

AN ANALYSIS OF THE SERVICE PROFILES OF FOUR-STAR WELLNESS HOTELS IN HUNGARY

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Abstract: The health tourism market has been growing steadily, driven by increasing global awareness of health and well-being. To meet the diverse and ever-changing market demand, health tourism businesses strive to differentiate their products. In Hungary, hotels offering wellness services typically position themselves as either “wellness” or “medical” hotels and communicate their profiles through various marketing tools. The present research, focusing on four-star hotels in Hungary, aims to explore their positioning, identify wellness sub-profiles based on specific services, and develop a classification system for wellness hotels. By analysing the services provided by 238 four-star hotels in Hungary, it was found that 91 hotels primarily target wellness guests. Descriptive statistical methods were employed to assess the wellness services and categorise the selected hotels based on deviations from the mean, standard deviations, and concentration measures. Following the analysis of the wellness offerings, two major service groups were identified: the “wellness service group”, which primarily requires substantial infrastructure, and the “selfness service group”, which is more reliant on human resources. The wellness and selfness potential of a hotel, derived from the evaluation of its services, also serves as an indicator of market impact. Based on the characteristics of the services, the hotels were classified as relaxing wellness, health-conscious wellness, holistic wellness, medical wellness, and hotels with no distinctive profile. The proposed categorisation has practical implications for both hotel and destination management, as resource optimisation and economic efficiency require clearly defined hotel profiles. The inclusion of certain services in a hotel’s offering is a strategic decision with direct implications for the allocation of material and human resources. At the same time, at the macroeconomic level, it would also be important for national tourism management to reintroduce the recently abolished regulation prescribing services related to the terms “wellness” and “medicinal”. This would allow for a uniform interpretation from both the service provider and the consumer side, which would also entail profile cleaning. It would also facilitate national economic summarization and the measurement of profile performance in the future. The increasing importance of clinical medical tourism in Hungary could be clearly distinguished.

Keywords: health tourism, wellness hotel, wellness profile, market segmentation, spa, hotel management

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INTRODUCTION

Health tourism has become one of the most dynamic tourism products, reflecting the global trend of health-conscious living. This is also true for both of its two main product groups, wellness and medical tourism, although the pace of development of the former is undoubtedly much faster than that of the latter. The concept of health and wellness tourism is closely linked to well-being, stress reduction, physical and mental balance and leisure activities (Chen & Petrick, 2013).

The desire to be fit and beautiful is a motivation as strong as the desire to heal, but the phenomenon is also polarised for other reasons. Health services and treatments are often identified with a concept of illness as a result of the environment in which they are offered. Many people still would like to use the various treatments because of the health benefits but strive to avoid any association with illness. The contradiction can be solved by using the term “wellness” instead of “medical”, offering wellness treatments instead of medical treatments (Kóródi, 2023).

Among other things, the emotional background of the guests’ conceptualisation has led to a shift in the service mix of the so called „medical hotels”, which were historically the first to offer health tourism services. Medical hotels have to make a strategic decision whether to maintain a pure medical profile specialising in treatments best suited to their natural, human and technical resources or adopt a mixed profile (medical and wellness) adding new, wellness services and targeting new market segments. The mixed profile, in addition to the risk of losing the old clientele, also requires greater flexibility in marketing communication, emphasizing a sub-profile satisfying the actual demand. Given the downward

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trend in medical treatment numbers and the underfunding of state subsidised treatments, a complete change of profile is also possible, with the hotel having to enter a new market by developing new and existing wellness services, partly adapting to the expectations of the environment. Both the wellness hotels originally established and operating with a wellness profile and the newly built wellness hotels are increasingly forced to position themselves efficiently if they intend to distinguish themselves from resort hotels, where wellness services are also increasingly part of the offer (Boros et al., 2011).

Health tourism businesses have to face various economic, social, political and environmental challenges. In general, national governments strive to enhance economic development, while decreasing expenditure on public healthcare and health-related services (Lukose et al., 2024). In Hungary, besides medical and wellness hotels, thermal spas also provide a wide range of medical, wellness and recreational services to their guests, thus increasing competition at the tourism market (Kővári-Tóth et al., 2024). In addition to the constantly changing circumstances, the reorganisation of the international markets has taken place as a result of wars and economic crisis at certain source markets. The purpose of the present study is to address these challenges by exploring the potential elements of the service mix and the communicated profile of four-star wellness hotels. The specific aims are to explore the positioning of wellness hotels on the health tourism market, identify wellness sub-profiles based on specific services, and develop a classification system for wellness hotels.

LITERATURE REVIEW

Although “health”, “medical” and “wellness” tourism are often used interchangeably in the scientific literature, each category has its distinctive features, including different services, demand factors and motivations (Wong et al., 2024). Health tourism is a tourism product where the travellers’ primary motivation is to improve or maintain their health, i.e. to recover or prevent illness (Kóródi, 2024). Health tourism that promotes physical, mental or spiritual health can be divided into two main categories: medical and wellness tourism (Smith & Puczkó, 2014). While medical tourism aims at health restoration, wellness tourism focuses on prevention, recreation and the maintenance of health (Mueller & Kaufmann, 2001; Voigt et al., 2011; Martins et al., 2025). Medical tourism includes clinical and surgical tourism that may also involve medical operations at special treatment facilities (Ruszinkó & Donka, 2019).

Suess et al. (2022) argue that it is a type of niche tourism which originates from the fast increase of domestic and international travelers in search of medical treatments for various health conditions. A related form is the so called traditional health tourism, which focuses on traditional and alternative therapies and combines locally rooted healthcare practices with unique tourism experiences (Yan, 2024). Wellness tourists travel in order to enhance their physical, psychological, spiritual and social well-being (Voigt et al., 2011). At the beginning wellness tourism was only related to the spa sector, however by these days it has become a more generic term including other tourist products and reaching new customer segments (Printz-Markó et al., 2017; Ciobanu & Luches, 2018). Wellness travellers can be grouped into primary wellness travellers who are primarily motivated by pursuing some kind of wellness activity, and secondary wellness travellers who engage in wellness treatments or activities while undertaking any other type of travel (Datta, 2022). The holistic part of wellness tourism also includes yoga, meditation and other services that belong to the New Age trend (Smith & Puczkó, 2010). International research highlights that yoga, Ayurveda, spirituality and meditation contribute to the satisfaction level of wellness tourists to a great extent (Datta, 2022). In general, wellness tourism businesses offer specific products that aim to improve people’s quality of life (Chen et al., 2008).

Wellness tourism may also involve medical services, which have an outstanding role in preventative healthcare (Huang & Xu, 2018). Furthermore, in addition to the infrastructure to support wellness tourism, the culture of spa and wellness alongside with the health destination environment, and the potential for developing innovation and cooperation are the most significant decisive factors in the competitiveness of a wellness destination (Phuthong et al., 2023). Innovation in tourism, which may manifest itself in health tourism product development, is a strategic feature that also frequently contributes to the sustainability of businesses and destinations alike (Pilelienė et al., 2024).

Sustainability has become an integral part of long-term tourism strategies aiming to optimize economic benefits, minimize negative socio-cultural impacts on local communities, and protect the natural environment (Ivancsóné Horváth et al., 2025). As wellness tourism is frequently based on natural resources, especially thermal water, the requirements of sustainability must receive special emphasis in tourism development.

Health tourism has great market potentials in Hungary as a result of the rich natural resources, the newly developed balneological and tourism infrastructure and the cultural traditions of thermal spas (Csobán et al., 2022). Wellness tourism attracts not only senior tourists but also members of the Generation X and Y. In Hungary Generation Y are open to take advantage of wellness services, as well as physical and mental recreation facilities (Ivancsóné Horváth & Printz-Markó, 2018). The Hungarian National Health Tourism Development Strategy (hereinafter NHTD) claims that the aim of wellness tourism is health promotion, whereby healthy people in their free time, at their own expense or with additional funding (e.g., health insurance) acquire a package of services including health elements (mental, physical, biological) in an attractive and entertaining environment. The medical wellness target group, which includes guests suffering from illnesses and/or aiming to prevent illness on a medical-professional basis, was defined.

The approach is based on a preliminary assessment of the guest's condition, the corresponding information on healthy lifestyle and the selection of the most individually recommended services (OEFS, 2007). Medical tourism as a well-defined and important part of health tourism was dominant in Hungary until 2005, as all trips motivated by the use of medical or spa treatments fell into this category. Then, in the tourism development documents (OEFS, 2007; Magyar Turisztikai Ügynökség, 2021), wellness tourism was distinguished from health tourism, broadening the definition of health tourism to include the prevention function.

Medical and wellness tourism have recently become the focus of destination management and marketing (Mason et al., 2023). It is notable that the range of tourism products is expanding and the services within each product are becoming more diverse and specialised (Ruszinkó & Donka, 2019).

Wellness service providers have also started to become differentiated within the sector. The wellness profile covers a specialised range of services offered by establishments where "wellness is accompanied by some function that makes the service provider special and thus its service can be presented to the market as a Unique Selling Product.

Such profiles include Turkish and Roman baths, naturopathy, nutrition centres (digestive treatment), thermal waters, manager cures (circulatory, digestive, cancer screening, stress management), conference and wellness, family holidays, aquaparks, adventure baths, and Far Eastern therapies (OEFS, 2007). Wellness is often described as multidimensional including six dimensions, such as physical (regular exercise, nutrition, sleep), spiritual (meaning and purpose of human existence), mental (intellectual mind), social (connection to one's community), emotional (awareness and acceptance of emotions) and environmental (environmental awareness) (Global Wellness Institute, 2024). However, this multidimensionality is of limited use for profiling and positioning wellness hotels due to their synergistic relationship with each other.

MATERIALS AND METHODS

In-depth interviews with decision-makers in charge of product development in hotels, as well as website observation and analysis in the case of hotels that display their offers on their websites are adequate methods to explore the profile-specific composition of the service mix (Boncz, 2015). In this research, the latter was applied, i.e. the content analysis of the offers displayed on the websites of a systematically selected sample was implemented (Lehota, 2001; Gyulavári et al., 2017). Objectivity was ensured by a pre-tested evaluation sheet. The assessment was conducted in October 2024, selecting from the four-star hotels in Hungary (N=238) those that either have a name that refers to their services or offer wellness services that appear to be above average. Finally 91 hotels were selected for analysis. The four-star category has been chosen because it attracts both domestic and international guests who expect high quality services. The evaluation sheet was developed with 40 criteria, out of which the services of the adventure pools and the sauna services as classic wellness services were given double weight. Five wellness hotels (Aquaworld Resort, Budapest, Hotel Europa Fit Hévíz, Bonvital Hotel Wellness & Gasztro, Hévíz, Sungarden Wellness & Conference Hotel Siófok, Hotel Golden Lake Resort, Wellness and Conference Hotel Balatonfüred) with ***** superior rating were selected for the testing. Based on the results of the pilot test, the number of criteria to be rated was reduced to 37. No further differentiation was necessary. The scope of weighted counting was narrowed down to ten services, resulting in a total of 47 points.

Simple descriptive statistical methods with Microsoft Excel support were used for the analysis. The analysis started by summing up the scores obtained during the evaluation, ranking the hotels, calculating the average wellness tourism potential and grouping them according to the deviation from the average, and then proceeded to interpret the position of the hotels by assigning deciles (Gerzson, 2011; Kóródi, 2011). Similarly, the examination of services by summing the occurrence values allowed for ranking and sub-ratio analysis. By separating the services by wellness characteristics, a complex analysis became possible, by plotting the deviation of the average rating values from the mean in the two criteria, the quarters of the coordinate system were divided into characteristic groups of the hotels studied. The resulting positions may influence strategic decisions on the directions of development (Figure 1).

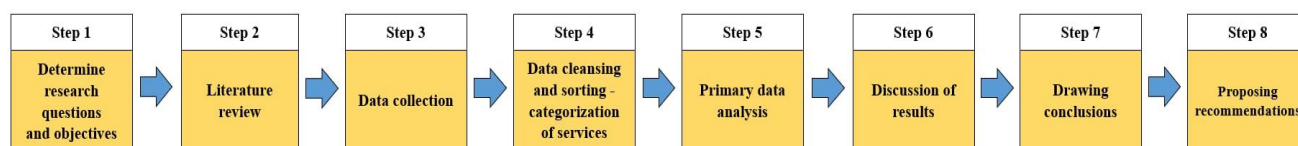


Figure 1. Methodology flowchart (Source: Authors' own compilation, 2025)

RESULTS

Based on the scores obtained for the services, the selected wellness hotels can be classified into five categories according to their service potential relative to the average (Figure 2), with outstanding, above average, average, below average and insignificant. The average potential of the services offered is 15.34, with a high relative variance (0.81).

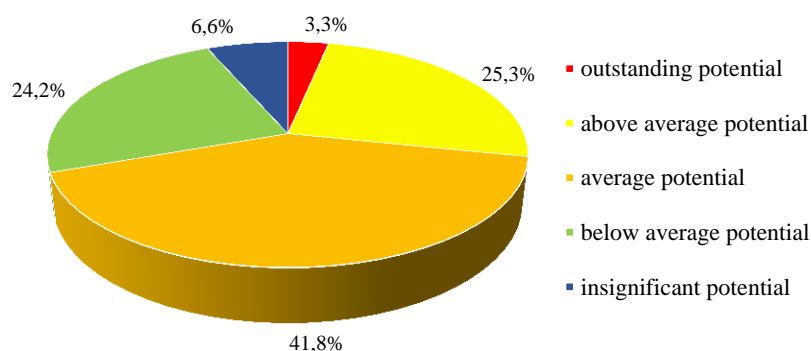


Figure 2. The distribution of Hungarian wellness hotels based on their specific service potential (Source: Own database (n=91))

41.8% of the hotels fall into the average wellness service potential, 25.3% have an above average service potential and 3 hotels have an outstanding service potential (3.3%). 24.2% of the hotels are in the below average category, 6.6% have an insignificant rating based on their relation to the average. In terms of their geographical location, hotels from Western Hungary, Hévíz, Zalakaros, Balatonfüred, Zalakaros and Szentgotthárd dominate the ranking, followed by hotels from the rest of the country. In the lower decile, the actual existence of a wellness character has been noted, but when examining the hotels individually (e.g. Smart Hotel Budapest, Calendula Ayurvedic and Medical Hotel Siófok), differentiation and the offer of special services are typical instead of general wellness services (Figure 3). Services are highly concentrated, with 9 out of 37 services covering more than half (51.9%) of the services offered, with Finnish sauna, classic massage, whirlpools, massage jets, alternative massages, other adventure pools, steam baths, infrared sauna and relaxation room ranking in the top quartile. Frigidarium, life coaching, sound therapy, nutritional counselling, mindfulness, and yoga appear at the bottom of the ranking with low prevalence, although their therapeutic utility is unquestionable. When looking at the concentrated occurrence of services, the cumulative amounts and cumulative frequencies calculated from the ratings show a strong concentration (GINI index: 0.554), i.e. the higher rated hotels have the higher proportion of services (Figure 4).

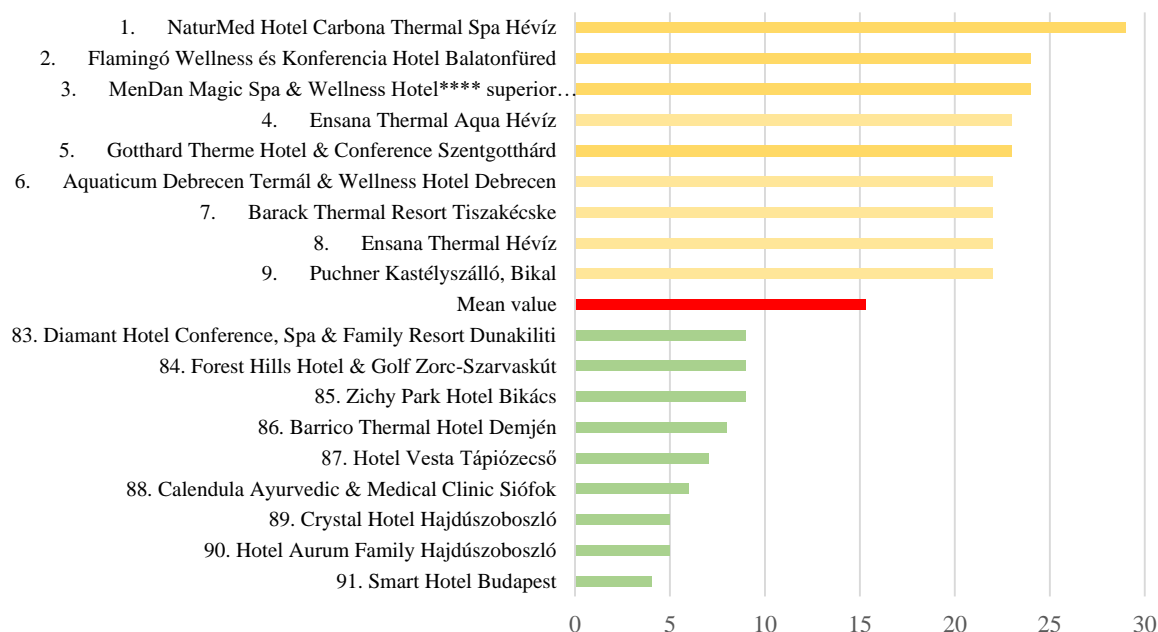


Figure 3. The specific service potential of Hungarian four-star wellness hotels' lower and upper decile (Source: Own database (n=91))

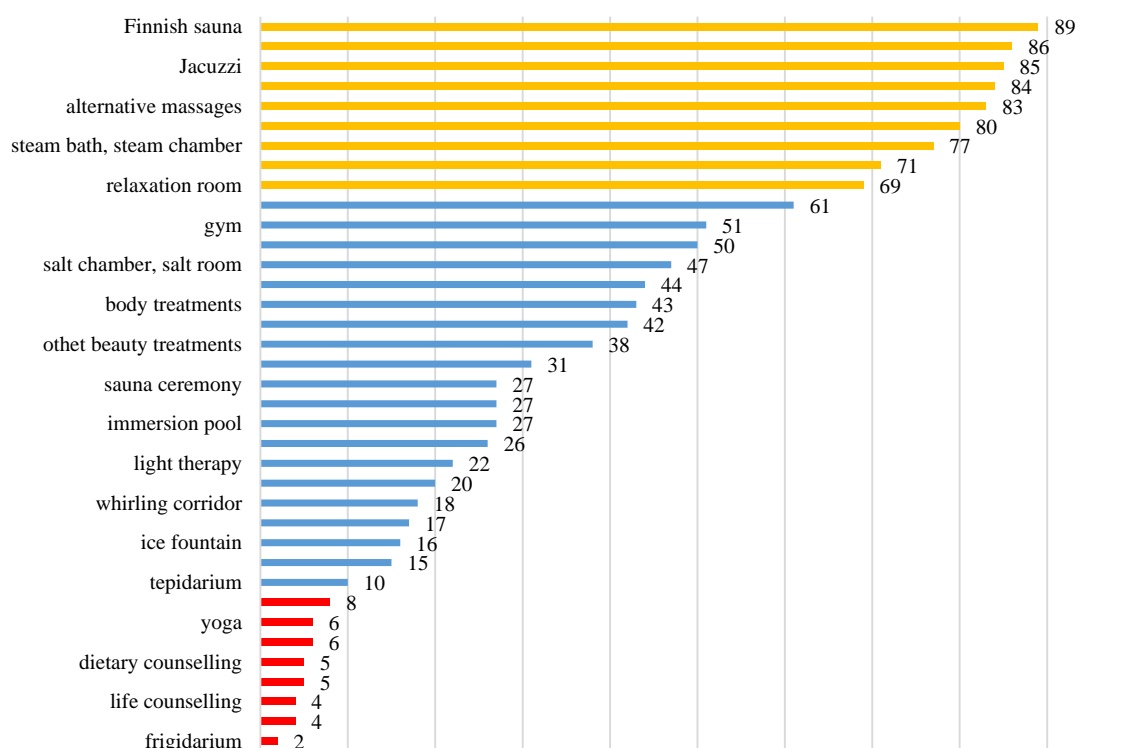


Figure 4. The occurrence of service types in Hungarian four-star wellness hotels (Source: Own database (n=91))

Two major groups of services and four subcategories have been identified when analysing the services offered by wellness hotels (Table 1). The "wellness service group" mainly requires ample infrastructure, while the "selfness service group" requires human resources. From the point of view of their development, the first category of both groups mainly includes services that appeared earlier, while the second category includes services that were introduced later.

Table 1. The categorization of wellness services at Hungarian four-star hotels (Source: Own database - n=91)

Wellness		Selfness	
Classic services	Differentiated services	Massage, treatments	Active, spiritual and holistic services
jacuzzi	salt chamber	classic massage (Swedish, Finnish)	training programmes (nordic walking, etc.)
neck and back hydro massage noozles	aroma chamber	alternative massages	training in gym
hydromassage pool	adventure shower	instrumental massage	yoga
adventure pool	whirling corridor	child massage	movement therapy
Finnish sauna	ice fountain	facial treatments	sauna ceremony
steam bath	hot tub	body treatments	sound therapy
infrasauna, infrachamber	solarium	other beauty treatments (fish pedicure, special cosmetics)	light therapy
immersion pool	cryosauna		ayurveda
relaxation room	tepidarium		mindfulness
	frigidarium		dietary counselling
			life counselling

The inclusion of services in the offering is a strategic decision, with organisational and management implications for the provision of material and human resources. Therefore, the wellness and selfness potential of a hotel resulting from the evaluation of the selected wellness services is also an indicator of market impact. Taking the average of both indicators (wellness sub-profile 9.1, selfness sub-profile 6.3) as an axis, it is possible to draw conclusions on the profile of hotels in terms of services based on their position in relation to the average. The individual points in the coordinate system indicate the position of the hotels. There are several hotels in the same position, and the accumulation of points is not indicated, however the table illustrating the groupings allows the hotels to be followed individually in the categories that have been created (Figure 5). The position of the hotels also makes it possible to identify the main competitors.

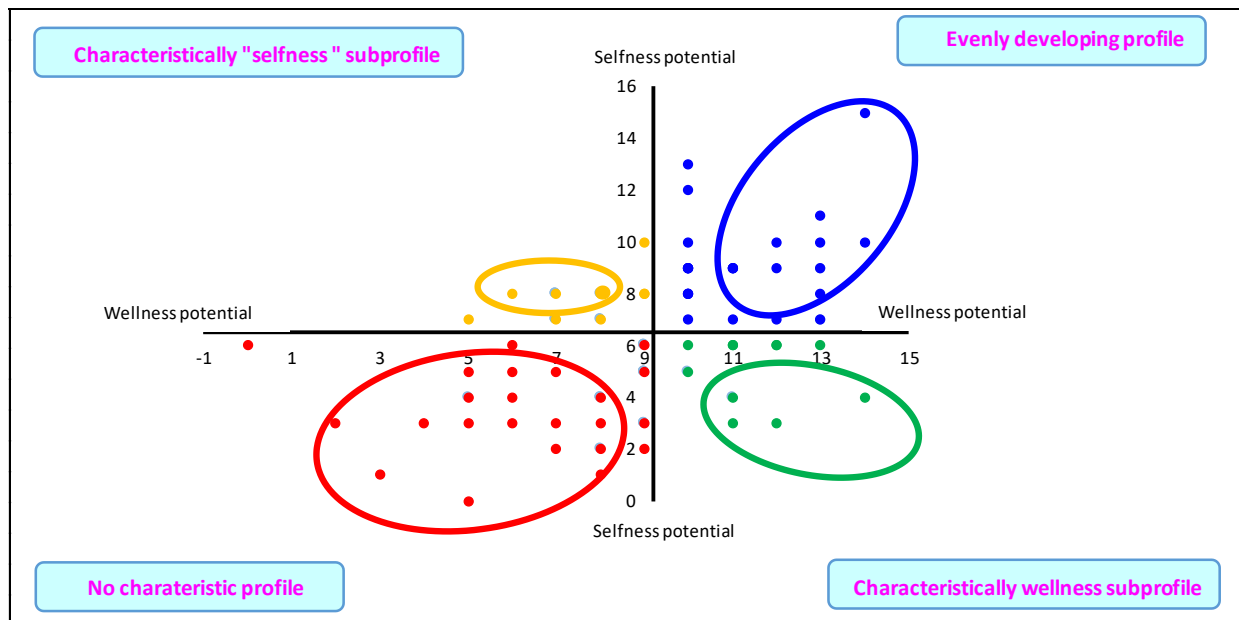


Figure 5. Wellness and selfness profile characteristics of four-star wellness hotels in Hungary (Source: Own database (n=91))

Compared to the axes formed by the average of the potentials, hotels with above average ratings for both wellness and selfness services can be considered as having an evenly developing profile. This includes 29 (31.9%) of the 91 hotels (Figure 5, 6) with a varied spatial distribution. Hotels with a high wellness potential but lower than average selfness potential (13 hotels, 14.3%) more typically belong to the wellness sub-profile group.

Hotels with above-average selfness potential but below-average wellness potential were classified in the group of "more characteristically selfness subprofile" (16 hotels, 17.6%). Hotels with below-average wellness and selfness potential do not show a differentiated profile, so 33 hotels (36.3%) were classified in the group of "no characteristic profile", several of which have services that can be complemented with the existing services at the destination.

Within the established groups of hotels with a steadily developing profile, the diagram identifies hotels with a long history of spa resorts, which, in line with the change in demand, have introduced wellness and then selfness services (e.g., hotels at the traditional spa destinations of Hévíz, Hajdúszoboszló, Zalakaros, Bük, Mezőkövesd).

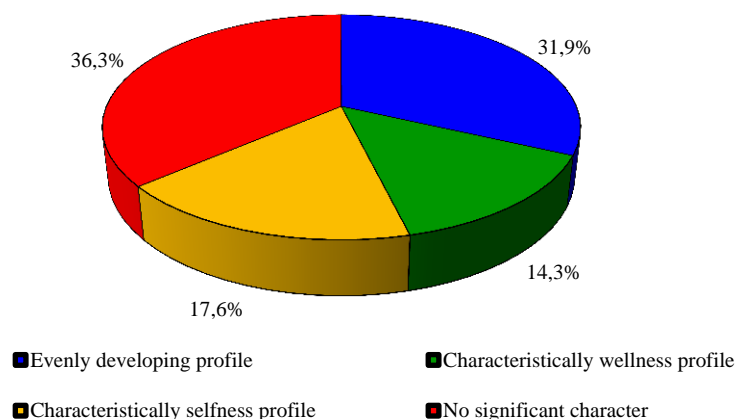


Figure 6. The distribution of Hungarian wellness hotel based on its profile characteristics (Source: Own database (n=91))

In the category with a more typical wellness profile, there are several younger hotels were originally positioned as wellness hotels. Most of the hotels with a typically selfness profile do not have thermal water, so services focus on individual treatments and programmes. Some of the hotels that do not have a distinctive subprofile, but communicate the wellness character in some way, can be classified as resort hotels, or as new and experimental hotels with special services that need further development and differentiation. This does not imply that their customers are not satisfied with the service, but communication could be more effective if these hotels were more clearly profiled.

CONCLUSIONS AND RECOMMENDATIONS

The results of the research suggest positioning strategies for each wellness hotel in terms of product development, depending on the strategy for the target market segments. However, in terms of communication, it is advisable to distinguish between the three branches of health tourism, possibly highlighting medical wellness as the fourth. According to the medical wellness approach it is the guest's own decision to seek medical support, which is likely to determine the success of treatments. Choosing one of the seven wellness profiles and narrowing down the services accordingly is an unfortunate choice, as it would be able to define a very small target market in relation to capacity. Several wellness hotels offer treatments available to the local population, presumably in order to take full advantage of capacity. This could be enhanced by welcoming guests from other hotels.

Taking into account economic considerations, the relative spending of the wellness guest is higher, so aiming for a balanced service profile may be a realistic goal for hotels with a spa profile rather than an effort to increase the number of spa guests. Multi-profiling also allows for greater scope for adaptation, for example to replace guests from the East who have been left behind due to the war. The conscious specialisation and profiling of the product range of spas and health resorts, as well as marketing and sales promotion, can be a further way forward, helping to revitalise the culture of health tourism at home and reposition it at the international tourism market, with a leap in service quality and guest experience. It must be noted that the protection of the natural resources and the maintenance of a relaxing, pleasant and safe physical environment are prerequisites for a competitive and sustainable health tourism destination (Szöllös-Tóth & Vargáné Csobán, 2021). It can be concluded that traditional medical spa tourism in Hungary may not be seen as a successful sector any longer due to a declining and price-sensitive customer base and stagnating health insurance subsidy levels. Wellness hotels should strive to become more than just hotels with some wellness services, but to become wellness hotels, either with traditional relaxation, or differentiated innovative services, focusing on more conscious selfness and comprehensive holistic services with a unique profile.

The integration of physical activity as part of wellness tourism could also increase the positive impacts of tourism and lead to the tourists' greater satisfaction level (Khunnikom et al., 2025). Consequently, a well-established strategic decision is required from the hotel management on the composition of the service mix, a change of the image and a renewal of communication in order to target new market segments (Kóródi, 2023).

In conclusion, health tourism in Hungary has proven its resilience to environmental, economic and social challenges, but continuous transformation is inevitable for Hungarian medical and wellness hotels to remain appealing for both domestic and international visitors.

Limitations of the research and future research agenda

The first limitation of the study arises from the imprecise nomenclature of the Hungarian hotels, since the actual profile of the hotels is not always clearly communicated, and the terms "wellness", "spa" and "medical" hotels are not coherently applied. Consequently, the comparison of the services was not implemented in relation to officially approved standards, but according to the benchmarking system of the present research.

As the unification of the national certification system is still in progress, the unambiguous nomenclature of wellness and medical hotels is expected to be introduced in the future, which may require conducting the study at a later date.

Secondly, this study was implemented in Hungary, where health tourism is the major tourism product and has its distinctive features. The findings of this research may not fully apply to the hotel industry of other countries as they follow diverse policies and practices, therefore international wellness hotels should be examined from a global perspective.

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