

## Túrturizmus és alternatív szálláshelyek – új trendek a budapesti szálláshelypiacon

### Absztrakt

A tanulmány azt kívánja felmérni, hogy a túrturizmus milyen hatással van a budapesti szálláshelypiacon. A túrturizmus jelensége – Butler (1980) desztináció életciklus-modellje szerint értelmezve – stagnálási időszakot hozott az érintett turisztikai desztinációk számára. Ebben a helyzetben, a Doxan (1978) Irridex index irritációs szakaszában a helyiek gyakorlatilag mindenért a turizmust kezdik hibáztatni. Ebből a nem fenntartható helyzetből csak állami támogatással és a fenntartható turizmus fejlesztésével lehet kiutat találni. A tanulmány célja Budapest szálláspiacának elemzése, a fenntartható turizmust támogató kezdeményezések bemutatása, valamint az alternatív szálláshelyek megítélésének ismertetése egy kérdőíves vizsgálat eredményei alapján.

**Kulcsszavak:** túrturizmus, hotel, Airbnb, fenntartható turizmus, turisztikai iparág

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## Overtourism and Alternative Accommodations – New Trends in the Accommodation Market of Budapest

### Abstract

The study seeks to survey what impacts overtourism has on Budapest's accommodation market. The phenomenon of overtourism has brought along a period of stagnation – as interpreted along Butler's (1980) model of destination life cycle – for the touristic destinations involved. In this situation, in the Doxan (1978) Irridex index's irritational stage, locals start to blame tourism for practically everything. Out of this non-sustainable situation a way out can only be found with the help of state support and through the development of sustainable tourism. This study aims to analyse Budapest's accommodation market, introduces sustainable tourism supporting initiatives, and describes the perception of alternative accommodation as shown by the results of a questionnaire study.

**Keywords:** overtourism, hotel, Airbnb, development of sustainable tourism, tourism industry

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### From overtourism to Airbnbs

In 2018, “overtourism” appeared in Budapest as a new concept affecting the tourism industry. With the rapid spread of the phenomenon, a significant increase in the number of visitors and guest nights can be detected in the capital, so this the settlement dominates the domestic tourism market in Hungary, taking into account the visits of foreign tourists.

As a result, the relationship between the tourist space (Michalkó–Rátz 2007) and society seems to be transforming in Hungary, the country is becoming increasingly divided into tourism in the “capital” and the “countryside”. The fact that travel has become cheaper, world tourism has become completely globalized, digital internet technology has become available to everyone, cheap discount airlines have become widespread, Airbnb accommodation easy to book, simple online booking systems have improved, and the number of Asian and American arrivals also started to grow rapidly. The phenomenon of overtourism in cities is linked to the transformation of the travel habits of generations Y and Z. In addition to party tourism, these age groups prefer to look for everyday experiences, and local lifestyles come to the fore.

Currently, the development of quality tourism in the capital is counteracted by the phenomenon of overtourism. HOTREC (2018) identified five factors closely related to the development of the phenomenon as an explanation for the development of overtourism. Among the indicators, the organization blames Airbnb and the Y and Z generations with the bucket list the most for the situation. According to our survey, a party tourist arrives in our capital for a weekend, is happy to use the services of a discount airlines and sleeps in an Airbnb. They don't usually visit other settlements except the capital but want to see as much of Budapest as possible during their time here. A further problem for the hotel industry and quality tourism is the continuous strengthening of the “private accommodation” (Airbnb) of the municipality, which also advertises itself online (e. g. on [www.booking.com](http://www.booking.com)).

## Development of the accommodation market

The objectives included the analysis of the accommodation market in the capital, and thus the situation of the private housing market. With the development of overtourism, Airbnbs are a real big competitor for hotels in the capital. The rise of other accommodations has caused significant declines in the number of guests and guest nights in one- and two-star hotels.

Apart from the segregation by star rating, the number of foreign guests shows a very high increase for hotels in Budapest (their number increased by almost 1.3 million between 2010 and 2017). It is true that their average length of stay is still low (2.4 nights), but the number of guest nights spent by foreigners has doubled during this period. Between 2010 and 2017, the number of domestic guests (by 183 thousand) and guest nights (by 302 thousand) in commercial accommodation establishments also increased, the length of stay is still very low (1.9 nights). With regard to other

accommodations, both the number of foreign guests and the number of guest nights spent by them also doubled compared to 2010. The length of stay was the highest in 2012, which is an enviable figure for even the largest tourist countries (4.3 nights). (KSH, 2020)

The number of domestic guests started to grow strongly in other accommodation establishments, especially the year 2017 is outstanding (from 138 thousand in 2016 to 211 thousand in 2017). However, the average length of stay here has also fallen back to the national average (2.5 nights), which shows that tourists come to the capital several times but spend a short time there (long weekends) (KSH,2020).

The number of operating commercial accommodation establishments shows a significant increase compared to 2010, if we add the 15 hotels to be handed over in the near future, 56 new hotels have been handed over in Budapest in the last nine years. Similarly, the number of rooms available for rent next year will increase from 20,000 to 24,000, which would mean that 5,000 new rooms have been created in the capital in 3 years as a result of overtourism (KSH 2020).

According to the data of the Association of Hungarian Hotels and Restaurants, there are 13 885 rooms among other accommodation establishments, 9000 of them are Airbnb rooms and 4 885 are apartment houses. According to other surveys (Jancsik et al. 2018) 19 498 Airbnb and 10 576 users deal with renting private homes. It is a fact that not all Airbnb are registered with local governments, however, the new NTAK database will also require them to register with the Hungarian Tourism Agency. The number of beds, rooms and catering shows a very dynamic increase compared to 2010. The phenomenon of overtourism can be detected here since 2016.

## New hotel concepts

In the new situation, the tourism industry sees opportunities for further development in building quality sustainable tourism. The hotel industry has embarked on the path of sustainable tourism development, their most important goal is to diversify the demand in the given destination and to try to attract higher qualified tourists spending more money in Budapest. In the field of tourism, we find most of the trademarks in the field of accommodation, in Europe the hotelstars rating is also the best known. The trademarks classify each accommodation with a star, crown, sunflower and backpack, and their operation promotes the development of quality tourism (Remenyik 2016).

The Judging Committee of the Hotelstars National Certification Mark has already rated 370 hotels out of 712 hotels registered by the Association of Hungarian Hotels and Restaurants.

The Association plans to introduce new brands, starting with the family-friendly brand, which consists of 91 points and a system covering the entire operation and approach of the hotel.

The green hotel trademark is an eco-label that implements the design of “responsible hotel, responsible tourism”. The eco-label was launched by the Association of Hungarian Hotels and Restaurants in 1993 to protect the environment. From energy and water savings, to waste management, reduction and recycling, to informing guests and the Do Not Disturb package included detailed aspects for hotels to set up their own environmental teams and start working as best as they could. ([www.hah.hu](http://www.hah.hu), 01. 07. 2020).

The concept of the eco-label covers a voluntary certificate of a certain level of environmental performance. Its award is based on objective criteria and can be obtained by any product, manufacturer, or service provider that meets the prescribed conditions at a given time (Buckley 2002).

Eco-labels encourage entrepreneurs to pay more attention to the requirements of environmental, social, cultural and economic sustainability in their activities, and to behave responsibly towards their environment. Ecolabels are able to differentiate products and services that meet higher environmental, social and economic standards than required by law. This distinctive label allows consumers to make an informed choice about a certified product, and companies that manufacture and sell it can gain a competitive advantage ([www.unwto.org](http://www.unwto.org), 20. 07. 2020).

In recent years, the green hotel award has been won by Hunguest, the hotels of the Accor group (<http://www.hah.hu/csr/zold-szalloda/zold-szalloda-palyazat-nyertesei>, 28. 05. 2020). Large international hotel chains seek to achieve CSR (Corporate Social Responsibility) objectives through projects built into their own standards. In this, environmental and climate protection is just one slice, the responsibilities of each chain mention a number of other areas among their goals, such as condemning the exploitation of children, working with local communities or avoiding fish sourced from overfishing in their restaurants. Such a corporate trademark has become Accor Hotels’ Planet 21 program or the IHG hotel group’s Green Engage system.

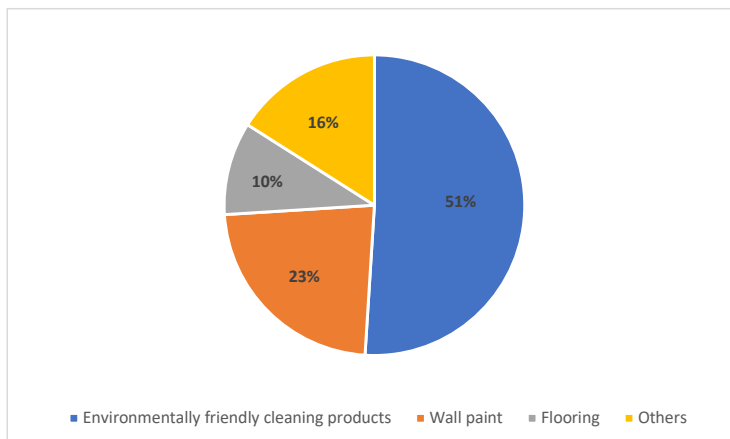
Novotel hotels, for example, have FCS wood beds and bedding made from recycled bottles, but the cleaning products as well as the bathroom soap come from an environmentally friendly source. The IHG has divided the Green Engage program into four levels. The first level is mandatory for all 5,500 hotels in the group and involves planning for energy consumption efforts. This includes monitoring energy costs and building energy-efficient lighting. Hotels that reach the second tier already see the

benefits of sustainability and, for example, have introduced sustainable sourcing into their day-to-day processes. The third level requires sustainable building management and energy management. And the fourth-highest hotels were able to reduce their energy use by 25% with their modern and thoughtful efforts. “From smart design and the use of innovative systems, every single thing our hotels do for sustainability can make a big difference to our planet. Staying in our hotels means you are part of a global effort to protect our environment” – adds as a conclusion the description of the IHG program (IHG website, 01. 03.2020). The program includes a web interface accessible to hotels where energy, water and garbage can be tracked and reported, the unit’s carbon footprint can be calculated, and the system includes recommendations for greening the hotel and return on investment, also to engage guests to achieve goals.

The Accor hotel group aims to use healthy and high-quality ingredients from local producers in its restaurants, as well as to reduce the amount of food waste (Accor Hotels website, 01. 03. 2020).

The Planet21 program pays attention to eco-friendly products (by 2015, 85% of Accor hotels used eco-friendly products, including environmentally friendly cleaning products [51%], wall paint [23%] and flooring [10%]), and water use reduction is important. According to the survey, an Accor hotel uses about 15,000 cubic meters of water per year, 86% of which flows through the kitchen, and Accor hotels have reduced their water consumption by 15% by 2015 compared to 2011. In 2015, 91% of hotels collected and recycled batteries, 91% of them also used the same with fluorescent tubes, and 73% of hotels collected and recycled paper and cardboard. By 2015, 85% of hotels had recovered their own waste (Planet21 program).

*Fig. 1: Elements of the Planet21 program at Accor hotels*



Through the “Plant for the Planet” program, the group has committed to a unique reforestation project. The principle is that guests can reuse towels, which equates to saving half the cost of washing. This amount of money saved is invested in seedling plantations. According to the rule, “5 reusable towels = one sapling”. In 2015, 60% of hotels participated in the “For the Earth” reforestation project. (Planet21 program) Accor has so far planted two million seedlings within the reforestation program with the support of the United Nations.

## Priorities of alternative accommodations

At the moment, Airbnbs tend to strengthen the image of a “cheap destination” for tourists traveling to our capital. The emerging sharing economy system will also have to adapt to the dissemination of sustainable ideas and the development of better quality tourism. The online questionnaire including seven questions was completed by 300 respondents. Half of the respondents declared themselves to be living in a family, a quarter to live alone and a quarter to be in a relationship, so the opinions of all three groups were calculated according to the proportion within the base population.

The term Airbnb was not known to 65% of the respondents, but when they heard the word, the respondents also associated it with an apartment, a key house, and a boarding house, indicating low social awareness and misinterpretation of the word. Many have associated an experience with the word. Reflecting to commercials and billboards of other accommodations, the respondents also thought of the cheaply and long time ago renovated accommodation with old-fashioned furniture. Others remembered the film *Zimmer Feri*, the resorts of Lake Balaton or Hévíz, where the owner moves to the “cellar” for the summer. But there were also who mentioned the newly built, slightly impersonal cottages, which the owners had built specifically for renting purposes. With sentence endings, the fillers revealed what the other accommodation meant to them. There were those who highlighted the function of the accommodation, and those who associated the user, the tourist, modest conditions, a non-adaptive lifestyle, cheapness, sleeping and showering possibilities, i.e. the basic functions of the accommodation service.

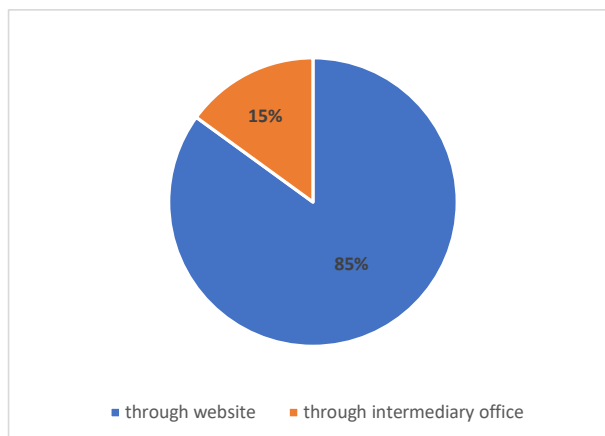
Those who have already used Airbnb ranked the quality and location of the service in the first two places, the price range in the third place, and the supply and brand in the last places with minor differences. It can be stated that the price and location predictions of the responses, as well as the supply and brand relocations, are in line with the characteristics of Airbnb accommodation, provided that their quality is adequate.

When choosing Airbnbs, price was the most important factor influencing the decision. 90% of respondents would be willing to opt for other accommodation services if they apply the right price. And quality is a basic expectation, without which the other factors and advantages of the service cannot prevail. At the moment its judgment is positive, but few have chosen excellent judgment, as many have judged it to be bad, meaning that in order to create a long-term sustainable supply market, it is very necessary to ensure guaranteed good quality. The question of linking price and quality proved that higher pricing of organized accommodation cannot be an obstacle to quality assurance, as respondents are not only willing to pay a higher price for other organized accommodation, but even pay twice as much if the service is truly differentiated in quality.

When asking why they chose Airbnb rather than the hotel, the answer was given, that the choice was made because of lack of hotel capacity or the price. Comfort, better facilities were also cited as reasons: cooking and laundry facilities, undisturbed rest with young children, a friendlier atmosphere, and independence from the hotel agenda. Due to the favorable price, all respondents were inclined to choose Airbnb accommodation service. More people would choose is because of location and longer stay, less because of self-sufficiency and lack of hotel space. In other words, it can be concluded that the benefits of other accommodations in terms of comfort, equipment, integrity and independence can be exploited by applying an appropriate price.

85% of respondents sought an Airbnb for themselves through a website, and 15% used an intermediary office, reflecting the market advantage and demand for organized accommodations.

*Fig. 2: Search dominancy in case of Airbnb*



The majority of respondents would use other accommodation services for a few days or a week. The answers reflect a slightly longer length of stay than in hotels.

Most people would pay 3-4000 HUF – the price of organized accommodation – per person, per night for booking Airbnb accommodation, but a quarter of them would be willing to sacrifice even 5-6000 HUF if the price reflects the quality. However, when the price level reaches HUF 7000 – the hotel price level –, no one is willing to spend on this type of accommodation.

All in all, the Airbnb service received a good rating from the respondents, the best being the price range and accessibility, and the worst being the information, booking and service. 86.7% rated the quality as good.

Among the stereotypes, the accommodation service presented in the film *Zimmer Feri* appeared, according to the respondent, the technique of aggressive hospitality and the depiction of sloppy cleaning no longer cover the reality. However, the landlord's poor language skills, excessive push-ups, the high revenue mentality, and low quality were, in their opinion, mostly in line with what was seen in the film. The manner and appearance of the publisher of the Airbnbs were considered neutral by the respondents, but their financial situation and qualifications were considered to be relatively poor.

The Airbnb accommodation product was judged by respondents to be inadequate in terms of style, quality, selection, design, sales technique, incentive policy, marketing communication style and effectiveness, but gave a good rating on the level of demand satisfaction and pricing. 5-5 external and internal photos were shown to the respondents in order to measure their reaction. Among the external photos of other accommodation, 80% of the respondents chose the image of a downtown apartment house, only 20% of them chose the modern building of Budapest apartments, while the other two photos no one. Among the interior photos, the photos of the hostel were marked by the majority of the respondents, 46.2%, but only 15.4% and 23.1% of the results were found for the other photos of other accommodation. After the image choices, half of the respondents were sure that they had chosen the images well, and only 12.5% said that the photos of the other accommodation could be confused with the photos of the hotel, but the results did not show this.

The majority of respondents imagine advertising other accommodation only on the Internet, by registering on their own website or on an existing website. Several of them mentioned intermediary offices or foreign partner offices. Based on the video advertising characteristics of other accommodation establishments, the respondents considered the quality of the accommodation to be good, outstanding, not typical, but the way of drawing attention was boring, outdated and cheap. The majority supported



the modernization of other accommodation, the appropriate design and advertising application: the transmission of the image of a homely, comfortable, high-quality accommodation. At the same time, this video with a modern tone caused resentment in two respondents, they thought that the modernity is not typical for other accommodations, it is the property of hotels, they shouldn't even try it.

At the end of the questionnaire, respondents summarized the positives and negatives of Airbnb accommodations that came to their mind when completing the questionnaire. Among the positives of Airbnb, the uniqueness and the favorable price range were mentioned, and they were named as a conceivable alternative to a hotel or boarding house. As a negative, the cost-saving aspects of the design of the accommodation, the quick profit-taking and the push were mentioned. The authors underestimated the quality and management communication and sales technique based on the fact that the respondents confused the photos of other accommodation with the hotel pictures, while they were mostly confident in their choice, and did not consider the apartment in the other accommodation video general, but living in stereotypes.

## Conclusions

As a result of overtourism, it can be said that the capacity of four-star hotels could only be further increased in the January period, otherwise they became overcrowded. Five-star luxury hotels continue to perform poorly, and the development of quality tourism, the development of conference tourism and the organization of hotel festivals belonging to the segment could only make a difference. Unfortunately, the Airbnbs will become more competitive against the one- and two-star categories, but there is still hope for the three-star to stop stagnating.

It would be very important to create the uniqueness of hotels, to spread experiential thinking. An Airbnb is incapable of hosting larger events (e. g., weddings, conferences), special in-house services (e. g., wellness, medical, concierge, etc.) and receiving business tourists.

As in many large cities around the world, the phenomenon of overtourism is appearing as an increasingly topical problem in Budapest (Remenyik–Szabó 2019), infrastructure and hotel capacities are overloaded, and their resources are increasingly used, which companies and decision-makers have to respond (HOTREC 2018). Focusing on the environment can be an ideal long-term attempt to break out of massive overtourism, to create and attract a narrower audience that is willing to pay even more for the environment. In addition to guest satisfaction, in the often fierce competition,

a well-thought-out, planned environmentally friendly business policy can also have a positive effect on rationalizing costs and reducing them in the long run.

In the case of larger-capacity hotels belonging to these chains, we can see several difficulties. Standards, which are often set globally, do not follow local conditions, are difficult to refine, and often do not have sufficient resources to achieve their goals locally. Yet, thoughtfully and truly dedicated, in the hands of large hotel groups and chains, it would be a huge opportunity to shape and protect the environment positively and effectively, protect the environment and spread responsibility. A good example of this combination is an offer at one of IHG's Holiday Inn Express hotels abroad: If a guest cancels a daily cleaning, the amount saved will be passed on to charity. It is, even if it seems a trifle, a striking fusion of environmental protection and social responsibility.

Larger hotel chains are in a much better financial position to build sustainable development. The hotel chain, for example, can also motivate and reward guests through its loyalty program if they do something good for the environment, such as giving bonus points in exchange for such offers. The aspirations of the big chains can reach many people, and so with a thoughtful and really effective thought and aspiration, they can achieve great results in this important area not only for our Earth, but for all of us.

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