

Were they able to escape? An assessment of the adaptability of businesses operating escape rooms in Budapest

Csilla Petyko and Adrienne Nagy

*Department of Tourism, Budapest University of Economics and Business,
Budapest, Hungary*

Abstract

Purpose – Budapest is one of the cities where tourism volumes have shown steady and sustained growth yearly from the 1990s to 2020. As a result, alternative tourism products have emerged in the city's offer, in addition to those catering for mass tourism, offering tourists the opportunity to try out their individual interests. One such option for tourists with special interests is the use of escape rooms. The COVID-19 epidemic has put tourism services in a very difficult situation and forced them to make operational changes. The study illustrates these changes through an analysis of the businesses operating escape rooms in Budapest.

Design/methodology/approach – The research used a qualitative methodology, which is well suited to identifying changes and problems in processes. Eight semi-structured expert interviews were conducted with owners and managers of escape rooms. The interviews were processed according to the rules of the double-coding protocol and the results were subsequently analysed.

Findings – The majority of businesses used an effective strategy to survive the challenges of the COVID-19 outbreak, but some of the rapid improvements made during the crisis were not successful and had to be halted later. An interesting finding is that the majority of the operators interviewed so far do not collect and analyse data on the characteristics of their guest flows and therefore plan their improvements based on their own knowledge.

Originality/value – By learning about the operational characteristics of the businesses that run the escape rooms, we gained insight into the practical steps taken to deal with crises and their effectiveness in the case of the businesses studied. Examining the steps taken by tourism businesses to survive can lead to conclusions that will help to develop appropriate response steps for future contingencies.

Keywords Escape rooms, Special interest tourism (SIT), Budapest, Business resilience

Paper type Research paper

Introduction

The evolution and characteristics of tourism in metropolitan areas have long been a subject of interest to researchers in the field. As a result of urbanisation processes, 72.6% of the total population in Hungary lives in cities, and 17.6% of the population is concentrated in Budapest (KSH, 2025). One consequence of urbanisation is the prominence of cities in tourism. Cities and metropolitan areas are home to the majority of tourist attractions, and their appeal, coupled with the extensive services they offer, has transformed them into major tourist destinations.

Visiting cities is one of the fastest growing and long-lasting trends in tourism, with nearly 47% of international tourist arrivals (1.5 billion trips) in 2019 taking place in the Top 100 cities worldwide (Yasmeen, 2019). Consequently, many cities have become destinations for mass tourism, and cities that are of international interest have developed a phenomenon of overtourism. Budapest is one of those cities.



In these cities, demand for alternative tourism is increasingly complementing mass tourism, with a clear increase in the role of specialised niche products. Budapest has been positioned as a destination for cultural tourism, but its offer has been complemented by heritage values and innovative, modern forms, which have led to a gradual transformation of the city's product offer (Rátz, 2015). The tourism sectors of both Budapest and other cities are significantly influenced by the innovative and creative services provided by local businesses. Prior to the emergence of the COVID-19 epidemic, escape rooms constituted one of the most prevalent creative tourism and recreational activities across the globe (Nagy *et al.*, 2018). Consequently, our research concentrated on businesses offering escape room services. Our decision is supported by the fact that Budapest has played a key role in the expansion of escape rooms in Europe.

It is evident that the pandemic period also resulted in a disruption to the Budapest market for escape rooms. It has been observed that a number of businesses have not yet resumed their services following the mandatory closure period. In Hungary, the majority of tourism service providers did not receive any form of state support to help them survive. Among these were the escape room businesses. In 2024, the effects of the pandemic, in terms of restrictions and tourist volumes, were no longer being felt. It is therefore an opportune moment to take stock of the changes that have taken place in the Budapest escape room market. It is crucial to examine the events that transpired, ensuring that all entrepreneurs can draw valuable lessons from the measures taken during the crisis period to ensure survival. It is important to note that even if the pandemic threat has disappeared, new crises continue to impact on tourism, for example, the economic downturn and rapid inflation.

The present research aims to investigate this using the following research questions:

RQ1. What changes has the crisis caused in the way businesses operate?

RQ2. What adaptation strategies have the operators of the escape rooms developed to ensure their survival and future development?

RQ3. Is it possible to identify any changes in the characteristics of the guests of the escape rooms?

The research utilised a qualitative methodology. In June and July 2024, eight semi-structured expert interviews were conducted with owners and managers of businesses operating escape rooms. The content of these interviews was processed, and the results interpreted and analysed. The insights gained from these interviews highlighted the businesses' strategic adaptations to the crisis in the tourism market in the wake of the pandemic, i.e. the measures implemented to ensure their survival. These findings are outlined in this paper.

Literature review

In recent decades, the international tourism market has seen the emergence of alternative tourism products (CCN, 2008) to complement mass tourism in cities. These products have been designed to appeal to those who prefer a more unique experience, or to offer alternative perspectives on well-known attractions. Tourists participate individually or in small groups, some of which are outside the traditional areas of tourism (Michalkó, 2012; Zátori, 2014).

Alternative tourism is considered by researchers to be an umbrella term. Under its umbrella are those tourism products that respond in some way to the demand needs that have emerged as a counteraction to mass tourism, emphasising individual interest and unique experiences (Trunfio *et al.*, 2006; Soleimani *et al.*, 2018; Sumarmi *et al.*, 2020, 2023; Garanti, 2022). This includes special interest tourism (SIT). Special interest tourism has become increasingly popular since the 1980s and has become a major trend in modern tourism. Modern tourists wanted to buy experiences rather than just services, and the search for experiences, the creation

of unique travel experiences, is one of the main drivers of SIT. Special interest tourism is a form of travel in which visitors focus on a particular interest, hobby or special activity and this determines their travel choices. The essence of SIT is that the primary motivation of travellers is not simply to relax or seek a general tourism experience, but rather an experience built around a specific theme or activity (Tauer, 2006).

Special interest tourism refers to travel that is driven by a specific interest, preference or motivation, that provides a personalised experience, and that typically attracts a small number of tourists (niche tourism) (Ma *et al.*, 2020; Sumarmi *et al.*, 2020). These tourists are drawn to destinations offering such niche experiences because they seek to avoid mainstream tourism (general interest tourists, GIT), engage in more specialised activities and have unique tourism experiences based on individual interests (Ma *et al.*, 2020; Zhang *et al.*, 2023). There are many types of special interest tourism, including adventure tourism, ecotourism, cultural or heritage tourism, religious tourism, gastronomic tourism, astro-tourism, sports tourism, and even scientific and educational tourism (Tauer, 2006; Soleimani *et al.*, 2018; Ma *et al.*, 2020; Wen and Wu, 2020; Zhang *et al.*, 2023).

From a supply-side perspective, destinations and tourism services must provide exciting and personalised experiences and choices that meet multiple motivations. As a result, tourists today engage in a wide variety of activities at destinations, including those catering to special interests (Ma *et al.*, 2020). The creativity of tourism service providers has a significant role to play in developing new tourism products, revitalising existing products, and shaping the atmosphere and brand of cities (Richards, 2013; Albert-Tóth and Happ, 2017). All these activities are important for tourism destinations because they generate demand.

One response to these trends in tourism demand is real-life escape rooms as innovative tourism products, which are a popular form of gamification around the world. However, while there are several studies of escape rooms and their role in education, there are relatively few in tourism. The service emerged in Japan in 2007 and conquered all continents in the following decade (Nicholson, 2015). Today, Europe and North America are the largest markets, but Asia and South America are also growing rapidly (Vilar Lama and Garcia Martin, 2021). The market for escape rooms has traditionally been focused on large cities and major tourism hotspots, but there has also been significant growth in the number of escape rooms appearing in smaller towns and cities with notable attractions (Stasiak, 2019, 2022). It has been argued by some authors that “escape roomers” are a new segment of tourists and that “escape tourism” should be acknowledged in destinations’ promotion strategies (Villar Lama and Garcia Martin, 2021). For this reason, our study aims to reinforce the importance of escape rooms as new form of special interest tourism.

One of the reasons for the rapid spread of gamification in tourism is that gamification increases the involvement and engagement of tourists, while offering them an interactive experience. Furthermore, at the destination level, gamification has become a useful marketing tool for destination management to achieve these goals (Mileva, 2023).

According to Pakhalov and Rozhkova (2020), escape rooms fit well with Pine and Gilmore’s (1998) theory of the experience economy. When considered in the context of the experience economy, classic escape rooms fall into the category of “escapism”, through the active participation of participants in the production of the experience and their immersion in the story of the room. For example, when players relate to the story of the escape room, they feel like Sherlock Holmes while solving puzzles that reveal the name of the murderer. It is evident that the manner in which the narrative is presented, the ambience of the location, the calibre of the puzzles, and the collaborative efforts of the team members collectively contribute to the overall experience of visitors.

Escape rooms are attractive to visitors mainly because of their authenticity and the “flow” experience, in which players are taken out of real time and space. Researchers classify visitor experiences into four main categories: room, puzzles, fun and social interaction (friends). They also point out that well-designed themed rooms and narrative elements enhance the experience and thus increase visitor satisfaction (Dilek and Dilek, 2018). Escape rooms have

become increasingly popular on a global scale, as they are tailored to meet the experiential consumer demand and provide participants with an opportunity to step outside their day-to-day routine and engage with an exciting alternate reality (Stasiak, 2016). A larger number of studies have focused on visitor experience (e.g. Pakhalov and Rozhkova, 2020; Nowacki and Stasiak, 2023), whereas we focus on the management and business development of escape rooms.

Several researchers highlight that the themes of the games in the escape rooms are in most cases global rather than local. The themes are often not linked to local culture and heritage, although this could be a potential competitive advantage (Vilar Lama and Garcia Martin, 2021; Stasiak, 2022). However, there are exceptions. The Serious Escape Game (SEG) is a unique initiative that aims to facilitate exploration and learning about local cultural heritage. According to the authors, this type of game can be successfully used in non-formal educational settings, such as museums and historical sites. They can be effective tools for experiential presentation and promotion of cultural heritage (Tzima *et al.*, 2021). In addition to experiential learning, the service has a significant positive impact on society and the economy. This is achieved through the conscious cooperation of participants, as well as the sharing of knowledge and skills, fostering dialogue and resolving conflicts (Pan *et al.*, 2017).

In addition to providing entertainment, escape rooms have become a significant component of the tourism sector, with a third of visitors being tourists. Indeed, there is now a market for “escape room tourists”, who travel specifically to try out different escape rooms in different cities. Successful escape rooms often cooperate with other service providers such as hotels and restaurants (Vilar Lama and Garcia Martin, 2021).

Research methods and data collection

As there is no official data collection on the escape room market, we built a database. Given the fact that the internet is one of the main sources of information for tourists nowadays, we measured the services available in Budapest and their characteristics on online platforms (szabaduloszoba.hu, exitgames.hu, questhunter.hu, TripAdvisor).

In order to ascertain the resilience and adaptability of escape room businesses in Budapest, the following research questions were examined:

RQ1 What changes has the crisis caused in the way businesses operate?

RQ2 What adaptation strategies have the operators of the escape rooms developed to ensure their survival and future development?

RQ3 Is it possible to identify any changes in the characteristics of the guests of the escape rooms?

We opted for a qualitative methodology because qualitative methods are well suited to exploring problems and understanding phenomena. In the initial phase of data collection, we utilised semi-structured interviews with subject matter experts. In June and July 2024, eight interviews were conducted with business owners and managers operating in the escape room sector. The interview data are presented in Table 1.

The interview questions were structured around four main themes. The first theme was to ascertain the interviewees’ professional background and the general characteristics of the service venue or venues. In the second section, questions were posed regarding the circumstances and characteristics of the initiation of escape room businesses. The third section comprised questions to discover the impact of the virus epidemic and the adaptation strategy developed by business owners. Finally, the fourth unit consisted of questions on the operational characteristics experienced in the first half of the year 2024 and plans.

The eight businesses included in the research represent 15.1% of all escape room provider businesses in Budapest, and the 44 escape rooms they operate cover 19.6% of the total.

Table 1. Characteristics of the interviews

The interviewees' coded names	Responsibility	Years of enterprise activity	Number of escape rooms	Date of the interview
Miklós	owner	12	8	17.07.2024
Imola	owner	17	2	22.07.2024
Dénes	owner	12	5	20.06.2024
Róbert	manager	7	8	24.07.2024
Thomas	manager	8	4	05.06.2024
Sándor	manager	8	5	10.06.2024
Krisztina	manager	11	5	12.06.2024
Emma	manager	13	7	18.06.2024

Source(s): Authors' own work, based on interviews

This market share of almost 20% is substantial enough to provide relevant information for problem identification in qualitative research. It has been argued that 6–8 interviews can be sufficient for an homogenous sample (Kuzel, 1992).

The interviews lasted between one and one and a half hours and took place in different locations, adapted to the needs of the interviewees. Prior to conducting the interviews, the interviewees were informed about the purpose of the research and how the data would be used. To protect the privacy of the participants, the interviewees are referred to in the study by their coded names. The interviews were audio-recorded with the interviewees' knowledge and consent, and transcribed verbatim. Thematic coding was used to process the information. The interview transcripts were coded with a focus on the defining periods of enterprise operation. In this regard, the characteristics of the start-up period of the enterprises were coded, as well as the operational framework of the development period, the operational characteristics of the pandemic period, and the defining characteristics of the post-pandemic period. To ensure the reliability of the coding process, at least two individuals coded all interviews.

Results and discussion

Features of the Budapest escape room offer

In recent years, escape rooms have become one of the most popular recreational activities on the international stage. Hungarian service providers have played a pioneering role in introducing this concept to Europe. Between 2014 and 2024, escape rooms underwent a rapid development process. While there were 99 escape rooms in Budapest in 2014, the number grew to 154 in 2016 and 181 in 2018. The impact of the pandemic on this growth is evident in the data from online platforms such as exitgames.hu and questhunter.hu, which show that in 2023, there were 224 escape rooms in Budapest.

Table 2 shows the changes that have occurred in response to the epidemic, based on the database developed during the research.

As shown in Table 2, the escape room market in Budapest has seen significant growth following the epidemic. Escape rooms are a popular tourist attraction, with a variety of locations across the city. While most of these rooms are located in the traditional tourist areas of Budapest, a growing number are also located in the less touristy suburbs. Furthermore, there has been an increase in the number of games available in foreign languages. While instructions are primarily provided in English, some rooms also offer descriptions in German and Italian. Information regarding escape rooms is usually available in multiple languages on their websites. During the pandemic period, most of the escape rooms were obliged to close. However, a number of these subsequently reopened by expanding their range of services to

Table 2. The characteristics of the escape rooms market in Budapest

Escape room businesses	2018	2023
Number of businesses	78	53
Number of escape rooms	181	224
Average number of escape rooms per venue	2.7	4.2
Largest venue (number of escape rooms/venue)	10	13
Price (HUF/person/game)	2,000–4,500	3,500–6,500
Timeframe of a game (minutes)	60–90	15–120
Number of players/game	2–6	2–18
Percentage of escape rooms located in the historic city centre (%)	79.0	74.0
Percentage of escape rooms located in the outskirts (%)	21.0	26.0
Percentage of businesses providing distinctive games (%)	7.7	22.0
Percentage of escape rooms that can be played in English (%)	72.0	81.0
Percentage of escape rooms that can be played in another foreign language (German, Italian) (%)	4.0	8.0
Percentage of businesses providing complementary services (%)	52.0	79.0
Percentage of businesses that request feedback from their guests (%)	23.0	61.0

Sources(s): Authors' own work, based on www.exitgames.hu (2018, 2023), <https://questhunter.hu/all-escape-rooms-of-budapest/> (2023)

include team building, business events, catering, shop-corner, and web shop services. This transition is evidenced by the increasing prevalence of businesses offering supplementary services. Examples of special services offered on a single site include a private cigar room, a drinks bar, an escape room design camp for kids or a pet-friendly service.

The number of businesses has decreased significantly compared to pre-pandemic figures, with 53 out of 78 companies remaining in the market. However, by 2023, compared to 2018, the supply had expanded in such a way that the average number of escape rooms in a venue had increased from 2.7 to 4.2 (questhunter.hu; [exitgames.hu](http://www.exitgames.hu), 2023). This change indicates a market reorganisation and a concentration of the market. This is further evidenced by the fact that the largest businesses operate between 7 and 12 different escape rooms (9 service providers) and that the number of businesses with only one escape room has decreased significantly (7 service providers). There has been a notable increase in the cost of escape rooms, with prices rising from 2,000–4,500 HUF per person to 3,500–6,500 HUF per person.

The number of places with a distinctive offer has increased over the period under review, which may further cater to the needs of tourists with special interests. The following specialisations have been identified by 2024: (1) businesses offering only outdoor mysteries, (2) businesses offering only games with VR devices, (3) businesses offering only children's escape rooms, (4) businesses offering only age-restricted escape rooms, (5) businesses offering only escape rooms for teams to compete against each other and finally (6) businesses offering only night games.

A key development is the growing emphasis on enhancing service quality and soliciting guest feedback by businesses. This commitment to quality enhancement is further evidenced by the expansion of gaming options at these establishments, along with the growing number of businesses offering supplementary services.

Analysis of findings

Eight expert interviews were conducted in June and July 2024. Three of the interviewees were business owners, and five were responsible for running the escape room services. As a preliminary step, we divided the service providers into two groups based on their business activities. The first group comprised businesses where the escape room constituted the core product (5), while the second group included businesses where the escape room was a supplementary feature to an existing product (3).

Adaptation through innovations

It is evident from the interviews that businesses have adapted to the situation created by the pandemic by initiating improvements of varying scope and focus.

Those providers offering escape rooms as their primary product demonstrated a commitment to expansion and enhancement during this period, evidenced by an augmentation in their product offerings and improvements to their infrastructure: “I created the first digital escape room in Hungary ... Here is a small free programme option, which brightens up the day of families stuck at home for a few hours” (Dénes). “... we created this webcam game. Teams can watch it from home. I am locked in a room and they decide what I do and how I do it” (Sándor). “We’ve escaped ahead ... we’ve installed the latest air technology ... but we haven’t achieved relief with the super air filter” (relief from the epidemic period restrictions on operations) (Róbert).

Businesses that offer escape rooms as a complementary product have focused on maintaining their business during the pandemic period, similar to those in the previous group. To this end, they have devised emergency solutions, with some of these solutions being based on the escape rooms: “We were in such a bad situation; we were so lost that we thought we had to generate some income. On each route there were six locations where we had to solve a puzzle. These routes could be walked along” (Imola) (They took the scavenger hunt programme out into urban spaces and green areas.) “Rapid improvements so we don’t go anywhere, no risk of infection” (Emma) “We didn’t think we would get to the point where we would have to specifically close. When we did, we started brainstorming” (Tamás).

No prior crisis management plans

None of the companies interviewed had a crisis management plan. However, this was not a major surprise, as the vast majority of businesses and firms in Hungary had not formulated such plans before the epidemic, as there had never been a crisis like this before. However, it is imperative to derive valuable lessons from the crisis period to ensure the swift implementation of necessary measures in a future, similar situation. One of the key factors highlighted by our interviewees was the necessity for sufficient working capital. “We used up our reserves, so we didn’t have to take out a loan” (Imola). “We were positive, so we tried to get everything we needed at the beginning, even second-hand and so on” (Dénes).

Influential role of geographical location

In terms of geographical location, six of the businesses surveyed have their escape rooms in the historic city centre, which is the area most sought after by tourists. Two of the interviewees had their escape rooms in the suburbs. However, foreign tourists are more attracted to escape rooms that are located close to local tourist attractions (Vilar Lama and Garcia Martin, 2021).

“Initially, tourists accounted for 15–18% of the total number of guests, which was about one group, a busload of groups. Mostly European. In Europe at that time, it was a one-off thing (the escape room). Today it is 0%. Now it is no longer the case that if they come to Hungary, they have to go to the escape room” (Miklós). “Foreigners are put off by the fact that we are not in the city centre. Hungarian families are our guests” (Dénes).

Resilience through social responsibility

It should be noted, however, that all of these companies have sought ways to retain staff despite the challenging circumstances. A distinctive feature of their operations is the utilisation of external personnel, frequently student workers, for roles such as game moderators. These contract workers were the first to be replaced, and so were more likely to retain their internal staff. “In the first wave we kept the employees. They painted the walls, renovated the counter, made repairs and improvements” (Róbert). “We survived by obviously letting everyone (external contract workers) go. Which was easier, on the one hand, because we didn’t have to

send people from the staff” (Imola). “In my case, the moderators were typically student workers. There are two or three permanent paid staff, the rest are student workers” (Krisztina).

Growing importance of additional services

The following characteristics were identified among the guests who participated in the escape rooms that were analysed. All escape rooms experience a higher proportion of domestic guests. Of the businesses analysed, one has a share of foreign guests of up to 40%, while the others have a much lower or very low share. Among domestic guests, four segments stand out: 1) families with young children, 2) young people, 3) corporate guests, 4) special interest guests. “Mostly families with children come to play. There are many returning guests, young people on school trips” (Sándor). “Young people, students and many foreigners. 60% Hungarians, 40% foreigners” (Róbert). “Some companies return regularly. There are also escape room fanatics, but not the norm. School groups also come, especially around school closures. Young people in their thirties, groups of friends and families” (Miklós). “In the beginning, it was mainly small Hungarian businesses that came to us . . . and today it’s very much multi-national. The guests are domestic, mainly from Pest County” (Emma). Special interest tourists in the analysed businesses include bachelorette party guests and young people visiting the party district. “We have a good number of hen parties” (Tamás). “. . . we had a buzz in the escape room, and that attracts a kind of layer. Young people came to have fun with us . . . We put a lot of effort into the exterior, party area, stop signs, neon signs . . . once the guest is in, it shouldn’t be so much about coming in, paying, having fun, going out, but keep them in before and after” (Róbert).

Increasing demand for service quality

The research findings also demonstrated that the quality of the service offered and the unique experience provided to guests were key factors in the success of the businesses analysed. “We wanted it to be affordable and we wanted an exclusive venue . . . and we wanted our guests to get in the flow. It gets people excited in a way that you don’t normally get on a weekday, that’s good, and the collaboration is good. It’s a huge advantage to be able to make everything unique and tailored to the customer’s needs” (Imola). “The main line that we have been able to attract the guests with the most is the theme and the quality of the escape room” (Róbert).

It is interesting to note that, although the quality of service is important for businesses, only one of the interviewed companies collects and analyses data on the characteristics of their guests. The remaining companies rely on their own observations to inform improvements.

Conclusion and recommendations

The present study investigated the impact of the COVID pandemic on tourism service providers through the use of escape room businesses in Budapest. The results of our study are most useful in exploring the practical consequences of the unprecedented crisis that has occurred over several years. It could also be useful in developing strategies for existing and future crises (e.g. economic).

It was clear from the interviews that these businesses were able to adapt to an extreme operating environment and that they had innovated to improve their adaptability. The adaptation strategies presented, such as the introduction of digital innovations, the development of venues, the diversity of thematic offerings or the expansion of complementary services, can provide useful lessons not only for businesses in Budapest but also for those in other international markets.

It is particularly important to us that social responsibility is reflected in the activities of escape room businesses, which made serious efforts to retain staff. This approach is also noteworthy in an international context as an example of good practice.

However, the research also yielded a practical benefit in that it has identified gaps. One such gap is that most of the businesses surveyed (seven out of eight) do not collect and analyse guest data. They therefore use their intuition and experience for planning and development, which can lead to errors. An example that is relevant and informative is the cancellation of an “escape room designer” summer camp due to a lack of enrolment. This was because of a lack of understanding of the target segment’s characteristics.

These practical experiences and adaptation models can serve as a valuable source of inspiration for other niche tourism businesses worldwide, including those tailored to meet the needs of special interest tourists. The results of this research could help them to become more flexible and future-oriented.

A limitation of our research and the interpretation of the results is that only one city, Budapest, was used as a case study. It should be noted that the current data set, which is based on eight interviews, only provides a partial overview of the escape room market in Budapest. Further research is needed to refine the results. Budapest has played a significant role in the expansion of escape rooms, with escape rooms reaching several major European cities through Hungarian mediation. As a result, the city had a head start over its competitors. In the continuation of our research, we will examine the international competitiveness of Budapest’s escape rooms and the survival strategies of other countries’ operators. In addition, we are planning to investigate the potential for enhancing the appeal of Budapest’s escape rooms to special interest tourists.

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Corresponding author

Csilla Petyko can be contacted at: petyko.csilla@uni-bge.hu