

Hungarian spa destinations in the tourism-oriented property market

Gábor MICHALKÓ¹ and Tamara RÁTZ²

Abstract

Hungary is ranked among the most important spa and health tourism destinations in the world. The number and variety of mineral and medicinal waters result in a unique supply in Eastern Central Europe. In Hungary, 51 settlements have certified medical spas, with Budapest, the capital city offering 7 medical spas alone. In addition to their favourable impact on tourism development, the wide range of baths and spa hotels of international standards also affect the real estate market in a positive way. Tourists, who wish to regularly benefit from the medicinal qualities of the waters and the associated medical treatments, may decrease their costs of stay either by buying their own property or by investing in a time-share accommodation facility. Of course, real estate transactions in spa destinations are not always explained by health tourism related motivations; buyers may plan to rent out their property and may be attracted by the expected return on their investment, or may simply wish to repeatedly enjoy the tourist milieu of a given destination. In this article, the spatial characteristics of Hungarian spa destinations' domestic and international tourism demand will be analysed. In addition, the tourism-oriented characteristics of the spa towns' housing markets (with special emphasis on second homes and other properties with leisure-related functions) are to be assessed and foreign citizens' activities on the property market of these settlements evaluated. The research is based on the census and the tourism statistics of the Hungarian Central Statistical Office as well as the registry of foreigners' real estate transactions drawn up by the Ministry of Local Government.

Keywords: health tourism, real estate market, spa destination

Introduction

Spa destinations play a unique role in the Hungarian history of tourism. Both the currently operating spas and the remains of historic spa facilities are witnesses to the flourishing spa culture of the Roman province of Pannonia, that

¹ Geographical Research Institute of the Hungarian Academy of Sciences, Budaörsi út 45., 1112 Budapest, Hungary. E-mail: michalko@iif.hu

² Kodolányi János College of Applied Sciences, Irányi Dániel utca 4., 8000 Székesfehérvár, Hungary. E-mail: tratz@uranos.kodolanyi.hu

of medieval Hungary during the Ottoman occupation, and that of the Austro-Hungarian Monarchy (FARKAS, K. 1962). As recognition of this heritage, the first International Balneology Congress was held in Budapest in 1937 (VITÉZ, A. 1980). Health spas also contributed to the development of domestic and international tourism in the years of socialism (1947–1990) (GROVE, D. 1977). Following the change of the political system – particularly due to the Széchenyi Development Master Plan announced in 2000 –, health tourism based on the country's spas was identified as the primary product of Hungarian tourism (MUNDRUCZÓ, Gy. and SZENNYESSI, J. 2005). Today certified medical spas operate in 51 settlement, with Budapest, the capital city offering 7 medical spas alone³.

Hungarian health spas can attribute their uniqueness to the high temperature of thermal waters and their varied mineral composition. Several spa towns offering health spas and spa hotels of international standards have become the most visited destinations in their regions. This trend has significantly contributed to the development of these towns; positive impacts can be experienced even in settlements where the spa itself is located on the periphery, sometimes even outside the administrative borders. In monofunctional spa towns health tourism is undoubtedly the catalyst of development, while in multifunctional settlements health spa facilities are among the synergic factor that contribute to economic development in general and tourism development in particular (SMITH, M. and PUCZKÓ, L. 2009). Although certain Hungarian spa towns attract either mainly domestic or mainly international customers, in the majority of spa destinations there is a rather balanced representation of both market segments. The construction of new spas, and the development and modernisation of the older ones stimulate not only tourism development, but also the property market.

Those tourists who wish to regularly benefit from the medicinal qualities of the waters and the associated medical treatments, may decrease their costs of stay either by buying their own property or by investing in a time-share accommodation facility. Of course, real estate transactions in spa destinations are not always explained by health-tourism-related motivations; buyers may plan to rent out their property and may be attracted by the expected return on their investment, or may simply wish to repeatedly enjoy the tourist milieu of a given destination. In the domestic market it was recognised rather early, already in the socialist era, that spa towns are 'good places' where it is worth to buy or build a summer cottage or a second home, which led to relatively stable demand for the spas all year round (MARTON-ERDŐS, K. 1985). Second homes could, of course, be used to accommodate relatives and friends, i.e. as a means of nurturing social relations, but could also be used as rental property

³ http://www.antsz.hu/portal/down/kulso/ogyfi/gyogyfurdok_20090829.pdf

in tourism. Foreign citizens appeared in larger numbers in the Hungarian real estate market only after the political changes in 1989–1990, and they also preferred to buy property in spa destinations. Both foreign and domestic customers' decisions to purchase property may have been motivated by investment goals as well, since the plots, houses and apartments are generally easily sold or rented out in spa towns.

The main aims of the paper are to understand the impact of the Hungarian spa towns' facilities and amenities on the willingness of Hungarian and foreign citizens to buy real estate, and to present the spatial characteristics of the process. Consequently, an overview of the spatial characteristics of domestic and international tourist demand in Hungarian spa towns will be provided. In relation with this, the touristic features of real estate markets of the spa towns are to be evaluated (with special emphasis on second homes and other properties with leisure function), and the eagerness of foreign citizens to buy property in these settlements assessed. The research is based on the 2001 census and the 1990–2006 tourism statistics of the Hungarian Central Statistical Office as well as the registry of foreigners' real estate transactions between 2001 and 2006, drawn up by the Ministry of Local Government⁴.

Tourism geographic features of Hungarian spa destinations

Among the various tourism geographic features of Hungarian spa towns, the most influential factors that should be highlighted are their administrative status, functional role, and tourism milieu based on their location. Considering that these factors have a synergic effect on the development of second homes (leisure-related properties), it is necessary to briefly summarise their main characteristics.

Concerning their administrative position, the majority of the 49 spa settlements selected for the purposes of the research have town status, only 4 are classified as village (Cserkeszölő, Csokonyavisonta, Igal, Paráds). In several cases, a settlement received town status due to the additional demand generated by spa and health tourism. Following the political changes of 1989–1990 the designation of urban status to Hévíz (1992), Zalakaros (1997), Harkány (1999), Visegrád (2000) and Bük (2007) might most probably be attributed to their significant tourist demand as opposed to their relatively small population of 2–3 thousand. Of course, the importance of town status lies not in the

⁴ The database used in this paper was completed within the framework of the authors' 2007–2010 research project "Health tourism and quality of life in Hungary". Since the data used in the study were purchased in 2007, the latest figures are available for the year 2006. However, since the analysis is based on longitudinal data for the period 1990–2006, the main conclusions of the study are not affected.

title as such, but in the higher amount of state funding allocated for towns, as well as the increasing opportunities for successful participation in EU projects, which may all contribute to the development of the spa and health tourism infrastructure in the given settlement. In addition, town status, if used in an adequate way, may also result in stronger lobbying power and more intensive marketing communication (PIRISI, G. and TRÓCSÁNYI, A. 2009).

The functional evaluation of spa destinations brought to the surface those specific features that impede the formulation and verification of hypotheses concerning real estate purchases. The settlements classified as 'spa towns' by the authors include both the capital of Hungary and several regional and county centres. Budapest is no doubt a spa destination, since 7 health spas operate within its territory, and these spas form the basis of the city's health tourism industry. The regional centres also have their own health spas, but among them it is only Miskolc in the northeast of Hungary that can boast of a traditional spa culture as well as a separate leisure district built around the cave spa of Miskolctapolca. In Debrecen, Szeged and Győr, only recent investments brought about significant development in the health tourism sector, resulting in internationally competitive spa services that contribute to the already rich tourism supply of these regional centres (in the case of Pécs, the local spa does not have a noteworthy impact on the tourism industry of the city). Besides the capital and the five regional centres, five additional county seats have health spas (i.e. 11 centres out of 20). While Eger, Nyíregyháza and Szolnok are characterised by long spa traditions, related to the medieval Ottoman occupation of Hungary in the case of the first two, and to the Austro-Hungarian Monarchy's heritage in the case of Szolnok, in Békéscsaba and Kaposvár the spa may be considered a supplementary service rather than a primary attraction. In the capital as well as in the regional and county seats, tourism is interconnected to the settlements' other functions: the sizeable population, and the economic, cultural, scientific and educational roles create a wide range of tourist services, notably VFR (visiting friends and relatives) and MICE (meeting/incentive/congress/exhibition) tourism, that are also related to health tourism in many ways (PAGE, S. 1995). Pure health tourism function exists only in some spa towns, since in lakeside settlements (e.g. Balatonfüred, Gárdony) health tourism is interconnected with leisure tourism, while in settlements with significant built heritage (e.g. Gyula, Kalocsa, Visegrád, Sopron) there is a synergic relationship between health tourism and cultural tourism.

The tourist milieu of spa destinations (MICHALKÓ, G. and RÁTZ, T. 2006) may be evaluated on the basis of their administrative status and consequent urban functions. The spa culture of villages where tourism industry is the key economic activity (e.g. Igal, Csokonyavisonta) may be characterised by a rural environment, but a similar rural milieu can be experienced in the peripheral leisure districts of larger spa towns (e.g. Mezőkövesd–Zsóry-fürdő;

Orosháza–Gyopárosfürdő). A typical small town milieu can be found either in settlements where the health spa itself contributed to the urban development of the place significantly (e.g. Hévíz, Harkány, Zalakaros), or as the combined consequence of the historical development of the settlement and current urban functions (e.g. Püspökladány, Kiskunfélegyháza). Budapest, the capital city, reflects a unique urban milieu, due to its size and development, but certain features of this milieu may also be experienced in the regional centres and county seats. As a further category, the lakeside holiday towns offer a particular atmosphere, due to the specific characteristics of the summer season's leisurely lifestyle.

The spatial characteristics of tourist demand in spa destinations

Hungarian spa destinations may be categorised according to the number of registered guest nights as well as the origin of the guests. Concerning guest nights, settlements can be differentiated as those with significant, moderate and low demand, while concerning the origin of guests, there are predominantly domestic vs mainly international destinations as well as destinations with a relatively balanced demand.

Based on the number of registered guest nights, 18 spa towns belong to the first group that generates **significant demand** (more than 100,000 guest nights annually), accounting for 38% of the settlements included in this study. Within this group 5 regional centres (Debrecen, Győr, Miskolc, Szeged, Pécs) and 3 county seats (Eger, Nyíregyháza, Szolnok) can be found (*Figure 1a,b*). In these cities it is rather difficult to differentiate between health tourism demand and other forms of urban tourism demand. In the case of Bük, Hajdúszoboszló, Harkány, Hévíz, Sárvár and Zalakaros, a relatively small population is combined with a dominant health tourism function. In towns located along the borders of the country, such as Komárom at the Hungarian–Slovakian border, Gyula at the Hungarian–Romanian border, and Sopron at the Hungarian–Austrian border, shopping tourism and cultural tourism play an equally important role. In Balatonfüred and Gárdony spa and health tourism exists in symbiosis with lakeside holiday tourism.

The number of spa settlements with **moderate demand** (the number of guest nights being between an annual 10,000 and 100,000) is 20, accounting for 42% of the settlements included in the study. These towns lack the regional functions, but several have county seat status with subsequent urban roles (e.g. Békéscsaba, Kaposvár). However, as opposed to the traditional spa culture of the large county centres (leading back to the Ottoman heritage in Eger, or to the Austro-Hungarian Monarchy's traditions in Nyíregyháza), the medium-sized county centres do not possess such a historic spa culture that could serve

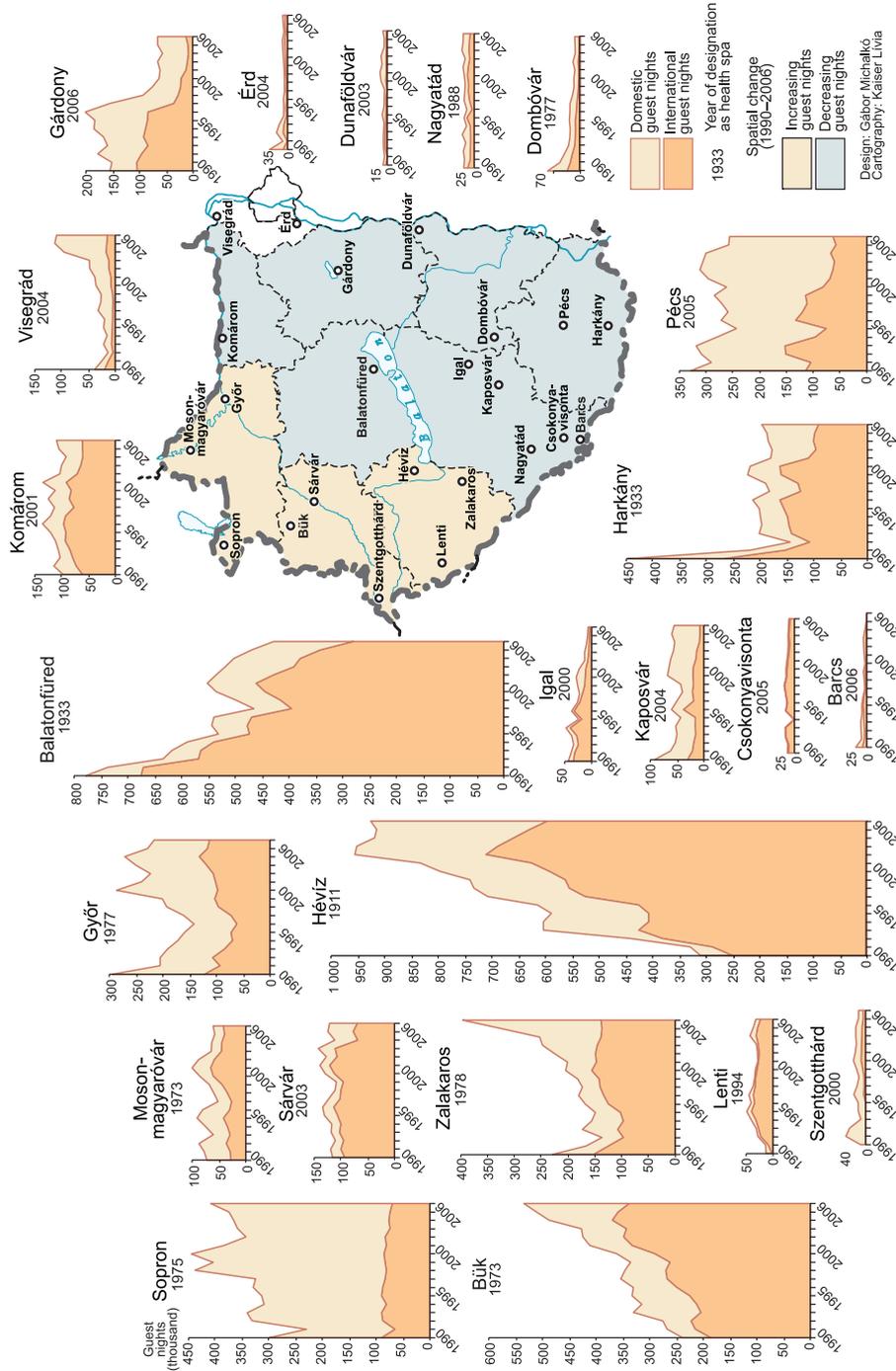


Fig. 1a. Guest nights at spa destinations in Transdanubia, 1990–2006

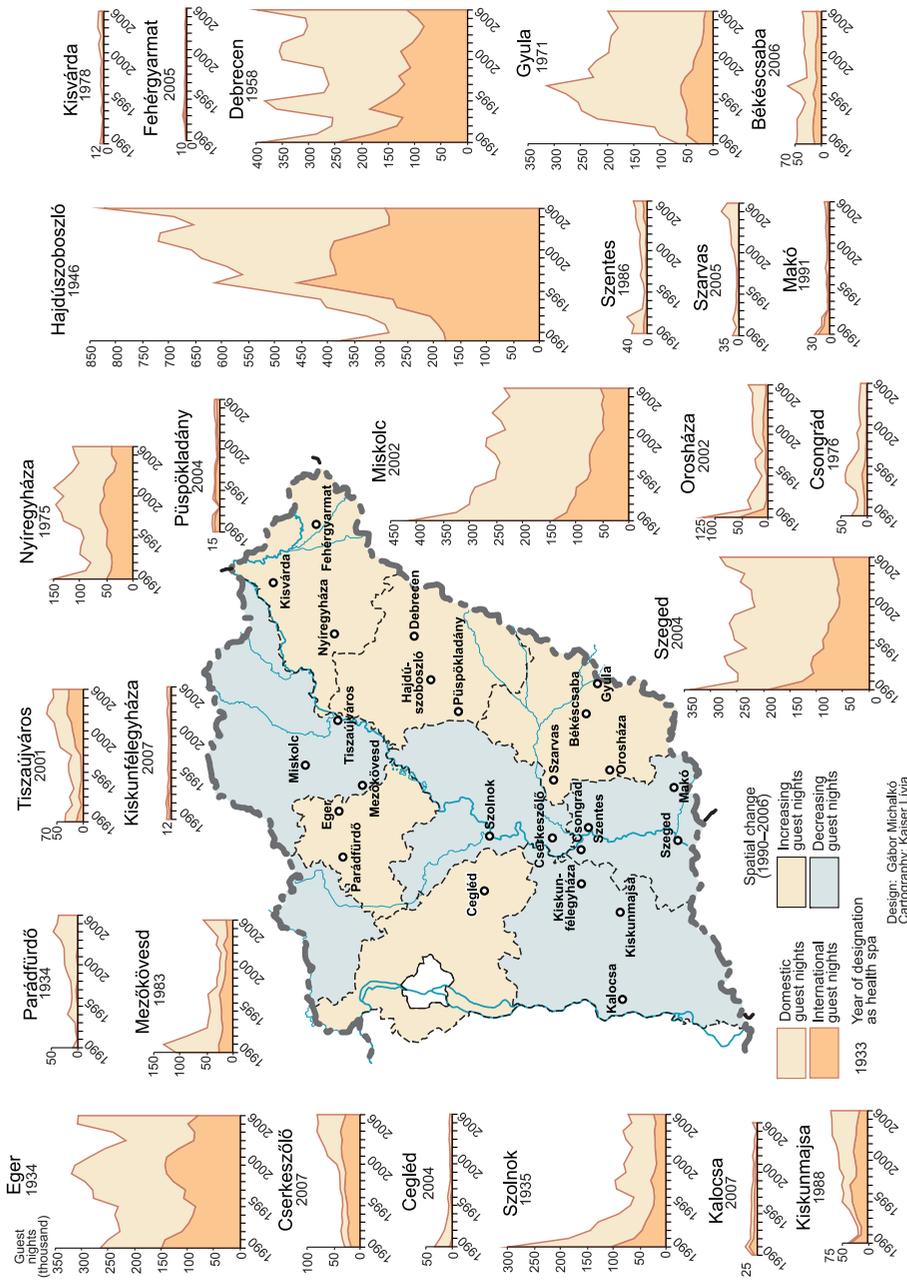


Fig. 1b. Guest nights at spa destinations in Eastern Hungary, 1990–2006

Design: Gábor Michalkó
Cartography: Kaiser Livia

as primary attraction in the health tourism market. In the group of spa towns with moderate demand, Cserkeszölő, Csokonyavisonta, Igal, Kiskunmajsa and Parádfürdő may be classified as monofunctional spa towns, while the economic structure and the tourist demand of other settlements are affected by further activities, such as culture in Visegrád, retail in Lenti, and industrial and/or agricultural activities in Tiszaújváros, Szentes, Szarvas, Szentgotthárd, Orosháza, Mezőkövesd, Mosonmagyaróvár, Kisvárd, Dombóvár, Csongrád and Nagyatád.

Among the spa destinations with **low demand** (with guest nights between 1,000 and 10,000), neither regional nor county centres are found. Most of these settlements are located either on the borders of Hungary (Barcs, Fehérgyarmat, Makó), or in the hinterland of major tourist destinations (Cegléd, Dunaföldvár, Érd, Kalocsa, Kiskunfélegyháza, Püspökladány).

Between 1990 and 2006, domestic guests accounted for an annual average 59% in spa destinations, and international guests accounted for 41% (excluding Budapest). Dominant domestic demand (higher than 67%) characterised 20 spa towns (42% of the settlements included in the study), while dominant international demand was registered in 6 settlements (13%). The majority of spa towns attracting predominantly domestic guests are located in the eastern part of Hungary, whereas all the spa towns that are characterised by a mainly international clientele are situated in the western part of the country. No relationship could be found between the origin of demand and the geographical location of a destination: the composition of demand is not affected either by the destination's distance from the borders or its closeness to the capital city, Budapest (i.e. the gate of international tourism in Hungary, and the major sending area in domestic tourism). The share of domestic guests is the highest (92%) in Parád, in the Mátra Mountains: medical tourists using the services of the state-owned spa hospital as prescribed by their doctor, accompanied by family members, account for the majority of the guests. The ratio of international visitors is the highest (83%) in Csokonyavisonta, near the Hungarian–Croatian border; however, this situation is rather the consequence of the demand of mainly German and Dutch guests staying at the traditional holiday centre of the township, than that of a cross-border Croatian demand.

Spa destinations as second homes of Hungarians

One aspect of the ample literature sources discussing second homes (HALL, M. and MÜLLER, D. 2004) is the specific characteristics of the East European development in this field (CSORDÁS, L. 1999). In the former socialist countries, before the change of the political system in 1989–1990, second homes formed

one of the principal bases of private property ownership. In the centrally planned economies, purchasing real estate provided an opportunity to invest one's generally moderate savings in a profitable way on the one hand, and the possession of a second home raised the individual's social status, on the other hand. Consequently, leisure zones consisting of second homes were developed in the vicinity of larger cities, spa towns and waterside destinations. Additional factors in second home development were the era's political-economic characteristics: since international travel within the Soviet bloc was limited for political reasons, and the capacity of domestic tourism services (mainly holiday centres run by trade unions and companies) was insufficient to meet the growing domestic demand, buying or building second homes provided the only option to satisfy the population's leisure needs. Since adequate building materials were also scarce, the first leisure units in the late 1960's were more like small sheds on empty plots; ready-made wooden houses became popular in the 1970's, and stone buildings appeared in larger numbers mainly in the 1980's. The market of second homes experienced a boom in the 1990's: the new owners generally renovated the older buildings or demolished the sheds and wooden houses and had modern stone buildings constructed. The modernisation process was often accompanied by a change in the property's function: in several cases, the old/new owners changed residence and moved permanently to the former second home (e.g. the original owners spending their retired years in the former holiday home or their grown-up children settling down in the parents' holiday home).

The spa destinations play a special role in the Hungarian second home market. Compared to the use of leisure zones built around the larger cities and in waterside destinations, the use of holiday homes in spa destinations is less seasonal, which has resulted in a more favourable impact on the development of the given settlements. Most thermal health spas are fully or partly indoor facilities, i.e. they are available for guests throughout the year. The owners of second homes in the spa destinations can use the services of the spa any time of the year, but they can also rent out their property temporarily or offer it to friends and relatives. The less seasonal distribution of demand requires higher infrastructural development which has a positive impact on the destination's population, by attracting immigration and providing favourable opportunities to residents. In many cases, the holiday zones built around the spa town centres became semi-independent districts that contributed significantly to the overall economic and social development of the settlement.

The basis of research on second homes in Hungary is the 2001 census that included specific data collection on holiday homes. According to this database, 6% of all real estate units were used as second homes in 2001, and in 78 settlements, the share of second homes exceeded 50% of the total number of real estate units (*Figure 2*). These towns and villages may be classified as

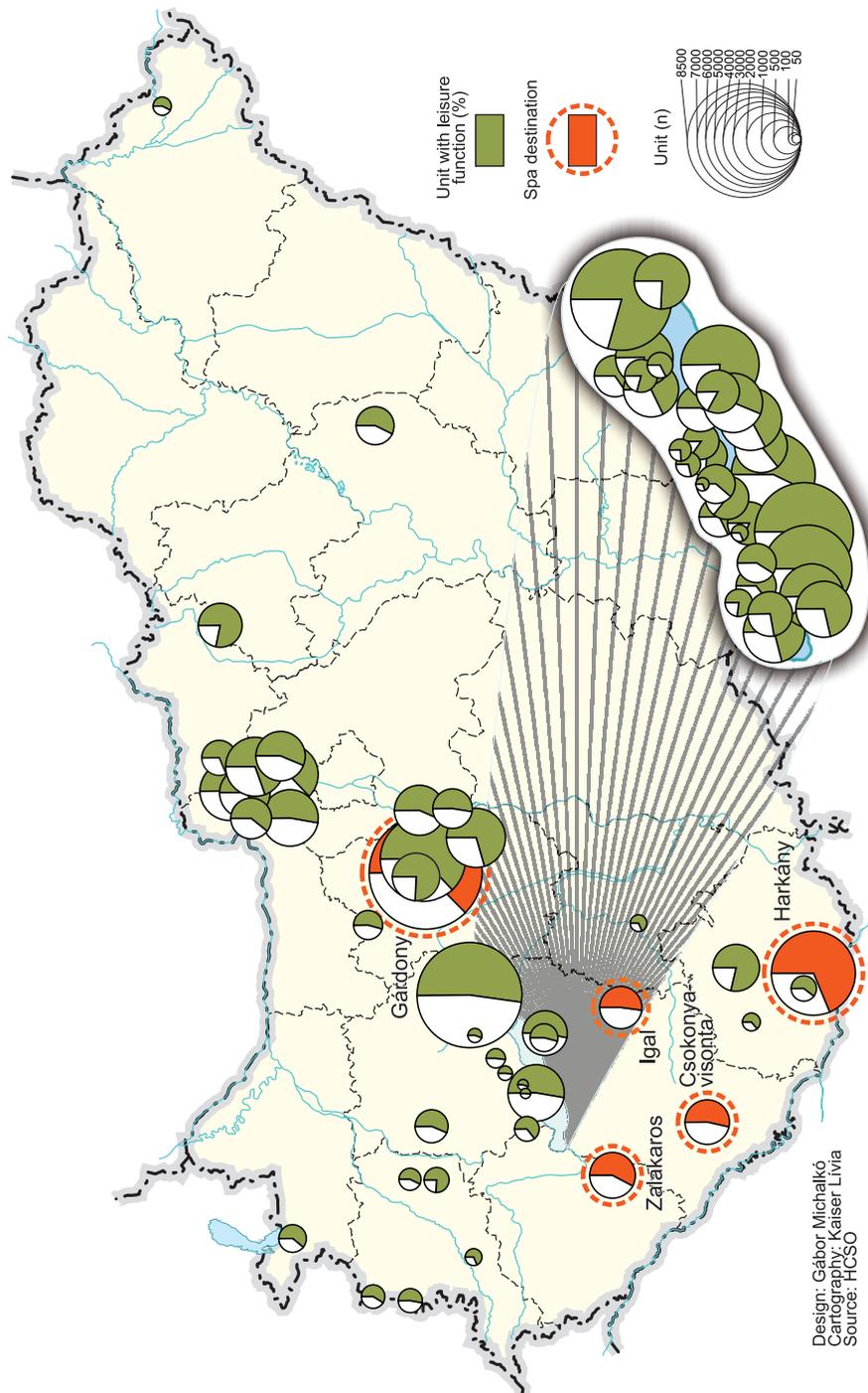


Fig. 2. Spatial distribution of real estates with dominant leisure function in Hungary, 2001

holiday settlements, the majority of which are concentrated in the picturesque Danube Bend, north of Budapest, as well as in the most popular water-based holiday destinations, in the Lake Velence and Lake Balaton regions.

Out of the 78 classified holiday settlements of Hungary, only five are spa destinations. Second homes account for more than 50% of all real estate units in Csokonyavisonta (53.3%), Gárdony (62.6%), Harkány (68.7%), Igal (51.9) and Zalakaros (57.8). All of the five spa towns are located in the western part of the country, and their population did not reach 10,000 persons in 2001, with the largest number of residents living in Gárdony (8,073 persons) and the smallest in Igal (1,351 persons). It shall be noted however, that despite the low population level, Three out of the five spa destinations have official town status (Gárdony, Harkány and Zalakaros), and while Gárdony's urban functions may be explained by its population size and the surrounding gravity zone, the town status of Harkány and Zalakaros, awarded after the political changes of 1989–1990, can be attributed, without doubt, to the settlements' dominant health tourism function.

Although the share of second homes within the overall property market cannot be considered dominant in Balatonfüred (35.2%), Visegrád (32.5%), Cserkeszölő (25.6%), Hévíz (23.2%), Parád (19.4%), Hajdúszoboszló (17.2%) and Bük (15.6%), their ratio is still noteworthy. In further 23 spa towns the share of second homes is between 1 and 10%, i.e. rather low, while in the remaining 14 settlements the figure is negligible, i.e. less than 1%.

Real estate purchases by foreigners in Hungarian spa destinations

Buying real estate abroad is one of the main subjects in the field of tourism-migration research (WILLIAMS, A. and HALL, M. 2000). Studies within this area focus mainly on travel associated with property purchase, the age aspects of the phenomenon, with special attention to the involvement of the elderly, as well as to the main directions of international migration and tourism flows. Due to the lack of suitable databases, relatively few studies discuss the interrelationship of buyers' citizenship and their spatial preferences. In fact, such analyses were first carried out in Hungary, by ILLÉS, S. and MICHALKÓ, G. who examined the spatial and temporal aspects of foreigners' decisions on real estate purchase (ILLÉS, S. and MICHALKÓ, G. 2008; MICHALKÓ, G. and ILLÉS, S. 2008).

A data collection system based on uniform standards concerning real estate purchases by foreign citizens was adopted in Hungary in 2001. The available database allows the analysis of the number and citizenship of foreigners who bought real estate to be performed on settlement level. Between 2001 and 2006, 36,434 foreign citizens purchased real estate in Hungary. During

this period, German nationals represented the largest group of buyers (33.1%), followed by Austrians (14.7%), Romanians (9.6%), Dutch (8.6%), Irish (6.3%) and British (4.1%), altogether accounting for 76.4% of the international customers. Concerning the spatial distribution of the purchased property, fairly characteristic territorial preferences could be identified by citizenship.

Germans preferred settlements in the Lake Balaton region (the largest lake in Central Europe, the main summer holiday destination of Hungary), while most *Austrians* bought property in towns and villages in the vicinity of the northern section of the common borderland. *Romanians* also favoured the area along the middle section of the respective borderland zone (in addition to Budapest). *Dutch* citizens mainly purchased homes and farmsteads in two specific areas of the countryside located south of the south-west–north-east axis of Hungary. *Irish* buyers displayed a clear preference for Budapest: the share of the Hungarian capital was so high (94.9%) that there are hardly any properties in Irish possession in the countryside. Similarly, *British* customers also bought real estates mainly in the various districts of Budapest.

To a certain extent, in the Hungarian property market every spa destination is subject to foreign customers' interest. Between 2001 and 2006, 20.6% of all real estate transactions by foreigners were completed in Budapest, whereas spa towns in the countryside registered 9.8% of the demand. However, the distribution of buyers by citizenship shows a unique picture in Budapest as compared to the countrywide composition of foreign real estate purchasers: Budapest is mainly attractive for the Irish (28.9%), the British (10.9%), the German (9.2%), the Romanian (6.4%), the American (5.1%) and the Italian customers. In contrast, the other spa towns located in the countryside are mainly popular among the German (29.6%), the Austrian (16.8%), the Romanian (11.9%), the Serbian (5.1%), the American (5.0%) and the Dutch buyers (4.1%).

A more detailed analysis of the countryside spa destinations shows that 17 different nationalities accounted for at least 10% of the demand for property, which indicates a very varied demand (*Figure 3*). Within single settlements, only Germans, Austrians, Romanians or Ukrainians were able to reach a dominant position, i.e. constituted more than 50% of all demand. German buyers proved to be dominant in the real estate market of 8 spa towns: in Cserkeszölő (58%) in the eastern part of the country, and in Dombóvár (65%), Gárdony (58%), Harkány (53%), Hévíz (52%), Igal (86%), Komárom (54%) and Zalakaros (83%) in western Hungary. Austrians dominate the property market near the Hungarian–Austrian border in Mosonmagyaróvár (65%) and Sopron (68%), Ukrainian buyers play a key role in Kisvárdá (55%) located close to the Hungarian–Ukrainian border, while Romanian customers made the majority of real estate transactions along the central axis of Hungary, and in Makó (61%), Püspökladány (92%) and Tiszaújváros (63%). An analysis of the settlements' main functions and the composition of the international demand

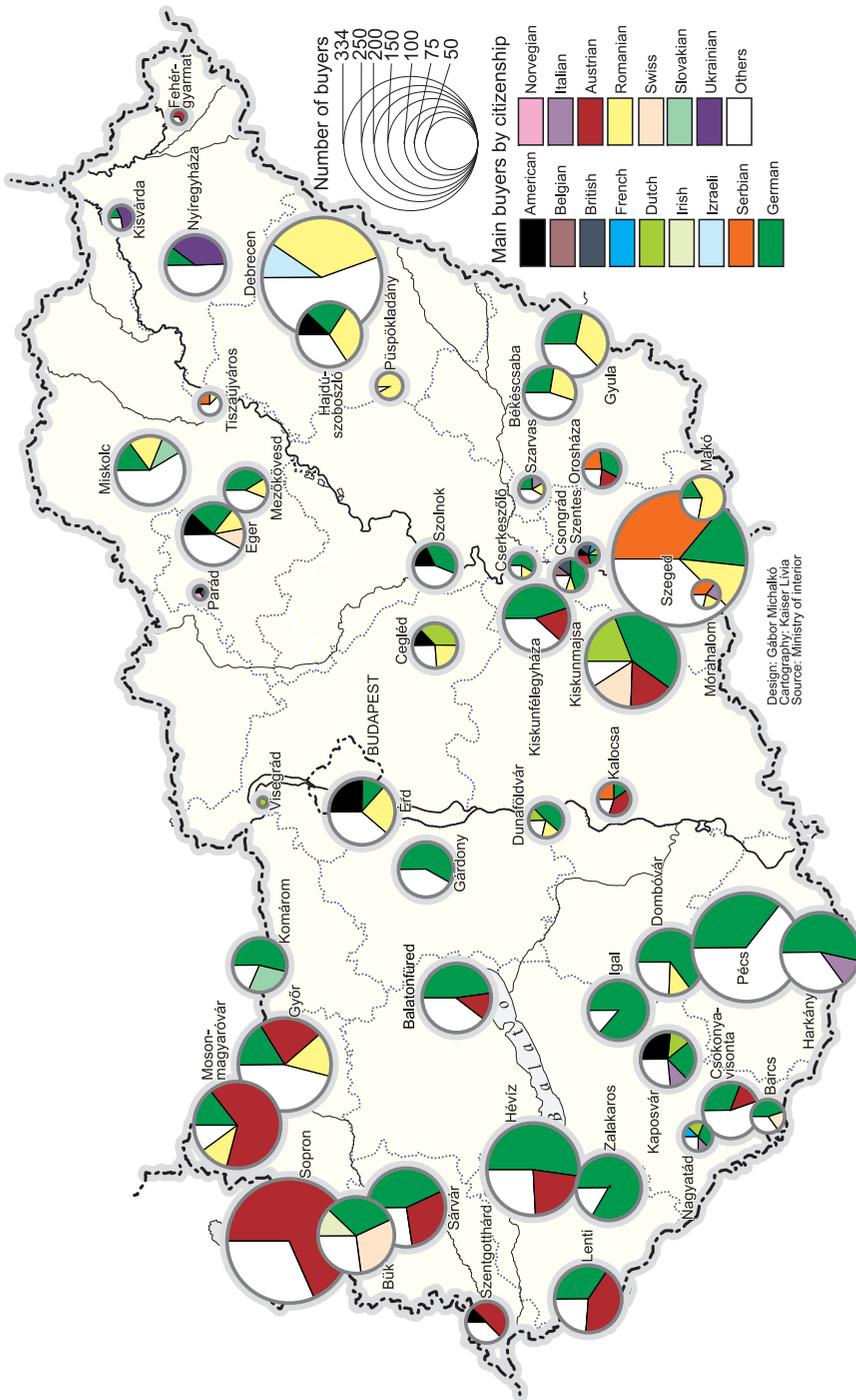


Fig. 3. Foreign real estate buyers in the spa destinations in Hungary, 2001–2006

in the real estate market suggest an influence of the geographical distance of the property buying decision, however, a health tourism oriented motivation only seems to affect the German and the Austrian customers. The dominant presence of Romanian and Ukrainian buyers is more likely to be explained by existential motives, such as the employment opportunities provided by certain settlements or areas.

In addition to the dominance of certain nationals within settlements, it is also important to analyse the most popular target markets within each nationality group, in order to make an effort to understand the relationship between health tourism oriented motivation and real estate purchase. However, there are very few settlements that are clearly favoured by a certain nationality – e.g. Szeged is the favourite market of the Serbian customers (66.5% of all transactions), Bük is most popular among the Irish (41.9%), Debrecen is the favourite of the Israeli (65%) and the Norwegian (43.6%) buyers –, and only the Dutch, the Swiss, the Irish and the German property purchasing decisions are likely to be explained by the attractiveness of a given destination's spa, in all other cases the spa is most probably only a supplementary factor in the decision-making process.

Conclusions

Hungarian spa towns play an exceptionally important role in the country's domestic and international tourism, due to their historic heritage as well as their present development and predicted potential. The country's spa heritage goes back to the Roman age and Ottoman occupation, when the basis of today's spa culture was laid; the investments realised within the framework of the Széchenyi Development Master Plan contributed to the development of the spa and health tourism infrastructure, while the National Tourism Strategy ensures the country's future competitiveness in this field.

Health spas are the main actors on the Hungarian health tourism market, and spa destinations are the major beneficiaries of health tourism demand. Despite the relatively even spatial distribution of spa towns, significant differences can be experienced in terms of economic and tourism development, and there is a strong competition in the tourism market among these settlements. Since the temperature and the mineral composition of mineral springs is suitable for health tourism development in each town, the level of demand is mainly influenced by the quality of the services, the tourist superstructure developed around the health spa (accommodation and restaurants), and the accessibility of the destination.

Hungarian citizens are likely to purchase property in spa towns: several leisure districts located on the periphery of these settlements were built as

a consequence of Hungarians' demand for a second home. However, despite these favourable processes, spa towns cannot be considered the primary targets for domestic owners of second homes: out of the 48 spa towns included in the study, second homes accounted for more than 50% of all real estate units only in five settlements. Nevertheless, purchasing property in a spa town is generally a good investment, due to the continuous development of spa and health tourism, since the owners can easily sell their property or rent it out throughout the year. As a consequence, real estate prices are relatively high in the popular spa destinations, which may limit the number of domestic customers compared to international buyers with generally higher purchasing power.

Foreign citizens appeared in larger numbers on the Hungarian real estate market only after the systemic change in 1989–1990. Since spa destinations have always played a key role in Hungary's international tourism, many foreign citizens showed willingness to invest their savings in real estate in already familiar settlements where they earlier had had pleasant experiences. International demand for property in Hungarian spa destinations is quite varied: there is a significant difference in the buyers' nationality concerning the preference of the capital or the other spa towns, the common customer groups being the Germans, the Romanians and the Americans. Although the available statistical data are not suitable for analysing the relationship between health tourism-related motivation and real estate purchase decision, the monofunctional nature of certain target settlements suggests such a correlation.

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