

# **Budapest – from the viewpoint of cultural tourism**

A Study by the Budapest Cultural Work Group

*The results and experiences gained from studies regarding the cultural habits of foreign tourists visiting Budapest are of major significance in many respects. On one hand, they provide information to cultural institutions and museums on what kind of exhibitions and programs tourists are primarily interested in, and what kind of priorities, cultural and ticket purchasing habits they have. This information provides an adequate basis for institutions when determining and developing their cultural palette, as well as when defining a relevant marketing communication. The results of the surveys provide feedback on the cultural events Budapest has to offer, analyzing the quality, diversity and standard of the programs. Additionally, this is the first study that examines the habits of tourists interested in visiting or having already arrived in Budapest broken down to destinations, based on questions compiled according to the demands and expectations of the city's cultural institutions. This data has a key role in the accurate definition of the cultural sectors, and as such in the development of the activities and the marketing work focusing on cultural tourism of the BTH Budapesti Turisztikai Szolgáltató Kht. (BTH Budapest Tourism Office, Kht.). It also facilitates in planning the specific steps, projects and promotions in cooperation between the cultural institutions and BTH.*

## **1. The Premise of the Study**

BTH Budapest Tourism Office Kht. and the Palace of Arts established the Budapest work group in June 2008 with the purpose of providing an umbrella for cultural institutions playing a defining role in the touristic palette of Budapest. At the same time, we are hoping to conduct a more intensive marketing work than before, primarily focusing on abroad. The two organizations initiating the meeting deem that the more pronounced appearance of the cultural palette of Budapest and the common promotional would significantly increase the city's competitiveness.

The work group originally formed by 8 and now increased to 14 members established the need for a survey that would study the cultural interests and demands of foreign tourists visiting the Hungarian capital.

## **2. The Objective of the Study**

The objective of the study, as mentioned above, is gaining an insight into the cultural habits of foreign tourists interested in or already visiting Budapest. The topics of the study were the following:

- **Motivations for the visit**
- **The attractions of Budapest**
- **The information sources consulted for the trip**
- **The preferences of cultural programs**
- **The preferences of exhibitions**
- **How much the cultural palette of a city influences choice**
- **The planning of the trip's programs, ticket purchasing habits**
- **Mapping of cultural habits (cultural activities, interest, demands, visiting museums, time spent)**
- **The place and role of the Budapest Card**
- **The evaluation of the cultural palette of Budapest, its characteristics (events, diversity, standard, foreign language info, service facilities, access, price-value ratio).**

## **3. The Method of the Study**

The study, begun in the summer of 2008, is based on two kinds of surveys, as the work group created two questionnaires targeting two different groups. One is available for download at the BTH web site, the other is an offline version intended for on-site use. The online questionnaire targets "potential foreign visitors" interested in or open to visiting Budapest, while the on-site questionnaires inquire about the opinions of foreign tourists staying in Budapest at Touriform offices and at cultural institutions. Some descriptive data from the study:

- **Groups of data recording:** Age, nationality, motivation, Budapest Card
- **Number of questionnaires filled out online:** 5,901
- **Number of questionnaires filled out offline:** 522

- **Study period:** June 2008 - January 2009
- **Period of questionnaires and data recording:** August 2008 – October 2008
- **Initiative to fill out questionnaire:** “Win a weekend” raffle for a two-day trip to Budapest for two persons

In addition to the attractive draw game, the large number of participants is also owing to the active marketing work, as the online questionnaires posted on the BTH web site were also posted on the web sites and published in the newsletters of the cultural institutions, the Hungarian Tourism Zrt., Malév Zrt., as well as Funzine magazine.

In addition to the questionnaires filled out online, the personally handed out and filled out questionnaires also played a significant role in the study, whereby we are able to learn the opinions of tourists already staying in Budapest. Although there are common or commonly evaluable points in the two types of questionnaires, the compilation, content and target of the questions differ in the on-site questionnaires.

The composition of the participants is very favorable both with the online version, as most of them belong to the 25-35 and the 36-55 age groups, which mostly represent the active earners. However, the opinion of a significant number of the younger demographic can also be felt through the on-site version. With respect to the national composition, we also gained reliable data, as participants from the main sending countries were represented in large numbers.

## **4. The Results of the Study**

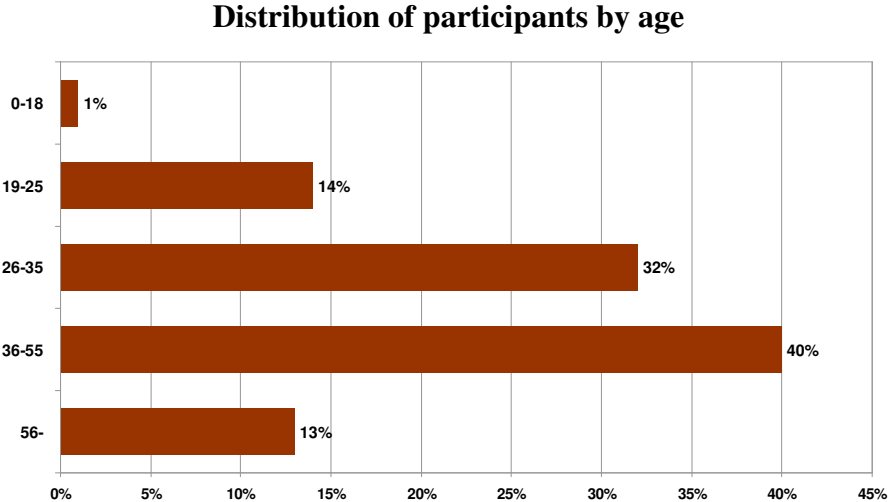
*The results of the study were analyzed according to age groups, nationality, motivation, as well as according to answers relating to the Budapest Card. This report is describing the main results of the aggregate as well as the nationality-related breakdown.*

### **4.1. AGGREGATE RESULTS**

Based on the aggregate online and offline results, 72% of the participants belongs to the 26-36 and the 36-55 age groups, which mostly represent the active earners. Within that, most questionnaires were filled out by participants in the 36-55 age group. This is primarily

contributed to participants filling out the questionnaires online. This demonstrates that this age group uses the internet most frequently and plan their trips, book tickets and accommodations and reserve programs online. In the case of personally handed out questionnaires, a relatively even distribution can be observed. In comparison with the online participants, a surprisingly large number of younger, 19-25, people (26%) and older, over 56, people (19%) participated, so reliable data was gained for these age groups.

*graph 1*



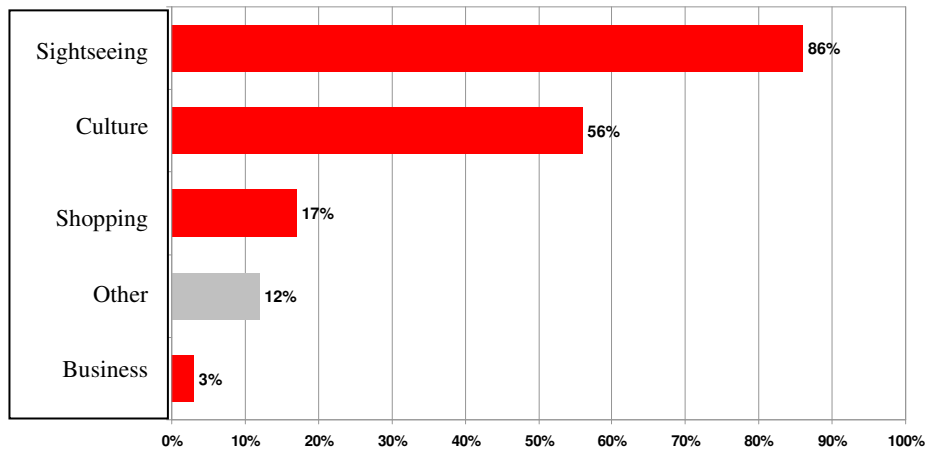
Source: Cultural Work Group, 2008

The *nationality of the participants* mostly corresponds with the main sending markets of Budapest tourism. Additionally—considering the Budapest visitor count statistics of 2008 (Central Statistical Office, February 2009—a conspicuously large number of answers came from Italy, Spain, Switzerland and Belgium.

One of the goals of the study was to learn about the travel motivations of the cultural tourists. The results expressly show that *the main motivation of the travel* is sightseeing and culture. The vast majority of the participants (86%) checked off sightseeing, and more than half (56%) checked culture. Sightseeing was selected as main motivation primarily by online participants also (88%), so further creative marketing solutions should be applied for this target group on the web sites (*Graph 2*).

*graph 2*

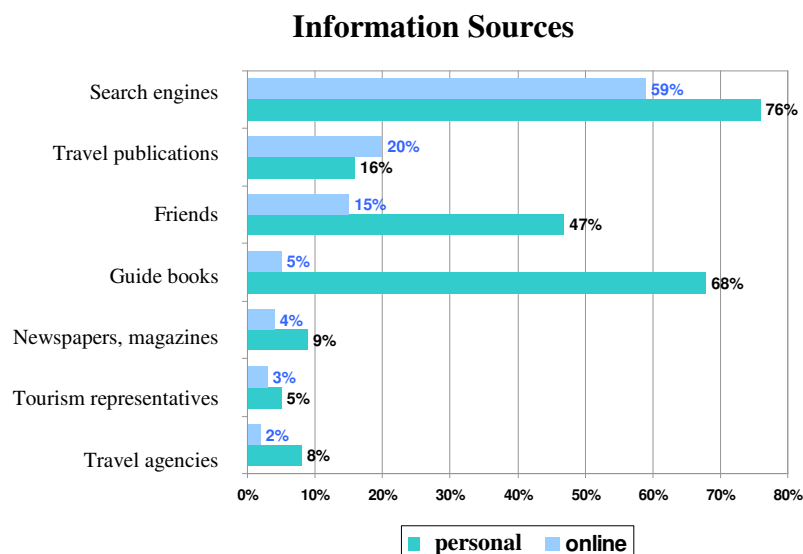
**Motivation for the visit**



Note: Several options could be selected. Source: Cultural Work Group, 2008

One of the most important questions of the study examined *the method of information search*. It is not a surprising result in this topic that the majority of the participants (59%) was directed to budapestinfo and other tourism and cultural web sites listed in the questionnaire by search engines. It is to be noted, however, that the results of the on-site questionnaire also indicate that the internet is the most favoured (76%) information channel used before travel by foreign tourists, followed by guide books (68%). Additionally, information and accounts received from friends and acquaintances remains a defining method, which was selected by 46% of the participants.

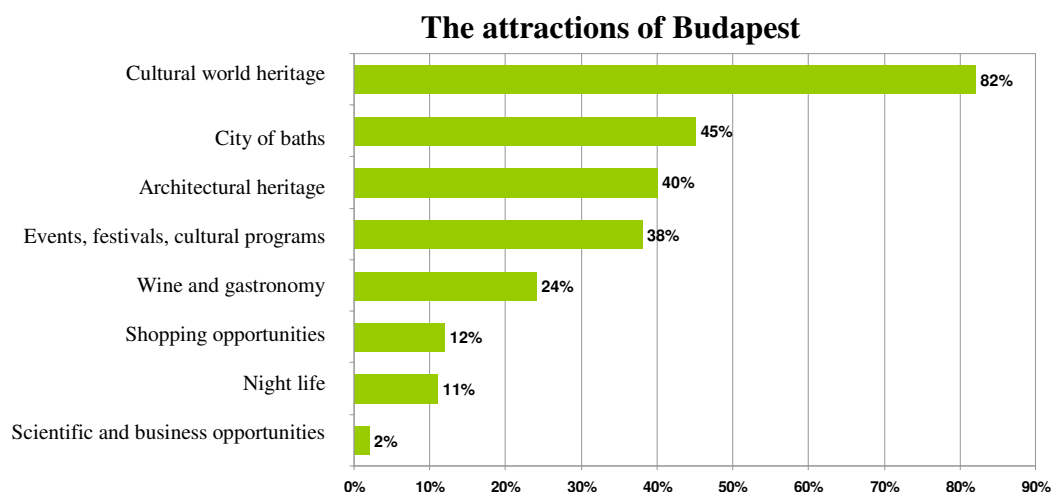
3. graph



Note: Several options could be selected. Source: Cultural Work Group, 2008

Determining the motivation of foreign tourists to visit Budapest and defining the most significant attractions of the city is crucial for the development of an effective marketing communication. Of *Budapest's attractions*, culture and world heritage, selected by 82% of the participants, led the list, followed by the baths (45%), and the architectural heritage (40%). Events, festivals and cultural programs represent a significant source of interest in Budapest (38%), as do the wine and gastronomic offers (24%). The results of the online questionnaires indicate that the architectural heritage impressed the tourists already visiting Budapest even more (*Graph 4*).

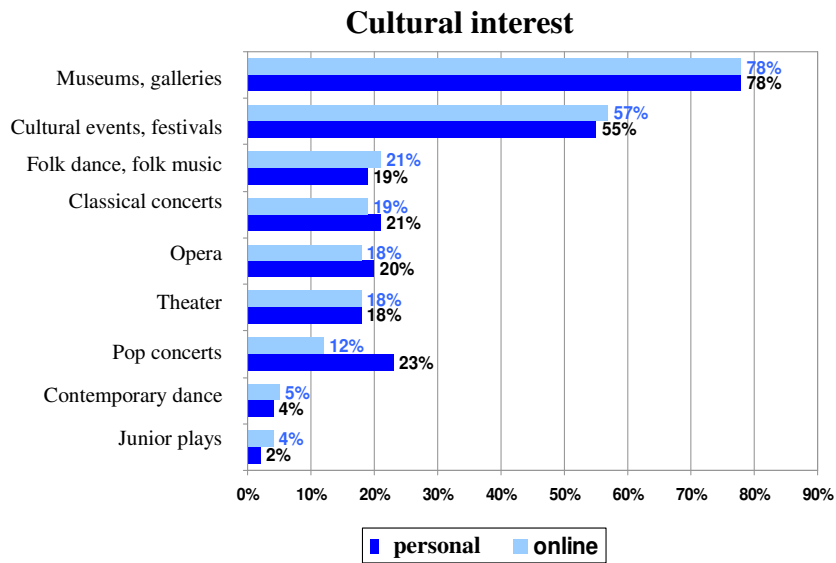
graph 4



Note: Several options could be selected. Source: Cultural Work Group, 2008

Learning about the cultural behavior, demands and habits of the visitors plays a significant role when studying the travel habits of cultural tourists. Therefore, the study examined the *cultural interests* of the tourists separately; namely, what type of cultural programs and exhibitions they are most open to, and how much the cultural palette of a city influences their choices. Of the *cultural programs*, visiting museums is a saliently important activity pursued by tourists, selected by 78% of the participants, followed by cultural events and festivals, indicated by 57%. Folk dance and folk music represent great interest (21%), as do classical concerts (19%), opera (18%) and theatrical performances (18%), as well as pop concerts, this latter being largely reflected by the on-site questionnaires (23%). This is partly due to the fact that the on-site questionnaires were filled out by more young people (19-25 age group) in comparison with the online version.

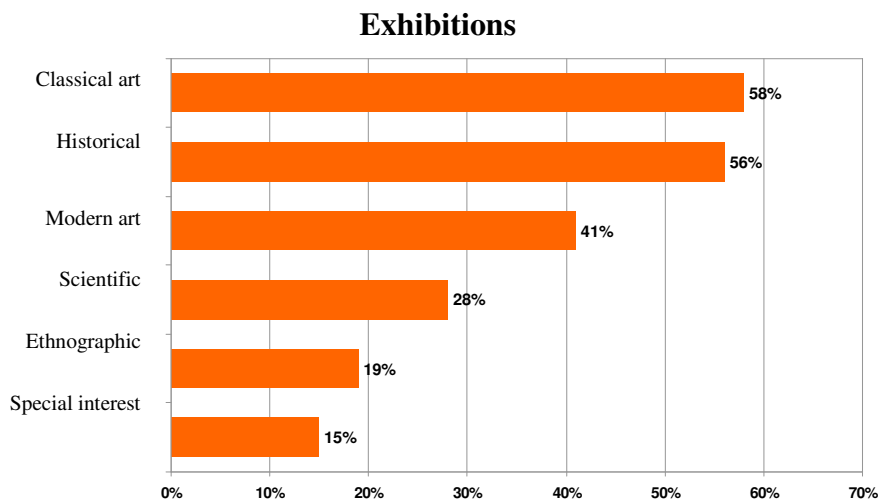
graph 5



Note: Several options could be selected. Source: Cultural Work Group, 2008

With respect to the topics of *exhibitions*, it may not be surprising that the classical topics were selected by most (58%), almost matched by the motivation to view historical exhibits (56%), followed by interest in modern arts (41%), scientific (28%) and ethnographic (19%) exhibitions. Comparing the data of the intensity of interest with the estimated foreign visitors of each museum (Central Statistical Office, Statistical Reflection, August 2008), it can be seen that we have unused sources in relation to the latter.

graph 6



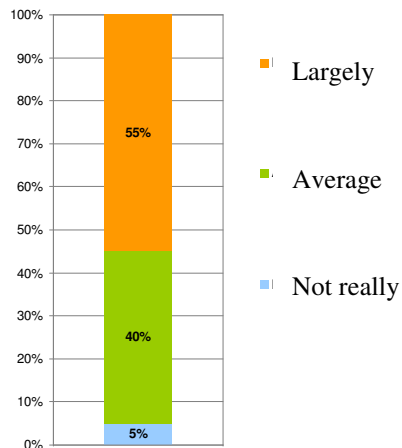
Note: Several options could be selected. Source: Cultural Work Group, 2008

The questionnaire included *museum visiting habits*, which revealed that 54% of the participants visit museums several times a year, and 57% of them visit one-two museums, while 40% visit three or more museums during a stay. The time spent in the museum tends to be one-two hours on average (60%), while one third (37%) spend three or more hours in a museum.

With respect to *cultural events and concerts*, 57% of the participants (online only) attend several times a year, while more than half are interested in a concert program indoors in the summer in Budapest. This indicates that indoors, air-conditioned cultural venues would also be needed where high-standard concerts and performances could be attended by foreign visitors in the city. More than half (55%) are highly interested and 40% are interested on an average level in what a city has to *offer* in the *cultural arena* (*Graphs 7 and 8*).

*graph 7*

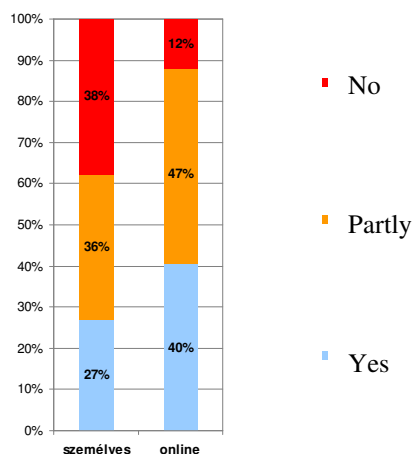
**Destination selection and travel plans: How much is your destination selection influenced by the cultural palette of a city?**



Source: Cultural Work Group, 2008

graph 8

**Destination selection and travel plans: Do you plan before your trip the kinds of programs in which you intend to participate?**



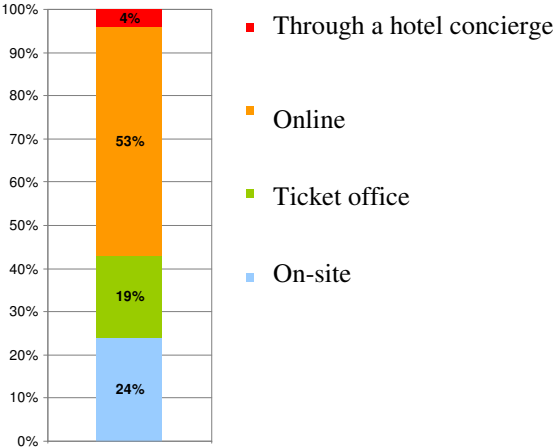
Source: Cultural Work Group, 2008

One of the most important objectives of the survey was to learn about the *methods of travel planning* and the *ticket purchasing habits*. The answers of the participants reveal that 47% of those intending to travel plan their programs partially before the trip, while 40% plan them entirely. Interestingly, the on-site questionnaires reveal that the majority (38%) did not or only partially (36%) planned their programs. This indicates the potential the cultural and touristic industry still has in providing local tourist information, raising awareness and featuring promotions.

*Ticket purchasing habits* indicate an increasing tendency to make reservations and purchases online. The aggregate results indicate that the majority (53%) of respondents prefer purchasing online, while a minority prefer buying tickets at the event venues (24%) or through ticket offices (19%) (*Graph 9*). It is to be noted that 80% of the participants would be interested in a cultural package that would include several cultural activities (concert tickets, museum tickets, opera or theater tickets). This reveals that a cultural cooperation among the institutions may play a significant role in connecting items on the palette (*Graph 10*).

*graph 9*

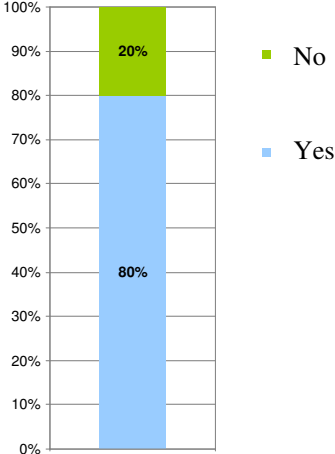
**Ticket purchases and packages: What type of ticket purchases do you prefer?**



Source: Cultural Work Group, 2008

*graph 10*

**Ticket purchases and packages: Would you be interested in a promotional package that would include several cultural programs?**



Source: Cultural Work Group, 2008

One of the most important products of the BTH Budapest Tourism Office Kht., as well one of its most effective tools of city promotion, is the Budapest Card. The Budapest Card includes a collection of what Budapest has to offer in the touristic and cultural areas, providing a guideline to tourists to Budapest—which is why it was so important to gather and evaluate opinions related to it. The majority (58%) of online participants had not heard of the *Budapest Card* but were greatly interested. A very positive feedback could be sensed from the on-site questionnaires: One fifth of their participants know and purchase the Budapest Card.

The on-site questionnaires provide an opportunity to gain an overview of the *cultural palette* and of its standard in Budapest. The answers reveal that the standard of the touristic and cultural attractions offered in Budapest (programs, exhibitions) were deemed good, but the foreign language information and the service facilities (restrooms, ticket windows, shops) were rated average by the tourists. The accessibility of the venues and the price-value ratio were rated good.

#### **4.2. RESULTS ACCORDING TO NATIONALITY**

The examination of the results based on *nationality* is of extraordinary significance, as it provides an opportunity to examine the areas of interest and the cultural consumption habits of the tourists interested in visiting or already staying in Budapest broken down by countries, in accordance with the demands and expectations of the cultural institutions of the capital. These results show by nationalities what the citizens of the countries (eight, which are also the most important sending markets of Budapest) participating in the survey in the largest numbers find most interesting in the city, what kinds of exhibitions they visit and how frequently, how they choose programmes, what kinds of ticket purchasing habits they have. Knowledge of the interests and travel motivations of each nationality is especially important in defining the foreign language materials (web site, publications, captions) of the institutions.

The characteristics significantly differing from those typical for a given country only indicate the results that deviate significantly or conspicuously. In cases where results in close proximity to the average were shown, no separate details were submitted. The data broken down by nationality show great differences both in motivation and attraction, as well as in the area of cultural and ticket purchasing habits, among the various countries.

Examining the *attractions*, it is evident that the Spanish and the French equally show a great deal of interest well beyond the average in the baths and architectural heritage of Budapest. The latter is very attractive for the visitors arriving from the U.S. also, while the interest of the Italians in these attractions fall significantly below the average. This is partially explained by the fact that the Italian participants were from the younger age group (19-25) in comparatively greater numbers, whose center of interest does not necessarily focus on the architectural heritage. On the other hand, it may also be attributed to the fact that their home cities boast superior architectural heritage.

It is worth noting when analyzing the *motivations* of each country that shopping represents an above-average motivation for Skandinavian, German and Austrian visitors, while the role of culture is salient among the British and French tourists.

The *cultural palette* of a city (Budapest) is expressly *determinative* when selecting a destination by French travelers (13% above the average); nevertheless, Italian and American tourists select along similar lines.

When examining preferences in *program selection*, significant differences in comparison with the average can be observed among the various countries. The Spanish and the French specifically enjoy attending the opera; classical concerts are preferred by the Americans, the French, and the Scandinavians; while pop concerts are most popular with the Brits, the Austrians and the Germans. Folk music and folk dance represent a surprisingly strong attraction in the aggregate results also, but it is equally evident from the country-by-country breakdown that the American and French visitors like folk music and folk dance the most. Accordingly, they may represent very important target groups in this future in this genre.

With respect to the *topics of exhibitions*, it is surprising that the classical arts and historical exhibitions lead in case of every country, but it is also an important result that the interest of the Americans in historical exhibitions goes well above average, which it exceeds by 16%.

Italians enjoy modern art also, while exhibitions of the natural sciences greatly attract American, Scandinavian, Italian and Spanish tourists.

The greatest *museum goers* are the French and the Spanish, representing a larger numbers in comparison who like spending three or more hours at a visit in the museums.

Significantly great differences can be observed in the *ticket purchasing habits*, which reflect the kinds of methods most popular in their own respective countries. In addition to online purchases—which led the list everywhere—, the Italians prefer purchases through ticket offices to an extent above average, while on-site ticket purchase was very popular with

Austrians and Germans. Scandinavians, British and American tourists prefer online ticket purchases by a great deal.

In *Table 1* the data summary broken down by nationality is listed, indicating the deviations from the average.

table 1

**Characteristics of tourists visiting Budapest by nationality**

	<u>Italian</u>	<u>Spanish</u>	<u>German</u>	<u>French</u>	<u>British</u>	<u>Scandinavian</u>	<u>American</u>	<u>Austrian</u>
<u>Motivation</u>	<u>Sightseeing</u>	<u>Sightseeing</u>	<u>Culture (+5%), shopping (+8%)</u>	<u>Sightseeing, culture (+7%)</u>	<u>Culture (+7%), shopping (+5%)</u>	<u>Culture, shopping (+23%)</u>	<u>Culture, business</u>	<u>Sightseeing (+7%), shopping (+17%), other (+7%)</u>
<u>Attractions</u>	<u>Cultural and world heritage, events, architectural heritage less important (-25%)</u>	<u>Baths (+16%), architectural heritage (+12%)</u>	<u>Architectural heritage (+9%), wine and gastronomy, shopping (+7%)</u>	<u>Baths (+12%), architectural heritage (+16%)</u>	<u>Events (+5%), wine and gastronomy (+6%), night life</u>	<u>Baths (+10%), wine and gastronomy (+15%), shopping (+21%)</u>	<u>Cultural and world heritage, architectural heritage (+12%)</u>	<u>Cultural and world heritage (+6%), shopping (+9%)</u>
<u>Programs</u>	<u>Cultural events, festivals</u>	<u>Museums, classical concerts, opera (+13%)</u>	<u>Pop concerts (+11%), theater</u>	<u>Museums, classical concerts (+6%), opera (+9%), folk dance, folk music (+7%)</u>	<u>Festivals (+11%), theater (+10%), pop concerts (+3%)</u>	<u>Opera (+6%), classical music (+7%)</u>	<u>Events (+12%), concerts (+10%), folk dance (+12%)</u>	<u>Theater, pop music, children's programs</u>
<u>Exhibitions</u>	<u>Modern arts and natural science topics</u>	<u>Historical (+7%), classical art, ethnographic</u>	<u>Historical, natural sciences</u>	<u>Modern (+11%), special (+11%), classical (+5%)</u>	<u>Historical (+5%), modern (+4%)</u>	<u>Natural sciences, historical</u>	<u>Historical (+16%), natural sciences, classical</u>	<u>Historical (+6%), natural sciences (+9%), special (+5%)</u>
<u>Museum visits látogatás</u>	<u>1-2</u>	<u>3 or more (+7%)</u>	<u>1-2</u>	<u>3 or more</u>	<u>1-2</u>	<u>1-2</u>	<u>1-2</u>	<u>1-2</u>
<u>Ticket purchases</u>	<u>Online and ticket offices (+10%)</u>	<u>Online and on-site</u>	<u>On-site (+9%) and online</u>	<u>Online or on-site</u>	<u>Online (+12%)</u>	<u>Online (+6%)</u>	<u>Online (+11%)</u>	<u>On-site (+14%)</u>
<u>Special</u>	<u>Plan their programs (+6%),</u>			<u>Their selections greatly</u>		<u>Plan their programs (+6%)</u>	<u>Their destination is</u>	

	<u>cultural palette of a city influences their selections</u>			<u>influence d by the cultural palette offered by the city (+13%)</u>			<u>greatly influence d by the cultural palette offered by the city (+6%)</u>	
--	---	--	--	---	--	--	--	--

## 5. The evaluation of the study from the viewpoint of the cultural institutions

The questions and topics of the cultural study were compiled by the demands and expectations of the institutions; therefore, the results provide a great basis for the cultural institutions to define their palette, to determine their cultural sectors, to make individual developments, and to create a relevant marketing communication. It is worth examining the survey from the aspect of the messages carried by the relevant answers for the benefit of each cultural institution.

### 5.1. ANALYSIS FROM THE VIEWPOINT OF THE PALACE OF ARTS

The leading participant in the work group, which cooperated in the original initiative with BTH, the Palace of Arts deems the experience gained from the survey extremely significant from its aspect. The evaluation of MÜPA (the Palace of Arts) points out the invaluable practical implications of the study and the opportunity to renew the cultural palette and marketing.

The fact that 6,423 submissions were provided of the questionnaires in a period of almost three months is very favorable: It reflects a great amount of interest.

The answers do not significantly differ in the case of online participants from those participating in person. Some 40% of the participants represent the 36-55 age group, followed by the 26-35 demographic. Answers were submitted by 19-25-year-olds in 14%, and in 13% by those over 56.

This points out that *a great deal of attention should be spent on the middle aged demographic*. In all likelihood, the kind of programs that cater to the interests of this target group should be placed in primary focus. *Jazz, dance and world music* represent a significant area of demand. The wide palette of cultural programs offered by the Palace of Arts is expressly favorable in this offer package.

The greatest proportion of travel motivation is represented by sightseeing and culture. The offer package of the cultural work group obviously encourages potential travelers to make favorable decisions (Graph 2).

The colorful palette offered by the Palace of Arts is, at the same time, a high-standard representation of the cultural palette of Budapest, which greatly supports the confirmation of the cooperation. Accordingly, it is worth thinking ahead and beginning to develop joint promotionals, be it a joint Christmas program offer or a common summer program palette.

By reinforcing one another and combining the offers (museums, festivals, folk music, classical music, etc.), the programs can be popularized more effectively and visitors attracted more easily (Graph 5). The demand for indoor summer programs is very high, so the work group should compile a program package that will help complete each other's palette.

The cultural palette offered by the city greatly influences travelers in selecting their destination, which is supported by the 55% related result. As the majority of visitors plan their programs ahead of time only partially, it is important that they should be reached after their arrival and during their stay in Budapest.

The cooperation of the work group in this area may also be exemplary, as it provides an opportunity to appear with materials and publications at the Budapest Tourinform offices, as well as the front desks, cash windows and information counters of all of the cultural institutions. In this way, the programs offered by 13 other places will be included in the information available at each one.

As the majority (53%) of ticket purchases take place online, it is evident that it is necessary for our web site to offer exceptional standard and usability, as well as the opportunity of ticket purchases linked to the site. The creation of the "Cultural Budapest" web site, which is going to be the common internet site of the cultural work group, appears to be equally timely. It promises to be a solid point for internet searchers to select from the cultural offers of Budapest as they like. We must make an effort to post and update all of our cultural programs on the completed web site, with additional programs in the city also posted. It is important that our web site would be linked to and accessible from the web sites of as many of our partners as possible, and reliable for information and ticket purchases alike.

It can be established that the tourist visiting the city gather information via the internet, mostly plan their programs ahead of time but remain open to visit newer and newer attractions and programs. We must address them over the web as well as in our publications in Budapest at the same time.

Hungary is located in the heart of Europe and is a safe travel destination for sightseers and tourists. No lengthy preparations are necessary, as there is a strong trust in the city. In fact, the majority of those surveyed deem the quality and the diversity of the cultural palette good. The foreign language information is rated average, and the majority rated the standard of service facilities good.

## **6. Summary**

The objective of the survey was to map out the cultural habits and demands of the tourists visiting or interested in visiting Budapest, their travel motivations, the attractions of the Hungarian capital, as well as the means by which visitors gather information and organize their programs. Based on the results, we wish to conduct more accurately targeted and more effective marketing work both in the individual projects and in the framework of cultural cooperations. The basis for the establishment of the cultural work group and the survey was the premise that culture is an important motivation in travel, and we have significant resources in cooperation, in selecting the appropriate marketing tools and in joint projects.

The survey proved that a cultural trip is the second most important motivation among foreign travelers visiting or intending to visit Budapest (preceded only by sightseeing). The primary source of information for the travel is the internet, although guide books, word-of-mouth, friends, acquaintances remain defining sources of information as well. Among the cultural programs, visiting museums, cultural programs and festivals are the most popular, although there is a great deal of interest in folk music, folk dance, classical concerts, opera and theater productions also. The amount of time visitors spend in a museum tends to span one or two hours for the most part, and in relation to the topics, there is a great amount of interest, in addition to the classical exhibitions, in historical and modern themed exhibitions as well.

Nearly half of the participants like to plan their trips ahead of time at least in part, while 40% of them like to do so in its entirety. On the other hand, the on-site questionnaires reveal that in reality very few actually plan their programs in advance, or only do so partially, so local promotions play a significant role. The prevalence of online purchases can be observed when examining ticket reservation habits, but by-country breakdown reveals that this method is still not so popular in certain countries. It is well worth thinking in terms of

joint cultural programs, as the vast majority of the participants would be interested in a cultural package that includes several different cultural programs.

According to the opinions of tourists, the cultural palette of Budapest and its diversity and standard can be rated good, but foreign language information and the standard of the service facilities still need improvement.

In the current economic situation, the greatest losers may be sightseeing tourism among the types of trips conducted for pleasure. For this reason, studies focusing on culture are even more valuable, as they can help define the certain target groups, in this case, the target groups and demands of cultural tourism. This plays an invaluable role for BTH and all of the participants of cultural tourism in planning an effective marketing communication. At the same time, the current results provide a guideline for all 14 members of the Cultural Work Groups in determining the directions to be taken and how to reach the certain target group most effectively in each given country.

BTH supports these and similar efforts and initiatives with its entire marketing system, since the only way out of the current critical situation is found through cooperation, specific measures, and in marketing work and results that can be used well and effectively.

*For further information on this study and on the Cultural Work Group visit [www.culturalbudapest.com](http://www.culturalbudapest.com).*