

1-1-2006

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Recommended Citation

Lupson, Sara, "Hungarian Tourism: At a Crossroad" (2006). *Transformation in post-communist Hungary*. Paper 7.
<http://preserve.lehigh.edu/perspectives-v24/7>

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HUNGARIAN TOURISM: AT A CROSSROAD

Sara Lupson



Introduction

Since the fall of the Iron Curtain, tourism has played a vital role in Hungary's growing economy. According to the World Travel & Tourism Council (WTTC), tourism in Hungary accounted for 9.3 percent of the total GDP and 8.9 percent of total employment in 2005. ("Hungary Travel & Tourism...", p. 3) Additionally, tourism is a profitable sector of Hungary's economy, instrumental in covering 73.9 percent of Hungary's 2002 foreign trade deficit. ("Tourism in Hungary, 1990-2002," p. 2) Thus, it is not surprising that the Hungarian government seeks to improve all forms of tourism and make Hungary the spa and convention center of Europe. ("The Shortened Version...") However, Hungary still has a long road ahead to becoming the tourism "Queen of the Danube."

While the tourism industry bolsters the Hungarian economy, Hungary is not fully taking advantage of the world's propensity to travel. The Czech Republic, whose transitional state

puts it in a situation similar to that of Hungary, is expected to reap roughly \$9.44 billion more than Hungary in tourism-related economic activity in 2005. ("Czech Republic Travel & Tourism...", p. 3) The Czech Republic's higher level of tourism revenue comes as a surprise since Hungary received roughly twice as many international visitors in 2004. ("Tourism Highlights: 2005 Edition," p. 6) This is indicative of many shortcomings of Hungary's tourism industry.

In this article I survey the international tourism industry of Hungary to provide better insight into the industry's potential as a larger economic influence. I review the history of tourism in Hungary as well as specific sectors of tourism, namely business, cultural, health-and-wellness, and wine tourism, that I feel have the ability to flourish. I then examine the current efforts of Hungary to become a highly-frequented tourist destination and provide ideas to possibly aid Hungary in capitalizing on its potential to become a tourism hub of Europe.

A History of Hungary's Tourism Industry

Hungary experienced travel and tourism as early as 9 BC when Roman occupation brought improvements in transportation, economic growth, and a strong tradition of leisure tourism. (Rátz, pp. 14–18) After the Middle Ages, travel and tourism were rekindled during the 16th to 19th centuries by improvements and developments in transportation such as the invention of the stagecoach, improved roads, and later the development of the railway. The new speed, ease, and relative affordability of travel encouraged the middle class to tour Europe en masse, resulting in the rise of a substantial tourism industry. Hungary, in particular, developed a strong bath and spa tradition as such towns as Hévíz became prominent destinations for those seeking health benefits. (Rátz, pp. 15–20)

In the mid-19th century, Budapest's role as a capital in the Austro-Hungarian Empire prompted growth in both business and cultural tourism. Tourism was halted, however, by World War I and then again by World War II. The conclusion of the Second World War left Hungary behind the Iron Curtain, cutting off all tourism from the West. Under communist rule, leisure tourism was viewed as a dangerous luxury and thus discouraged. However, the state did offer the opportunity for citizens to travel within a state-owned network of holiday resorts. Travel from one socialist bloc country to another was available, though monitored. As a result, domestic tourism became very important in Hungary. Mountainside and lakeside resorts in the Lake Balaton and Lake Tisza regions became frequent tourist destinations. While domestic tourism was at very high levels, it was strictly controlled by the government, thus limiting its role as an economic asset. (Kiss, pp. 103–104)

After the fall of the Iron Curtain in 1989, the socialist bloc countries transitioned to market economies. As a result Western tourists, long denied access, flooded into Hungary. The consequent flow of money aided Hungary's fledgling market economy. Despite a marked decrease in international interest in the former socialist bloc countries as the West's infatua-

tion faded in the second half of the 1990s, tourism continued to grow in Hungary. By 2001, the WTTC attributed 10.9 percent of employment in Hungary to tourism. (Kiss, p. 105) The growth in Hungary's tourism industry was halted in 2001 when the global tourism industry was shaken by the terrorist attacks of September 11th, the war in Iraq, and the SARS outbreak. Only recently has tourism in Hungary returned to the levels of growth experienced prior to September 2001. The recovery of tourism worldwide and Hungary's accession to the European Union in May 2004 present Hungary with the opportunity to further strengthen its tourism industry. Opportunities to draw international tourists are most prevalent in the areas of business tourism, cultural tourism, health tourism, and wine tourism. Each of these areas of tourism will be discussed in the following sections.

Hungary's Potential Moneymakers

Business Tourism

One potential area of growth for Hungary is in business tourism, frequently referred to as the "MICE industry" (meetings, incentive tourism¹, conferences, and exhibitions). While this form of tourism has existed since the early 19th century, during the 1960s the MICE industry began to develop into the economic force it is today. (Kiss, p. 91) One reason behind this economic force is the business tourism industry's relative independence from the weather. Business tourists are more likely to travel in the traditional tourist off-season, thereby creating a more stable industry. While all forms of business tourism are beneficial, Hungary currently focuses on drawing conference tourists, as this is the larger moneymaker. Conference tourism generates higher revenue because these tourists generally stay longer and spend more than other types of tourists. ("Tourism in Hungary 2004," p. 46) Conference tourism is also indirectly responsible for growth in other areas of the economy. The reason is that lead-

¹Incentive tourism refers to the practice of companies offering travel products such as cruises or retreats to their employees as an incentive for good performance.

ing professionals attending the conferences often help to bring new technology, ideas, and connections in their areas of expertise to the host country's industry. ("Tourism in Hungary 2004," p. 46)

Hungary's success in the MICE market has been mixed, however, according to data generated by the International Congress and Convention Association (ICCA). Hungary ranked 14th in 1996 on the list of popular convention countries, while Budapest ranked 3rd among cities. However, in 2004 Hungary sank to 19th and Budapest to 9th. (Kiss, p. 94) While private investors and the government pour money into the MICE industry to expand hotels, conference halls, and supplementary infrastructure, the industry's growth seems to be slowing. This may be due to a decline in Hungary's ability to offer tourists good value for their money. As Hungary strives to strengthen the forint in order to join the European Monetary Union (EMU), tourists find that their money does not go as far in Hungary as it once did. Since the MICE industry is sensitive to this, Hungary must fight hard to prevent additional decline in the industry. Moreover, the ICCA reported a recent decline in MICE tourism worldwide. This global decline, coupled with Hungary's reduced popularity as a conference destination, has cast a shadow on the country's most potentially lucrative form of tourism.

Still, the Hungarian National Tourist Office (HNTO) remains hopeful about Budapest's future prospects as a MICE tourism destination. The HNTO continues to focus its efforts on improving conference tourism in Hungary. It has noted that the drop in conference tourism was accompanied by several positive changes in the tourism climate. These positive changes included an increase in the number of countries sending tourists to Hungary and an increase in the average length of stay. ("Tourism in Hungary 2004," p. 47) These data provide reason to believe MICE tourism could be strengthened in Hungary with appropriate management and funding.

Cultural Tourism

Cultural tourism is a mainstay of the tourism industry. Europe benefits from well-

preserved relics of its rich history that draw many tourists from within and outside Europe who wish to expand their cultural horizons. Budapest's castle district, grandiose architecture, museums, and opera scene all help Hungary draw these tourists to Budapest. In addition, many annual cultural events, folk music events, and craft fairs also draw tourists to Hungary. With the abundance of these cultural attractions, Budapest should be a prime destination for the cultural tourist.

However, Hungary's success as a cultural tourist destination is somewhat unclear. Typical tourism indicators do not distinguish cultural tourists from other types of tourists, making it difficult to assess the health of the cultural tourism industry. Still, most tourists, regardless of their motivation for the trip, engage in basic cultural tourist activities such as sight-seeing. Thus, some statistics, such as the number of international visitors entering Hungary (international arrivals), may be good indicators of the industry's health. According to the 2005 World Tourism Organization (WTO) data, Hungary attracted 2.9 percent of all international arrivals in Europe in 2004. ("Tourism Highlights: 2005 Edition," p. 6) Hungary's numbers actually exceeded those of the Czech Republic, which claimed only 1.5 percent of international arrivals in Europe. Additionally, Hungary's 2.9 percent ranked closely behind those of Germany and Austria, traditional tourist "heavy-hitters," which accounted for 4.8 percent and 4.7 percent of the international arrivals in Europe respectively. Another positive indicator of cultural tourism is the number of nights spent in Hungary by tourists (guest nights). Since the recovery of the tourism industry following 2001, there has been significant growth in the number of guest nights in Budapest. Guest nights in Budapest exceeded 6 million for the first time showing a growth of 16.9 percent in 2004 from the previous year. ("Tourism in Budapest...", p. 8) The aforementioned statistics are suggestive of a healthy cultural tourism industry. However, Hungary's relatively high inflow of tourists does not generate proportional revenues. Hungary claims only 1.2 percent of international tourist receipts for the European market, a percentage less than that of the Czech Republic, despite

receiving almost twice as many international visitors in 2004. (“Tourism Highlights: 2005 Edition,” p. 6)

While Hungary has the opportunity to be successful in business and cultural tourism, many countries have similar opportunities and compete with Hungary for their share of these markets. Finding a niche specific to Hungary’s many assets would help reduce this competition and create a larger draw for tourists. For example, while Lake Balaton has traditionally been a prime destination for sun and beach tourism, it now has a difficult time competing with Mediterranean Europe for international tourists in this category. Hungary, however, is uniquely positioned to claim prominent positions in the sectors of health-and-wellness tourism and wine tourism, both of which are discussed below.

Health-and-Wellness Tourism

In recent years, the increased interest in health and the quality of life has resulted in the development of health-and-wellness tourism (HWT). These tourists travel to a location to regain their health or participate in activities that purport to maintain good health. Health-and-wellness destinations most notably include those with medicinal waters and spas. Fortunately, Hungary has a wealth of these commodities and a well-established tradition of spas. A total of 1,289 hot springs and spas possessing thermal or medicinal waters can be found in 385 settlements. (“Tourism in Hungary 2004,” p. 45) Thirty-eight locations boast medicinal baths, and Hungary can also take advantage of its five therapeutic caves, 81 sources of mineral water, and four deposits of therapeutic mud. With these unique assets and Hungary’s long-standing tradition of spas and wellness activities, a prominent spot in the modern health-and-wellness tourism industry may be attainable.

The potential benefits of a large HWT industry make investment in the industry well worth the effort. These tourists usually stay longer, spend more on services, and make more return visits. Additionally, demand for this type of tourism shows little seasonality. HWT also has the benefit of drawing many domestic

tourists. With their increase in expendable income, Hungarians are participating more frequently in HWT within the country. Drawing both international and domestic tourists and thus generating large receipts, an expanded HWT industry could be an important component of Hungary’s economy.

The HWT industry has already seen significant development. The number of international guest nights spent in spa hotels and wellness hotels increased 5.7 percent and 18.8 percent, respectively, in 2004 and 2005. (“Tourism: January–December 2005,” p. 6) To match this increased demand, Hungary has expanded its HWT industry infrastructure. Hungary now has 59 spa hotels offering a wide variety of services, and wellness hotel capacity also continues to grow. In 2005 Hungary reported an increase of 47.3 percent in wellness hotel guest capacity. Should global interest in HWT continue to grow, Hungary has the opportunity to distinguish itself in this lucrative sector of tourism. However, the future of the health-and-wellness trend is uncertain. While the Hungarian government’s goal is to become a major European spa center, should the industry lose steam, Hungary could be left with many costly renovated, but unfilled, spa hotels.

Wine Tourism

The rich tradition of winemaking has held a central role in Hungarian culture for more than a thousand years. There are currently 22 wine regions, many producing wines unique to Hungary. Prior to communism, these Hungarian wines were prominent throughout Europe, with Tokaj even gracing the tables of Louis XIV at Versailles. (Friedrich) However, the nationalization of Hungary’s vineyards and the mass production of wine, enforced by the communist regime, disrupted the unique methods of Hungarian winemakers and diminished the quality of their wines. With a return to a market economy, Hungary has the opportunity to redevelop the industry and reclaim its past glory. The wine industry has been privatized and is now meeting European production standards. Already the best Hungarian wines are considered by some to be in the same class as those of Germany and France. (Mészáros)

Despite the quality of the wine, weak marketing has kept Hungary from the forefront of the wine market thus far. (Mészáros)

Developing a stronger presence in the wine industry would allow Hungary to improve wine tourism with significant benefit to the country. Wine tourists, who travel leisurely with the intent of experiencing local culture through sampling traditional wines, are likely to spend more time and money in the host country. Additionally, these tourists travel the countryside, thus bringing revenue to more rural areas. This could help Hungary close the income gap between rural and urban areas. Finally, since wine is so closely intertwined with Hungarian culture, investing in wine tourism development is also an investment in the preservation of Hungarian culture.

Some promising developments have recently been seen in this industry. Tourism professionals frequently offer wine tours and cruises to wine tourists. The number of wine tourists often exceeds the number of available accommodations. (Smyth) While this indicates an existing interest in Hungarian wine culture, it also demonstrates the need for Hungary to further develop the capacity of this industry. Despite the wine industry's anticipated aid from EU subsidies of €10 million in 2004, both the wine industry and the wine tourism industry are in need of still further funding. Little government funding has been earmarked for marketing, which when combined with high taxes on exporting wine has caused the Hungarian wine industry to suffer in the international market. (Schweizer) While an improved position in the wine market would attract more wine tourists, better funding for improved roadways and increased accommodations would enable Hungary to better capitalize on the current interest in wine tourism.

Hungary Strives to Advance Tourism

A Change in Government Structure

In its effort to promote a healthy tourism industry, Parliament has revamped the organization of the tourism sector several times. The current structure places the Minister without

Portfolio in Charge of Regional Development and Convergence² at the head of the government's tourism sector. Several bodies report to and assist the Minister. The Hungarian Tourist Authority (HTA), an administrative body created in January 2005, operates as an independent legal entity. Responsible for the development and fulfillment of the National Tourism Development Strategy, the HTA monitors industry growth and acts as a liaison with the European Union and various international tourism organizations. The National Tourism Board (NTB), comprised of representatives from major trade organizations, acts as a consultant to the Minister without Portfolio, submitting proposals to improve the tourism industry. The Hungarian National Tourist Office (HNTO) is responsible for all marketing of Hungary's tourism industry and for ensuring cooperation between the different regions of Hungary. Finally, Parliament plays the most vital role in the tourism industry, passing all acts that lay the framework for the industry's success or failure.

Promoting Hungary

A country must have effective market access and promotion to create a healthy and sustainable tourism industry. ("Making Tourism More Sustainable...", p. 26) Hungary's main marketing body, the HNTO, currently has representation attempting to market Hungary as a prime tourist destination in over 20 countries. ("Tourism in Hungary 2004," p. 71) Many countries with high numbers of Hungary-bound tourists are Eastern European, indicating that Hungary has relatively good market access in that region. Unfortunately, tourists from these generally less affluent countries are unlikely to spend as much money as Western Europeans and may account for Hungary's disproportionately small tourism revenue. This is not to say that Hungary does not attract tourists from Western Europe. The HNTO has good representation in the Austria-Germany region, which is reflected in high numbers of tourists from these countries. An increase has also been noted

²A Minister without Portfolio refers to a government position with no specific responsibilities or ministry to head.

in the number of nights tourist spent in Hungary (guest nights) from the U.K., France and Italy, corresponding to the HNTO's presence in EU member states.

Hungary's 2004 Marketing Plan reflects a push to reach more affluent source markets. Hungary's accession to the EU in May 2004 provided the perfect opportunity to improve Hungary's image and reach Western Europe. To highlight this accession and affirm Hungary as a European nation, one campaign featured Miss Europe 2003, Hungarian Zsuzsanna Laky, wearing her crown and sash with the words "One of Us" proudly displayed. Billboards promoting Hungary as a tourist destination were placed in high-traffic locations in the U.K., France, the Netherlands, Ireland, Germany, and Italy. Additionally, the HNTO participated in tourist exhibitions and fairs in EU member states emphasizing Hungary's accession to the EU and Hungary's role as a truly European nation. The HNTO has also reached out to non-European source markets. One campaign placed commercials on popular United States television channels, reaching an estimated 3.5 million U.S. citizens in the age range of 50+ years, a group known to be important spenders on leisure tourism. ("Tourism in Hungary 2004," p. 54) An increase in guest nights generated by key source markets such as Japan, Israel, the U.S., and many EU member states from 2003-2004 was subsequently reported by the Hungarian Central Statistical Office, indicating the success of the HNTO's efforts. ("Tourism in Hungary 2004," p. 9)

Similar efforts have been made to reach out to the source markets of the different types of tourism. Hungary's key market for health and wellness tourism is more affluent countries within close proximity, such as Germany and Austria. To reach this source market, the commercial "Hungary Keeps the World Healthy" has been shown on international television channels, and quarterly printed advertisements and PR articles promoting wellness tourism have been placed in *CNN Traveller Magazine*. ("Tourism in Hungary 2004," p. 54) While the health and wellness commercial was claimed a success, it failed to reach non-European source markets. Additionally, Hungary is competing with Mediterranean spas for the health-and-

wellness-oriented tourist. Therefore, the HNTO must make a bigger "splash" if Hungary wishes to become a bath and spa mecca.

With the goal of making Hungary a prime conference destination, the HNTO is trying to reach out to the MICE source market. HNTO offices abroad are instrumental in lobbying for businesses and societies to hold their international meetings in Budapest. In 2004 Budapest played host to over ten conferences, as a result of various HNTO offices. ("Tourism in Hungary 2004," pp. 58-60) In addition, the HNTO tries to reach the MICE source market through other means. Online information, brochures, and CD-ROMs are easily attainable, free of charge. These publications paint Budapest as a city with both an old-world culture and modern amenities, perfect for hosting conferences.

Despite these marketing attempts, Hungary has yet to become a leader in conference-and-meeting tourism. This may be attributed to Budapest's negative image as a city with a poor transport system, poor telecommunications, and a low quality of life. (Eddy) The HNTO has made some attempts to change this negative image. One campaign utilized celebrities with Hungarian roots to promote the country as a cultural destination and to improve its general image. Hungary also hopes that its image may be improved by participation of the HNTO and Hungarian celebrities in prestigious and respected trade events organized in other countries. ("Marketing Plan 2004," p. 4) Additionally, Hungary anticipates that its campaigns emphasizing accession to the EU will reinforce its European character, boosting tourists' confidence in Hungary as a destination.

Room for Improvement

Better Marketing

With its intent to reach higher spending source markets, Hungary's 2004 Tourism Marketing Plan shows many steps in the right direction. However, the marketing plan still leaves much to be desired. While Hungary has marketed itself in many key Western European countries, it has not effectively reached out to other big spenders such as Japan, Canada, and

the Russian Federation. Better access to these untapped prime source markets could produce an increase in tourism revenue. Furthermore, the HNTO should focus on attracting the most profitable types of tourists. While Hungary has tried to promote its health and wellness sector, the campaigns have not reached the North American market, a rich source of these tourists. Hungary must also focus on better reaching the business tourism source market, as this sector provides a higher return on investment. Thus, Japan and the U.S., two nations known for business related travel, need more attention from the HNTO to attract business tourists to Budapest.

A good way for Hungary to better present itself to all source markets is through the internet. Since self-booking tourists are increasingly common, Hungary must seek to better utilize the internet to convey its appeal. While the HNTO maintains a comprehensive website, its technology and capacity need updating. (Végyvári) Although this website is linked to major search engines and to the HNTO's promotional partners, other means of finding the site are limited; and the HNTO's restricted e-marketing budget does not allow for extensive online campaigning. Improvements in this area of marketing would be beneficial to all sectors of tourism, enabling Hungary to reach source markets around the globe and appeal to the information-age generation.

Another major focus of the marketing plan must be image improvement. While the current plan strives to promote Hungary as a modern and competitive European country with a unique character, many still view Hungary in a negative light. According to the 2004 Tourism Marketing Plan, the world's varied perception of Hungary makes effective marketing difficult. Central and Eastern European countries generally have a positive image of Hungary and are well informed about the country, reflected by the high number of tourists received from these regions. Western European countries, on the other hand, tend to be less knowledgeable about Hungary, associating Hungary with its communist past, poor infrastructure, poverty, and low living standards. Western tourists also tend to link Hungary with the rest of Eastern Europe and regard Hungary as having "insufficient

quality and quantity of services, events, [and] accommodation establishments." ("Marketing Plan 2004," p. 4) Correcting this image problem is essential, since a destination must present a positive and consistent image to attract tourists. ("Making Tourism More Sustainable..." p. 26) Tourists need to feel confident in their safety, the healthcare system, the transport system, the telecommunications system, and environment quality. Although the current campaigns seek to improve Hungary's image by associating it with other EU member states, these campaigns have not been very successful. However, marketing alone is not enough to improve Hungary's image. Hungary must take steps to actually improve the quality of its tourism product.

Enhancing Accessibility

Even with successful marketing of Hungary as a tourist destination, potential visitors must have access to Hungary. Without safe and economical means of getting to Hungary, tourism is unlikely to flourish. In 2004 88.8 percent of Hungary's international tourists entered the country by road, reflecting the fact that many of Hungary's tourists come from bordering countries. Only 6.2 percent entered by air and 4.2 percent by rail. ("Tourism in Hungary 2004," p. 9) Since most tourists enter by road, Hungary needs a good highway system. However, the ratio of Hungary's country area to paved road length is significantly larger than that of rival Czech Republic, indicating that the highway system may need improvement. (*The World Factbook*) Additionally, the EU has acknowledged the need for a main traffic route that would run from the Baltic region to the Adriatic. The lack of this connection is thought to greatly hinder north-south traffic. The remedy proposed by the EU would run through Hungary, making it more attractive for business and encouraging travel to and through Hungary.

In addition to highway improvement, Hungary needs greater air travel capacity. Hungary's currently limited access by air may play a major role in discouraging high-spending tourists from the U.S., U.K., Ireland, Canada, and Japan from coming to Hungary.

Currently, Hungary offers very limited options in terms of air travel. Few airlines fly to and from Hungary. Prior to late 2003, no budget airline flew out of Hungary. (Major) A lack of discounted flights puts Hungary at a serious disadvantage for attracting budget-conscious tourists. Similarly, tourists who do fly to Hungary by more expensive means are likely to spend less once in Hungary in order to stay within their budget. Fortunately, budget airlines such as Skyeurope and Germanwings have recently started service to Hungary. Additionally, terminals in Budapest have been modernized in order to serve these new airlines, increasing the city's air traffic capacity. ("May in Review") Since a continued growth in Hungary's air service is likely to increase Hungary's appeal as a tourist destination to more remote and higher-spending source markets, the Hungarian government must encourage this growth in air travel through means of incentives and funding.

Increasing Visitor Spending

In order for Hungary to maximize the benefits from tourism, it must not only draw tourists but entice them to spend more money. Currently Hungary tourism revenue is not proportional to the number of visiting tourists. One way for Hungary to receive higher revenue is to ensure visitor fulfillment. Satisfied tourists are more likely to stay longer, return more often, and pro-

mote by word of mouth. A lack of data on visitor satisfaction to Hungary may indicate that more attention should be given to monitoring this. Tourism-generated revenue can also be increased by luring higher-spending tourists and increasing their duration of stay. Hungary should strive to satisfy those tourists who tend to spend more, such as health-and-wellness and MICE tourists who are prime candidates for return visits. Tourists can also be enticed to stay longer through the promotion of activities and attractions throughout Hungary. To this end, the HNTO's website and tourist information offices situated throughout the country help to inform tourists of desirable destinations and activities. Better relations with trade professionals can also work towards this end.

Conclusions

From my visit to beautiful Budapest and the scenic Hungarian countryside, the rich experiences Hungary has to offer tourists around the world are clear to me. Tourists, however, also have a lot to offer Hungary. As I have stressed in this article, improving the tourism product, marketing, accessibility, and visitor spending could make the tourism industry flourish, allowing Hungary to reap more benefits from tourists. Though the improvements to the industry may be expensive, the potential gains make tourism an industry in which it is well worth investing.

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