries has virtually disappeared from their international tourism (since they switched to convertible accounting but foreign exchange is still lacking or expensive, and if people can, they prefer to travel to the West) although in many areas there has been an increase of shopping tours (because of scarce goods in certain regions, for example, food supply, and advantages of black markets trading).

- tourism between the Eastern European and Western countries moderately increased in both directions. Once the transition began in the Eastern European countries, the liberalisation of travel had a positive effect. But travel from East to West was hindered by the low wages in Eastern European countries and the restricted sale of hard currencies. There were also many factors which prevented substantial growth of travel from West to East: recessions in Western countries, political instability in several CEE countries, the wars in former Yugoslavia and former Soviet Union, lack of services and infrastructures within tourism, insufficient marketing, etc.

## **I. BASIC TRENDS IN THE DEMAND OF TOURISM AFTER THE YEAR OF CHANGE**

### **INTRODUCTION**

During the transitional period the tourism of Eastern European countries so of Hungary had to face many new and unknown situations. The planned economy has been done away with, legal and organisational systems hardly worked in practice and new market relations have not yet been formed. An endless list of provisions and regulations was born, many of which tourism had to manoeuvre between. Since September 1989, the governments in Hungary and neighbouring countries have passed over 60 regulations (liberalisation or restriction) connected in some way with travel. Earlier years never saw such enormous changes in tourism with so many prohibitions and liberalisation having to be taken into consideration at the same time.



Increasing changes affected tourism basically from two points of view: from political and economic aspects. Governments supplied their citizens with world passport just before the change of regime in 1988 and onwards. Since then border crossings have been further simplified and today Hungarians have virtual freedom of travel. The obligatory visa system was abandoned after agreements with one European country after another. The earlier obligation of Western tourists to register at the police station was abolished, and administration related to travel and official formalities have generally been cut to a minimum.

Political moves were mainly taken in conjunction with financial considerations. In 1989, the supply of foreign exchange for travellers to Western countries and the customs regulations had to be tightened because of the excessive outflow (Table 1).

**INTERNATIONAL TOURISM BALANCE ( MILLION USD )** **TABLE 1.**

	1987	1988	1989	1990	1991	1992	1993	1994	1995(a)
Receipts	511	531.5	541.7	824	1,002.3	1,231	1,181	1,428	671.8
Expenditures	1582	549.6	947.1	476.5	442.8	640	741	925	637.4
Tourism balance	+352.8	-18.1	-405.4	+347.5	+559.5	+592	+440	+503	+34.4

Source: Central Statistical Office, Hungarian National Bank

Note: (a) = January-June 1995

Rouble-related tourism caused problems. From a financial point of view, business partners of Hungary were unable to pay their debts to Hungary in kind as they have promised. The exchange rate in black market was more desirable than the official rate partly because of the lack of Forint. After the change of regime East European governments' declaration of convertibility was made possible. Hence, from 1991 onwards, accounting between the countries was conducted on a convertible currency basis only.

In the period of transition, following events on the tourism market became ever more difficult. Official statistics and information are insufficient in many respects and - for example in the case of accommodation and finance - they are only able to cover the increasingly narrow proportion of the real processes.... Unfortunately the Hungarian Tourist Board (HTB) cannot provide accurate data on tourism flows.

## INTERNATIONAL TOURISM

Directly following the change of regime further active interest was shown in Hungary from abroad (Tables 2, 3/A, 3/B).

**INTERNATIONAL TOURISM, MAIN INDICATORS** **TABLE 2.**

	1985	1989	1990	1991	1993	1994	1995(a)
Tourists	9,724	14,490	20,510	21,859	22,804	21,425	8,580
Excursionists	2,104	5,641	10,670	7,074	11,719	13,026	6,464
Transit visitors	3,033	4,788	6,452	4,330	6,076	5,385	1,907
<b>Total</b>	<b>15,126</b>	<b>24,919</b>	<b>37,632</b>	<b>33,265</b>	<b>40,599</b>	<b>39,836</b>	<b>16,951</b>
<i>Foreign tourist nights</i>	<i>69,994</i>	<i>84,475</i>	<i>100,793</i>	<i>108,805</i>	<i>143,548</i>	<i>140,271</i>	<i>57,347</i>
<i>Hungarians travelling abroad</i>	<i>5,533</i>	<i>14,476</i>	<i>13,596</i>	<i>14,317</i>	<i>12,115</i>	<i>14,374</i>	<i>6,126</i>

Source: Central Statistical Office

Notes: (a) = Jan-June 1995



The number of foreign visitors increased strongly - in 1990, more visitors arrived than ever: 37 million. However, an analysis of guest traffic shows that it has lost its 'real tourist', holiday aspect: the mass nature, shopping motivated, low expenditure level and the high proportion of excursionists and transit travellers was typical mainly amongst those guests arriving from the East European countries. Tourists from countries with soft currencies were only able to obtain relatively low Forint allowances, and thus they were forced to change money on the black market or they covered their stay in Hungary from the income of products sold on the "COMECON markets". These "COMECON markets" became a typical characteristic for East European tourism and Central-Eastern European life. Since June 1995 it is not allowed for foreigners to sell any product in markets.

**INTERNATIONAL ARRIVALS BY COUNTRIES (IN 1000S)****TABLE 3/A**

	1985	1989	1990	1991	1993	1994	1995(a)
Austria	2,416	4,554	5,152	5,841	5,740	6,111	930
France	44	63	159	203	227	227	64
Germany	2,298	3,185	2,632	4,003	4,140	4,134	958
Italy	107	249	392	432	508	507	147
Netherland	55	184	169	250	294	306	80
Scandinavian countries	88	161	236	246	227	129(d)	38
Switzerland	51	79	97	145	161	169	56
United Kingdom	43	69	104	152	158	152	56
USA	76	160	219	189	252	254	94
<i>Sub-total</i>	<i>5,178</i>	<i>8,704</i>	<i>9,160</i>	<i>11,461</i>	<i>11,707</i>	<i>11,98</i>	<i>2,423</i>
Bulgaria	543	677	924	503	753	125	117
Czechoslovakia(b)	4,892	3,708	3,920	3,836	3,058	3,448	562
Yugoslavia(c)	1,710	4,416	8,123	5,175	13,715	12,723	1,380
Poland	3,085	4,480	3,790	2,549	754	676	171
Romania	386	235	9,014	6,825	6,698	5,206	1,642
Soviet Union/CIS	501	2,066	1,884	1,184	2,703	3,884	1,977
<i>Sub-total</i>	<i>11,117</i>	<i>15,582</i>	<i>27,655</i>	<i>20,072</i>	<i>27,681</i>	<i>26,062</i>	<i>5,849</i>
<b>Total</b>	<b>16,259</b>	<b>24,286</b>	<b>36,815</b>	<b>31,533</b>	<b>39,388</b>	<b>38,051</b>	<b>8,272</b>
<b>Tourist nights /1000/</b>	<b>70</b>	<b>84</b>	<b>100</b>	<b>108</b>	<b>143</b>	<b>140</b>	<b>57</b>
<b>of which Public Acc.</b>	<b>28</b>	<b>28</b>	<b>13</b>	<b>12</b>	<b>10</b>	<b>10</b>	<b>3</b>

Source: Central Statistical Office

Notes: (a) = Jan-June 1995; (b) = Czech and Slovak Rep. from 1993; (c) = Successors of former Yugoslavia from 1993 together; (d) = only Sweden

In 1991, for the first time in a long time, there was a decrease in incoming tourism (33 million visitors, 22 million tourists), while structural changes showed some favourable signs. East European traffic plummeted, in some cases by 60-70%, marking the retreat of shopping tourism, the change to convertible currency accounting and the restricting effects of the Yugoslav civil war. In addition, a 1991 Interior Ministry decree tightening up entry conditions for foreigners coming to Hungary, respectively a control on the quantity of currency considered sufficient for the stay in Hungary, caused a drop in traffic.

The decrease in tourism traffic - although at a more moderate rate - continued through 1992 (33 million visitors, 20 million tourists), with the tourist proportion improving. This year even the determinant Austrian and German incoming tourism has lessened, a sure sign of the recession in the Western countries. Unfortunately during the period of transition numbers of guests taking commercial accommodation has permanently decreased.

### INTERNATIONAL ARRIVALS BY COUNTRIES (IN 1000S)

TABLE 3/B

	Excursionists			Transit travellers		
	1989	1990	1993	1989	1990	1993
Austria	3,325	3,289	2,960	151	201	118
France	1	8	4	2	9	8
Germany	65	244	257	362	393	315
Italy	4	27	15	5	33	93
Netherlands	3	12	7	3	13	18
Scandinavian countries	4	20	3	8	22	14
Switzerland	2	9	8	1	5	7
USA	12	23	5	3	15	10
<i>Sub-total</i>	<i>3,418</i>	<i>3,638</i>	<i>3,262</i>	<i>529</i>	<i>700</i>	<i>591</i>
Bulgaria	10	25	8	358	437	304
Czechoslovakia,b	373	913	1,287	954	711	196
Yugoslavia,c	1,692	4,364	6,242	1,341	1,972	3,855
Poland	72	158	36	1,018	890	108
Romania	4	1,449	719	106	1,213	636
Soviet Union/CIS	32	47	139	408	37	68
<i>Sub-total</i>	<i>2,183</i>	<i>6,956</i>	<i>8,431</i>	<i>4,185</i>	<i>5,595</i>	<i>5,167</i>
<i>Others</i>	<i>40</i>	<i>75</i>	<i>25</i>	<i>73</i>	<i>156</i>	<i>316</i>
<b>Total</b>	<b>5,641</b>	<b>10,669</b>	<b>11,718</b>	<b>4,787</b>	<b>6,451</b>	<b>6,075</b>

Source: Central Statistical Office

The total number of international tourism peaked in 1993, mounting 40,599 visitors. A little bit more of 50% were tourists only. Since 1990 we can see an intense grow of visitor-numbers from the CIS, the successors of former Yugoslavia (Croatia, Slovenia, Serbia) and Romania. In case of Poland - the other way around. Table 3/B shows that visitors from the former Yugoslavia have a three-fourth share from the total non-tourist numbers. These people are "trading" or are refugees in a way. They are not tourists at all. Excursionists and transit travellers are dominantly originated from Central European countries. Only Austria because its close location had fewer tourists than other visitors. There is no secure reason for this but in the Western counties of Hungary significant number of retailers, service establishments, etc. have enjoyed these visits i.e. great difference between the two countries' price levels.

After the reunification of Germany, still-high number of visitors are coming. One could be afraid of losing German tourists, because meeting families and friends was no longer the reason for going to Hungary. Although over 4 million German visited Hungary in 1994, it still show slight decrease especially in the case of Lake Balaton.

In the last couple of years Hungarian tourism has had to take on the extra obstacles originating from the location of the country and the proximity to the south Slav war. The country has acted beyond its real economic capacity as regards refugees arriving from Romania and the territory of former Yugoslavia. Northwest-Southeast European transit traffic has been directed to Hungary because of the civil war, sometimes causing severe blockages at border crossings.

Tourist nights spent in public accommodation holds its share, but comparing the data of 1986 and 1994 there is almost a two-third decrease. The peak was in 1993, numbers decreased by 1994. (Tables 3/A; 3/B;3/C)

#### **RANK OF COUNTRIES, 1994**

**TABLE 3/C**

<i>As of visitors</i>	<i>As of tourists</i>	<i>As of nights in public acc.</i>
1. Yugoslavia/Croatia	1. Romania	1. Germany
2. Austria	2. Germany	2. Austria
3. Romania	3. CIS	3. Netherlands
4. Germany	4. Austria	4. CIS
5. CIS	5. Yugoslavia/Croatia	5. Italy

Source: Central Statistical Office

We can see contrasts in Table 4. Number of units in different types of public accommodation have increased significantly whilst bedplaces and foreign nights have decreased. Of total nights spent by foreigners only less than 10% registered in public accommodation. The reason is complex. Small tourist enterprises have been launched with fewer beds which I should call your attention to the extreme drop of tourist private bedplaces. The real situation suppose is not that bad.



## CAPACITY OF ACCOMMODATION ESTABLISHMENTS

TABLE 4.

Type of accommodation	1988			1994		
	units	bedplaces nights (1000)	foreign	units	bedplaces nights (1000)	foreign
Hotels of which	282	51,533	6,029	542	85,605	6,341
five stars	4	2,489	462	4	2,642	438
four stars	8,347	1,487	19	9,222	1,399	2,870
three stars	50	16,398	2,325	184	33,868	2,870
two stars	110	13,110	1,252	185	23,100	1,193
one star	110	11,189	501	150	16,773	441
Boarding houses	156	13,890	330	799	28,646	546
Tourist hostels	95	9,667	210	128	12,036	229
Bungalows	153	11,717	493	276	15,333	351
Camping	149	87,862	3,868	282	105,771	2,130
Private rooms	N/A.	145,943	4,965	9,081	41,229	940
<b>Public accommodation</b>	<b>835</b>	<b>320,612</b>	<b>15,896</b>	<b>11,108</b>	<b>288,620</b>	<b>10,536</b>

Source: Central Statistical Office

It is rather interesting the sharp drop in the official number of private rooms. Especially in the most visited places e.g. Lake Balaton there are private rooms for rent, but not registered officially because of taxation reasons. There are no set standards for private accommodation. In order to get hard cash, every single room is being rented out without acceptable standards. This situation need to be handled quickly.

Items of January-June 1995 can be a matter of interest. The reason for unbalanced data is the high seasonality of Hungary's tourism. The high season at Lake Balaton starts usually mid-June or 1 July and lasts by mid August. The Lake dominates the numbers in case of camping-sites and private houses.

### HUNGARIANS TRAVELLING ABROAD

The increase in the number of Hungarians travelling abroad illustrates their greater travel freedom and need motivation and capability of travelling. Departures reached their peak in 1989 (14 million), although the increase was clearly linked to shopping tourism in Austria. The number of outgoing travels remains high, although it has levelled off somewhat. Departures almost reached the top in 1994 again, but it did not mean simple shopping-tours - recreation is the main motivation (Table 2).

### DOMESTIC TOURISM

The period of transition recorded a significant drop in domestic tourism. The disposable income and spare time of the population have fallen sharply. Hungarian tourists have been increasingly edged out of domestic



commercial accommodation because of the increasing rates, the decreasing solvent demand and the inflexibility of supply. Youth and trade union holidays have considerably decreased following major cutbacks in state subsidies. The whole system of social tourism is undergoing transformation; the former trade union resort houses were taken over by the National Resort Fund in 1992.

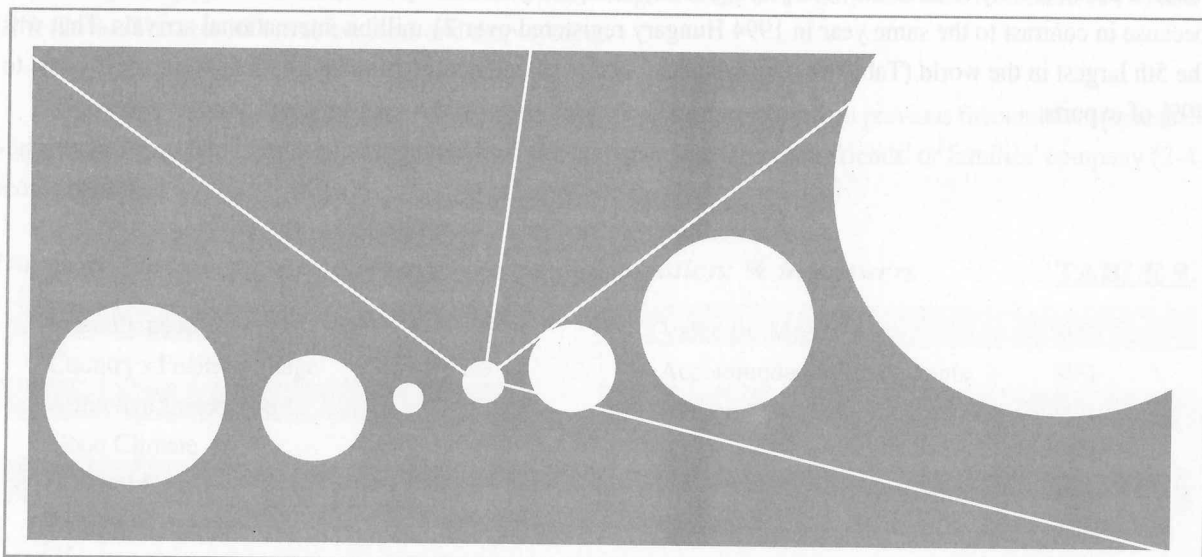
In the light of data in Table 5 and Table 6 it is clear that the number of domestic tourists does not show intense decrease but the number of tourist nights does decrease very much. The still-high inflation level over 20% for 5 years, more than 10% unemployment level and a drastic drop in disposable income made domestic travel almost as expensive as international travel. The price level of services topped the average or more as in Western Europe so people who have disposable income to spend on holiday can choose a foreign destination for almost the same price. In 1993 the total number of domestic tourists was 2,107,000 while Hungarians crossed the borders 12,115,000 times. This share is not the case for well developed countries. Domestic tourism has bigger share than outgoing travel in these countries.

## DOMESTIC TOURISM

**TABLE 5.**

	1986	1989	1990	1993	1994
Hotel	895	776	752	1,056	1,211
Boarding house	312	273	235	372	386
Tourist hotel	281	257	176	165	183
Bungalows	272	234	204	171	194
Camping sites	320	258	237	195	185
Private rooms	581	467	354	145	124
Other public acc.	1,769	1,492	1,208	1,050	1,072
Total	2,665	2,268	1,961	2,107	2,283

Source: Central Statistical Office





**Number of domestic tourist nights (1000s)****Table 6.**

	1986	1989	1990	1993	1994
Hotel	1,620	1,452	1,375	2,404	2,927
Boarding house	599	569	459	808	926
Tourist hotel	547	510	310	412	465
Bungalows	525	471	407	386	453
Camping sites	1,180	965	850	637	615
Private rooms	8,645	7,432	5,364	1,532	1,051
Other public acc.	11,498	9,949	7,392	3,778	3,510
Total	13,119	11,402	8,768	6,183	6,438

Source: Central Statistical Office

Regarding guest nights in registered commercial accommodation, foreign tourism (at 64%) is more important than domestic sources. Business in higher standard hotels has decreased to a lesser degree. A significant part of the demand has moved to the private sector, where an increase in supply to meet demand, prices and regulations (taxation) have all had a role.

## ROLE OF TOURISM IN THE ECONOMY

National income from tourism rocketed in the 80s, while by 1991 state official income from this sector added up to USD 1 billion, and USD 1.1 billion in 1992 (Table 1). Total tourism income including income going direct to the population can be estimated at about USD 2.5 billion. The economy is linked very much to tourism. It balances payment closer to the red line - from down to up. Officially central budget draws HUF10 of every HUF100 from tourism i.e. three times the average in EU countries. In the means of GDP amounts, tourism has a share of 3.38% (1994). In 1994 the tourism receipts mounted 1.4bn USD. It should add that regarding Mr Schagrin, head of HTB, the economy received ca 400m USD extra through the unrecorded grey sector. This total 1.4.bn made it possible only to have the 40th place globally comparing our 56th place in 1985. It sounds a little bit sad because in contrast to the same year in 1994 Hungary registered over 21 million international arrivals. That was the 5th largest in the world.(Table 8). Governmental and personal income from international tourism is equal to 40% of exports.

**TABLE 8.**

World rankings by tourism earnings, 1994

	1985	1994	1994 receipts (bn USD)
United States	1	1	57.10
France	4	2	25.0
Austria	6	6	13.15
Poland	74	15	6.15
<b>Hungary</b>	<b>56</b>	<b>40</b>	<b>1.44</b>

World rankings by tourist arrivals, 1994

	1985	1994	1994 arrivals (million)
United States	1	1	60.64
France	3	2	46.43
Austria	5	8	17.89
Poland	22	9	17.6
<b>Hungary</b>	<b>11</b>	<b>5</b>	<b>21.43</b>

Source: Business Central Europe, WTO

The introduction of the world passport was accompanied by a relaxed foreign currency supply for Hungarians in 1988-89. There was a deficit in the balance of tourism in 1989 (Table 1) due to the liberalisation of outgoing trips and parallel with this customs modifications were neglected for a long time. This directed attention to the fact that the balance of tourism is extremely unstable and closely related to the foreign currency and product supply of the population. With the introduction of stricter provisions the negative trend was turned round from 1990. The improving financial balance has already made it possible to give Hungarian citizens travelling abroad an increased amount of convertible currency. The government is on to increase the legal limit of hard currency for travelling i.e. 800 USD now, from January 1996 by making Forint convertible.

### MEETING THE DEMAND - MOTIVATION OF TOURISTS

Hungary's participation in the world's tourism is characterised by large visitor and tourist numbers and relatively modest benefits as we could see. This is partly due to the visitor mix (over 50% of arrivals originate in Romania, the former Yugoslavia and CIS) and to the predominance of low cost, private accommodation - an important part of which is operating as grey business.

In the summer of 1993, the HTB carried out a survey asking 3400 tourists nation-wide on their motivations of choosing Hungary as a destination. It was found that foreign tourists' main purposes were recreation (64%) and VFR (26%). The rest 10% was business and employment.

The results showed that almost two-thirds of tourists chose Hungary based on previous favourable experience. Majority of trips were organised individually and the tourists came with their friends' or families' company (2-4 people together).

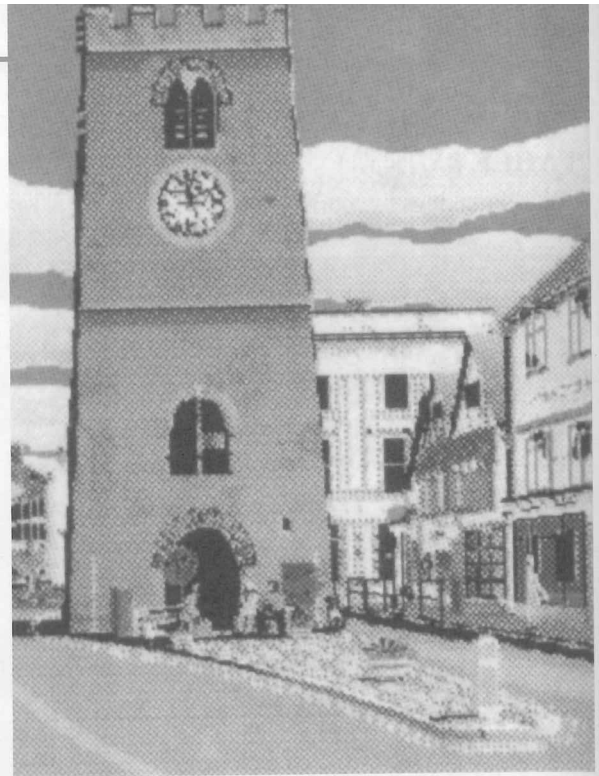
*The most important criteria when choosing a destination: % in answers*

**TABLE 9.**

Friendly people	100%	Value for Money Acc.	89%
Country's Positive Image	92%	Accommodation/Restaurants	89%
Attractive Landscape	89%	Favourable Prices	89%
Good Climate	89%	Shopping Facilities	89%
Cultural Events	84%	Good Lodging at a Good Price	89%
Folklore/Traditions	84%	Safe Environment	84%

**TABLE 10.**  
*Main attraction factors of Hungary (max: 5)*

Budapest	4.7
Friendly People	4.2
Spas, Health Serv.	4.1
Favourable Price/Value Ratio	4.1
Cultural Events	4.0
General Attractiveness	4.0
Low Prices	3.9
Quality of Supply	3.9
Safe Environment	3.9
Cuisine	3.9
Puszta	3.6
Novelty	3.3
Lake Balaton	3.1



Tourists were asked to mention what would be the most important criteria for choosing a destination (Table 9). They were also asked to indicate the main attraction factors of visiting Hungary (Table 10)..

These answers remind us that we have to offer other attractions and we should motivate people to come here from favourable price level. This "advantage" has almost overpassed by now i.e. the average price level in Hungary is almost the same as in EU, but tourists especially paying with DM can get more in value than their home country for the same amount of money (1DM is ca. 1.3DM in Hungary).

Exclusive tourism rests on the new tendency observed in the developed countries whereby populations increasingly take paid holiday in several parts, and as a result the summer mass migration directed towards the seashore (in Europe and the Mediterranean shore) is less intense; rather there are complementary second, third and fourth holidays in the year and extended weekend breaks when the tourists' choice is already based on specific ideas, as, for example, winter and other sports, hobbies, travel as a means of gaining experiences, health reasons, adventure, friend and business relations, religious reasons, etc. Hungary cannot compete with the Mediterranean, but this new direction has suitable attractions or they can be developed, to act as the springboard for exclusive tourism. The most specific attractions are spas, Hungarian culture (music, art, architecture, towns and villages, gastronomy, wine, etc.), natural resources (Hortobágy, the other national parks, forests, lakes, etc.) and family relations (emigration, the Hungarian minorities), riding, fishing and other competition sports which are competitive internationally or can be made so. Considering the openness of the economy and the increasingly significant international relations in all areas, the different forms of official tourism (business, convention and incentive tourism) also provide long-term perspectives.

## II. NEW FORMS OF TOURISM IN HUNGARY

As we could see that we have received rather huge number of visitors now, but we have to offer new types of attractions, programmes to keep our guests and attract new ones. Materialise this such as in other countries entrepreneurs are looking for specialities. New tourism forms are gaining bigger and bigger importance both in international and domestic tourism. Mentioning examples: ecotourism, soft-tourism, rural tourism, green tourism, cultural tourism, etc.

Being more environmental conscious we should develop those products which are not damaging the natural and built environment so stand here some new form as good examples. Our Research Centre is paying more and more attention towards environmental issues. These are forms especially for niche markets providing something unusual or unique in contrast to mass tourism. There are 25 national tourist offices operating outside the capital trying to strengthen the countryside and the lessen the dominance of tourist concentration in the capital.

## CURE-TOUR

### **There is a quite interesting new mixed-way of relaxation and cure:**

A travel agency formed by The Association of Natural Physicians organises a cure-tour consisting of the following elements:

- curing horse-riding for people suffering from scoliosis
- trips showing medicinal herbs and familiarising with the possible use of them
- traditional Chinese methods of medical treatments
- bio-foods
- cave-cure for people suffering from hay-fever
- curing methods for giving up smoking

They had expected more foreign tourists as domestic, but by now it come up on the other way around. The accommodation is in private houses or village farmhouses.

## RURAL TOURISM

Recently regarding to The Hungarian Association of Village Farmhouses (AVF), the number of hosts providing such facilities are unknown but I should add that the most of them are not willing to join any organisation because they are afraid of being registered for APEH (Tax and Financial Controlling Bureau) and disappointed in fakers. The number of registered village farmhouses was 414 in 1990. A nation-wide association should be formed since there are at least 2 different associations using almost the same names and carrying the same aims and functions.

The AVF is a joint partner of EUROGITES. This organisation represents the national associations of farmhouses. EUROGITES supports the formulation of inter-European standard and category system for village farmhouses. It can help for tourists receiving the same quality everywhere and guiding and controlling hosts.

The AVF would like to introduce the European standards to the Hungarian village houses. There are three successful villages providing village accommodation services, one of them is Magyarpolány located close to Lake Balaton within Bakony hills. It is a rather small village with only 1250 residents, but it has the only original so called 'Bakony-type street' with 42 houses. These buildings have saved the special design of houses of the Bakony region. They have revitalised buildings into "living houses" so who is willing to spend a few days there can milk or dig in the garden or practice some local handicrafts. As recognition their results the Europa-Nostra prize has being donated to them in 1992 - it was the first time in Europe that a village received this award.

The Hungarian Tourist Board has conducted a survey within Hungarians on their intentions of making a rural holiday. The sample consisted of 1658 responses from questionnaires in 1993 asking on the planned activities. It shows that people like hiking, visiting cultural and heritage attractions, taking sports, making pottery etc. and, most popular, relaxing in a quiet place. They would travel to that place preferably by car and mostly in weekends for 4-8 days maximum. The demand would be the biggest in summertime and rather low in winter. Rural travellers prefer going with family and/or friends than going alone. They intend to do rural activities and may even lessen their town-like needs of comfort. Further data shows that parents would pay a rural holiday for kids aged between 10-14 if somebodies, schools or friends organise the trip.





## **HORSES - The First World Festival of Distance and Trekking Riders, Sept. 10-24, 1996**

**The First World Festival of Distance and Trekking Riders** aims to arouse all the horse-lovers' interest around the world. As an official programme of the National Celebration of the 1100th Anniversary of the Hungarian State it targets 2000 riders and expects ca.35-45,000 guests plus Hungarian visitors ca 100,000-150,000. For this two week event, participants are going to visit Hungary from around 107 countries of the world. They will be accommodated in approximately 250 riding inns throughout the country. From different parts of the country riders set up for the adventures journey to Kecskemét. There will be programmes for non-riding horse lovers as veterinary conference or conference for horse trainers, Horse and Horse-Equipment Fair, The Horse Promenade and Horse-Show. There is going to be an extraordinary contest, namely Equissimus, the "Choice of The Most Beautiful Horse" in different categories.

This would be the first step to call Hungarians' attention to the proposed role of horses in domestic tourism. As a base it is a trial to bring horse-riding into the obligatory sport programmes of primary and secondary schools - hoping that these students are going to be the future domestic demand for horse-riding development.

### **ADVENTURE TOURISM**

There is a travel agency - Nomad Safari Travel Agency - organises outgoing tours to Africa: Kenya, Tanzania, and Botswana, USA, South America, Europe as real possibility for living as what our predecessors did such as living in tents, and doing canoeing and hiking in a "wild" place.

Not just outgoing, but we can also offer this kind of activities especially for kids aged up to 14-16 years. Kids from towns can have the opportunity to see, touch, and try what they have learned from book or seen on TV about flora, fauna and life on the countryside. This kid-safari is built on tents and activities such as bird watching, bonfire, hill-climbing, photo-taking, canoeing, picking of herbs, basic foods cooking etc.

Foreign visitors - if they are British - can choose Hungary as a place for an adventure travel by Explore World-wide Tour Operator. This agency organises trips to North-Hungary by providing the possibilities of horse riding, canoeing, cave visiting, hiking, etc. This is a 10 day trip in small groups up to 14 people.

Plans for launching new routes are under examination as to Bakony hills and interestingly adventure tourism to Budapest. The latter sounds strange but is possible in future. Future visitors wishing to participate in adventure activities can glide, make canoe trips and even playing bungee jump on Danube bridges! It is possible to have horse riding in the surrounding forests, and other activities like cross-country cycling, visiting caves, and photo-trips. The organisers can also build facilities for birdwatching.

### **AGRICULTURAL TOURISM - Working Weekends on Organic Farms**

This kind of tourism is created for people who would like to spend their weekends. This programme is organised and the biofarms is run by Bioculture Foundation and Gödöllő Agriculture University. It is rather well known within students who are willing to be farmers or to have job in the agriculture sector and not just in Hungary. They should work hard by doing everything is needed around the farm.

## WINE - Route of wine

Well-known vineyards of Hungary have gained high reputation world-wide among wine-lovers. There is a possibility in co-operating with other for attracting people to participate in different stages of the wine making process from picking of grapes to bottling their own bottle of wine. Vineyards would like to organise the so called 'Route of Wine' for participants to visit all the main vineyards in 14 wine-regions of the country. Activities like tasting wines, living in the countryside etc. would be a real active holiday for participants.

## CONCLUSIONS

The present article highlights the main trends and future forms of tourism in Hungary. Hungary has complex resource-structure that can respond to changes and demand. It is important to promote and support more environmental conscious forms of tourism and educate both local people and visitors on this aspect.

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