

THINK HUNGARY, MORE THAN EXPECTED



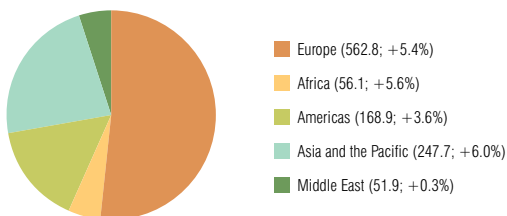
TOURISM IN HUNGARY 2013



WITH PRELIMINARY DATA

Tourism in Hungary

International Tourist Arrivals in the World (million, 2013/2012)



Source: UNWTO

Facts & Figures about Hungary

Territory	93,030 km ²
Population	9,908,798 (1 January 2013)
Population density	107.0 km ²
Capital	Budapest
Capital's population	1,735,711 (1 January 2013)
Neighbouring countries	Austria, Slovakia, Ukraine, Romania, Serbia, Croatia, Slovenia
Form of government	Republic
Official language	Hungarian
Religion	37.1% Roman Catholic, 11.6% Calvinist, 2.2% Lutheran, 1.8% Greek Catholic, 0.4% other Christian, 1.9% other denomination, 18.2% unaffiliated
Holidays	1 January, 15 March, Easter Monday, Whit Monday, 1 May, 20 August, 23 October, 1 November, 25–26 December
Time zone	GMT + 1 hour
Currency	Forint (HUF), 1 EUR = 279.21 HUF
GDP 2012*	12,455 million USD (28,048 billion HUF)
GDP 2012/2011* (in HUF)	+1.5%
GDP per capita 2012*	12,546 USD (2,827 thousand HUF)
Internet penetration	65.4%
International airports	Budapest, Debrecen, Sármellék
Membership in international tourism organisations	World Tourism Organization (UNWTO), European Travel Commission (ETC), Visegrád Four (V4), Danube Competence Center (DCC)

* Preliminary data.

Sources: Internet World Stats, HCSO

The Economic Impact of Tourism in Hungary*

	GDP		Employment	
	billion HUF	%	000s	%
2007	1,322	5.9	323	8.4

* Direct impact of tourism.

Source: HCSO

Main Data on Hungarian Tourism			
	2012	2013	2013/2012
Number of visitors*			
Inbound (000s)	33,717	33,816	+0.3%
Outgoing (000s)	12,316	12,158	-1.3%
Arrivals and Guest Nights at Commercial Accommodation*			
Domestic			
Arrivals (000s)	4,222	4,452	+5.5%
Guest nights (000s)	10,413	10,879	+4.5%
Average length of stay (nights)	2.5	2.4	-0.9%
International			
Arrivals (000s)	4,164	4,378	+5.1%
Guest nights (000s)	11,392	11,920	+4.6%
Average length of stay (nights)	2.7	2.7	-0.5%
Total			
Arrivals (000s)	8,385	8,830	+5.3%
Guest nights (000s)	21,805	22,799	+4.6%
Average length of stay (nights)	2.6	2.6	-0.7%
from which: in Hotels			
Domestic			
Arrivals (000s)	2,895	3,111	+7.4%
Guest nights (000s)	7,042	7,492	+6.4%
Average length of stay (nights)	2.4	2.4	-1.0%
International			
Arrivals (000s)	3,689	3,869	+4.9%
Guest nights (000s)	9,582	10,015	+4.5%
Average length of stay (nights)	2.6	2.6	-0.4%
Total			
Arrivals (000s)	6,584	6,980	+6.0%
Guest nights (000s)	16,624	17,058	+5.3%
Average length of stay (nights)	2.5	2.5	-0.7%
Commercial Accommodation Gross Revenues			
Domestic accomm. fee (million HUF)	55,162	60,501	+9.7%
International accomm. fee (million HUF)	96,927	105,873	+9.2%
Food & beverage (million HUF)	61,217	66,051	+7.9%
Other revenue (million HUF)	57,466	65,066	+13.2%
Total (million HUF)	270,772	297,491	+9.9%
Balance of Travel*			
Receipts (million EUR)	2,935	2,993	+2.0%
Expenditure (million EUR)	1,221	1,148	-6.0%
Balance (million EUR)	1,714	1,845	+7.7%

* January–September.

Sources: HCSO preliminary data, MNB

Guest Nights by Type of Accommodation

	2012	2013	2013 share	2013/2012
Hotels	16,624,260	17,507,836	76.8%	+5.3%
5 star hotels	1,619,419	849,143	3.7%	n.a.
4 star hotels	8,502,561	6,433,871	28.2%	n.a.
3 star hotels	5,295,114	2,750,510	12.1%	n.a.
Spa hotels	1,828,468	1,876,407	8.2%	+2.6%
Boarding houses	1,373,650	1,379,553	6.1%	+0.4%
Community hostels	1,219,631	1,291,494	5.7%	+5.9%
Bungalows	1,009,926	1,032,802	4.5%	+2.3%
Camping sites	1,577,733	1,587,264	7.0%	+0.6%
Total	21,805,200	22,798,949	100.0%	+4.6%

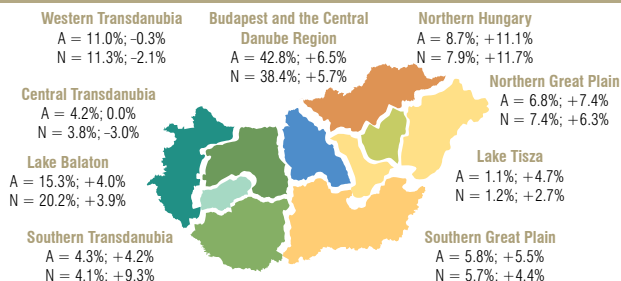
From July 2012 the HCSO publishes data only of those operating spa hotels that are registered by the Department of Public Health, the Office of the Chief Medical Officer.

The data for three and four star hotels, hotels without category and wellness hotels are not published by HCSO since 2013.

Source: HCSO preliminary data

The change in the number of guest nights at the hotels (+5.3%) was above the country average.

Arrivals and Guest Nights by Tourist Region (2013; 2013/2012)

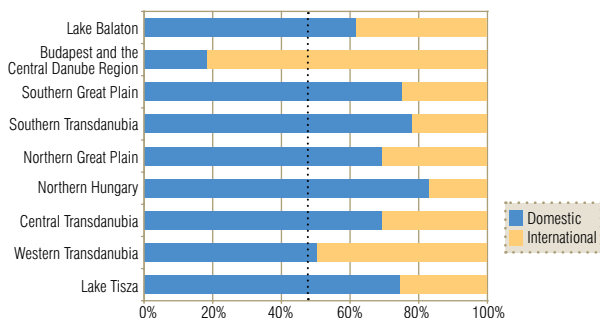


A = Arrivals, N = Guest nights.

Source: HCSO preliminary data

Geographical concentration is typical of Hungarian tourism: 70.0% of total guest nights is registered in the Budapest and the Central Danube, the Lake Balaton and the Western Transdanubia tourist regions.

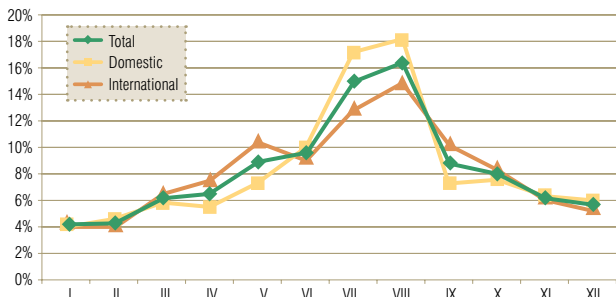
Share of Domestic and International Guest Nights by Tourist Region (% at Commercial Accommodation)



Country average: domestic: 47.7%, international: 52.3%.

Source: HCSO preliminary data

Monthly Breakdown of Guest Nights at Commercial Accommodation



Source: HCSO preliminary data

Seasonality is typical of Hungarian tourism: most of the guest nights were generated in July and August (15.0% and 16.4%, respectively).

Number of Guest Nights by Tourist Region

	Domestic	International	Total
Lake Balaton	2,831,210	1,772,464	4,603,674
Budapest and the Central Danube Region	1,600,287	7,165,773	8,766,060
Southern Great Plain	966,558	325,152	1,291,710
Southern Transdanubia	730,091	209,566	939,657
Northern Great Plain	1,156,673	519,849	1,676,522
Northern Hungary	1,490,447	306,682	1,797,129
Central Transdanubia	603,621	269,624	873,245
Western Transdanubia	1,303,559	1,283,450	2,587,009
Lake Tisza	196,448	67,495	263,943
Total	10,878,894	11,920,055	22,798,949

Source: HCSO preliminary data

More than half (60.1%) of international guest nights are registered in the Budapest and the Central Danube Region, 14.9% are registered in the Lake Balaton tourist region.

Most Visited Hungarian Cities*

	Domestic	International	Total
1. Budapest (901)	Budapest (6,910)	Budapest (7,810)	
2. Hajdúszoboszló (481)	Hévíz (714)	Hévíz (1,043)	
3. Siófok (468)	Bük (381)	Hajdúszoboszló (740)	
4. Hévíz (329)	Sárvár (275)	Siófok (670)	
5. Zalakaros (307)	Hajdúszoboszló (258)	Bük (656)	
6. Gyula (283)	Balatonfüred (232)	Balatonfüred (503)	
7. Bük (275)	Siófok (202)	Sárvár (456)	
8. Balatonfüred (272)	Győr (192)	Zalakaros (413)	
9. Sopron (264)	Eger (109)	Sopron (358)	
10. Eger (235)	Zalakaros (106)	Eger (343)	

* () Number of guest nights at commercial accommodation units (000s).

Source: HCSO preliminary data

The spas and the Lake Balaton are also popular destinations after Budapest among the visitors.

Domestic Guest Nights by Type of Accommodation

	2012	2013	2013 (share)	2013/2012
Hotels	7,041,817	7,492,396	68.9%	+6.4%
5 star hotels	172,877	94,504	0.9%	n.a.
4 star hotels	3,300,691	2,495,922	22.9%	n.a.
3 star hotels	2,755,889	1,274,128	11.7%	n.a.
Spa hotels	783,429	801,037	7.4%	+2.2%
Boarding houses	1,017,825	1,029,025	9.5%	+1.1%
Community hostels	1,013,589	987,936	9.1%	-2.5%
Bungalows	818,351	810,558	7.5%	-1.0%
Camping sites	521,435	558,979	5.1%	+7.2%
Total	10,413,017	10,878,894	100.0%	+4.5%

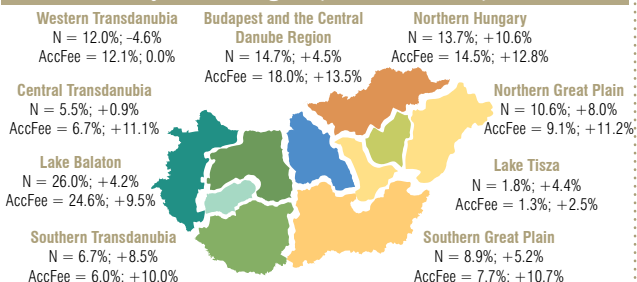
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The data for three and four star hotels, hotels without category and wellness hotels are not published by HCSO since 2013.

Source: HCSO preliminary data

The change in the number of the domestic guest nights at the hotels (+6.4%) was above the average.

Domestic Guest Nights and Accommodation Fee by Tourist Region (2013; 2013/2012)

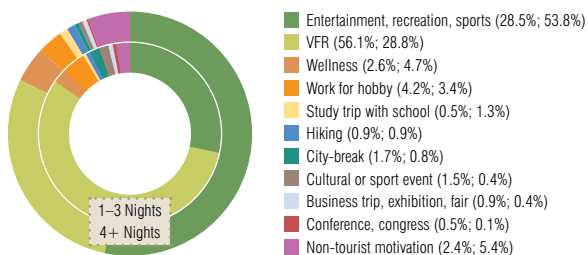


N = Guest nights, AccFee = Accommodation Fee.

Source: HCSO preliminary data

Geographical concentration is less typical for domestic tourism: 54.4% of domestic guest nights were registered in the Lake Balaton, the Budapest and the Central Danube and the Northern Hungary tourist regions.

Motivation of Domestic Travellers (1-3 Nights; 4+ Nights)



Total tourist motivation: 97.6% and 94.6%, respectively.

Source: HCSO (2012)

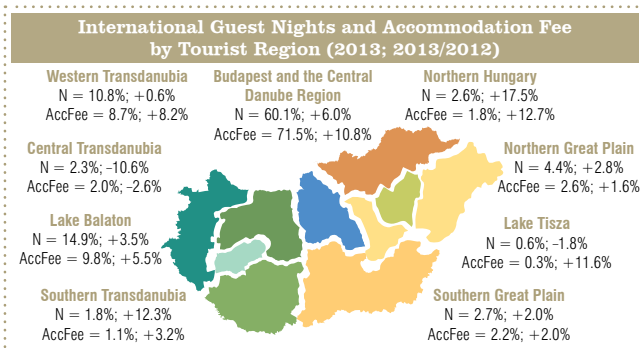
International Guest Nights by Type of Accommodation				
	2012	2013	2013 (share)	2013/2012
Hotels	9,582,443	10,015,440	84.0%	+4.5%
5 star hotels	1,446,542	754,639	6.3%	n.a.
4 star hotels	5,201,870	3,937,949	33.0%	n.a.
3 star hotels	2,539,225	1,476,382	12.4%	n.a.
Spa hotels	1,045,039	1,075,370	9.0%	+2.9%
Boarding houses	355,825	350,528	2.9%	-1.5%
Community hostels	206,042	303,558	2.5%	+47.3%
Bungalows	191,575	222,244	1.9%	+16.0%
Camping sites	1,056,298	1,028,285	8.6%	-2.7%
Total	11,392,183	11,920,055	100.0%	+4.6%

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Source: HCSO preliminary data

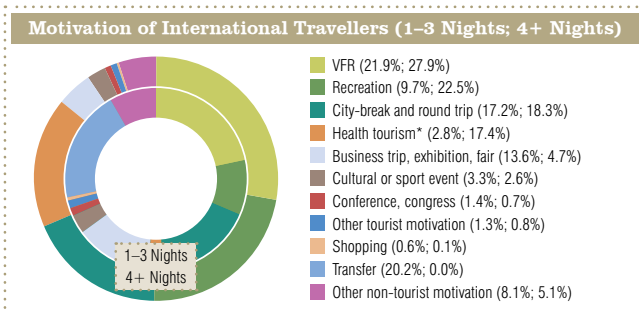
The change in the number of international guest nights at community hostels (+47.3%) was above average.



N = Guest nights, AccFee = Accommodation Fee.

Source: HCSO preliminary data

Hungarian inbound tourism is geographically strongly concentrated: 85.8% of the foreign guest nights were registered in the Lake Balaton, the Budapest and the Central Danube and the Western Transdanubia tourist regions.



*Including medical treatment, wellness, dental tourism, plastic and other operation.

Source: HCSO (2012)

Total tourist motivation: 71.2% and 94.9%, respectively. Total non-tourist motivation: 28.9% and 5.2%, respectively.

Arrivals and Guest Nights at Commercial Accommodation				
	Arrivals		Guest Nights	
	2013	2013/2012	2013	2013/2012
Austria	286,698	-3.5%	758,548	-5.7%
Belgium	72,923	+2.3%	220,849	+5.2%
Croatia	37,313	+3.6%	73,254	-0.1%
the Czech Republic	199,078	+6.2%	571,372	+6.1%
Denmark	43,811	+9.2%	168,460	+5.5%
Estonia	6,878	+24.0%	15,358	+27.2%
Finland	52,138	+19.7%	156,935	+16.0%
France	147,823	+2.1%	38,7669	+1.8%
Germany	553,823	-2.9%	2,044,652	-4.7%
Greece	35,607	+3.3%	95,802	+2.8%
Ireland	18,465	-8.4%	49,905	-11.3%
Italy	232,599	+1.6%	627,495	+0.5%
Latvia	7,817	+3.4%	16,172	+15.7%
Lithuania	9,640	+20.5%	19,024	+26.7%
Luxembourg	3,338	-22.9%	8,579	-3.0%
the Netherlands	131,762	-1.3%	463,567	+0.9%
Norway	50,466	+12.4%	158,176	+10.2%
Poland	214,434	+10.5%	541,301	+11.6%
Portugal	16,859	+14.6%	39,894	+9.2%
Romania	213,544	-1.9%	410,387	-2.1%
Russia	193,800	+21.9%	756,145	+23.1%
Serbia	64,811	+4.1%	129,652	+5.6%
Slovakia	129,197	+7.8%	285,476	+6.9%
Slovenia	27,156	-0.1%	53,375	-13.1%
Spain	129,146	-10.1%	320,638	-12.3%
Sweden	88,161	+5.0%	255,683	+4.8%
Switzerland	65,991	+12.2%	190,373	+8.3%
Turkey	56,615	+12.0%	120,898	+13.0%
Ukraine	139,537	+0.6%	264,325	+10.0%
United Kingdom	267,928	+10.9%	674,765	+11.0%
Europe	3,626,742	+3.1%	10,141,485	+2.7%
from which: EU-27	2,930,718	+1.8%	8,265,908	+0.6%
Asia	389,127	+12.0%	861,242	+16.6%
from which: China	75,603	+4.9%	139,468	+9.0%
India	10,907	+4.9%	28,059	-0.8%
Israel	65,101	+27.7%	226,941	+28.3%
Japan	77,523	+0.6%	163,020	+6.2%
Republic of Korea	67,491	+23.7%	98,986	+38.9%
Africa	17,430	+20.1%	50,229	+25.3%
America	306,039	+20.1%	768,713	+16.7%
from which: Brazil	30,741	+28.9%	77,453	+15.2%
Canada	31,340	+25.4%	85,092	+23.3%
USA	207,042	+17.8%	512,178	+13.7%
Australia and the Pacific	38,454	+25.5%	98,386	+29.2%
Total	4,377,792	+5.1%	11,920,055	+4.6%

Source: HCSO preliminary data

Arrivals and Guest Nights at Hotels				
	Arrivals		Guest Nights	
	2013	2013/2012	2013	2013/2012
Austria	244,817	-2.5%	612,206	-4.0%
Belgium	62,097	+1.9%	175,549	+4.6%
Croatia	34,298	+4.2%	63,930	-1.8%
the Czech Republic	167,057	+8.5%	471,249	+8.3%
Denmark	35,916	+15.3%	111,046	+10.5%
Estonia	5,795	+33.7%	12,649	+28.5%
Finland	48,755	+20.7%	146,955	+16.7%
France	132,709	+1.9%	343,012	+1.5%
Germany	465,109	-3.0%	1,517,246	-5.5%
Greece	34,635	+3.5%	93,037	+3.3%
Ireland	16,586	-12.8%	43,956	-16.7%
Italy	215,367	+1.8%	580,902	+0.4%
Latvia	6,873	-0.8%	13,753	+11.2%
Lithuania	7,822	+24.1%	15,140	+23.8%
Luxembourg	3,067	-23.7%	7,661	-1.5%
the Netherlands	90,480	-4.6%	231,994	-5.5%
Norway	48,802	+12.7%	153,110	+10.8%
Poland	148,507	+8.2%	341,708	+10.6%
Portugal	15,609	+13.8%	36,734	+7.8%
Romania	181,648	-1.5%	333,249	-1.4%
Russia	188,258	+22.4%	737,806	+24.3%
Serbia	59,075	+2.4%	116,762	+3.1%
Slovakia	98,255	+10.0%	214,792	+9.6%
Slovenia	22,707	-0.2%	42,959	-16.0%
Spain	123,472	-10.6%	304,884	-13.4%
Sweden	84,113	+5.0%	242,903	+5.0%
Switzerland	59,094	+11.7%	167,117	+9.7%
Turkey	54,310	+11.2%	112,701	+10.1%
Ukraine	130,762	+0.6%	245,051	+11.4%
United Kingdom	254,224	+10.5%	634,446	+10.4%
Europe	3,162,456	+3.2%	8,366,301	+2.8%
from which: EU-27	2,503,104	+1.8%	6,595,423	+0.3%
Asia	374,552	+10.4%	812,781	+13.6%
from which: China	73,632	+4.7%	133,670	+9.0%
India	10,296	+3.1%	26,293	-3.9%
Israel	63,947	+27.0%	223,924	+27.7%
Japan	75,820	+0.2%	155,477	+4.4%
Republic of Korea	62,237	+16.7%	81,817	+19.4%
Africa	16,298	+17.9%	45,844	+21.9%
America	283,179	+16.3%	707,046	+12.9%
from which: Brazil	25,184	+14.1%	63,617	+2.2%
Canada	28,497	+21.3%	77,286	+19.7%
USA	198,205	+16.2%	488,201	+12.8%
Australia and the Pacific	32,580	+18.8%	83,468	+22.8%
Total	3,869,065	+4.9%	10,015,440	+4.5%

Source: HCSO preliminary data

Commercial Accommodation Capacity				
	Units	Rooms	Beds	2013/2012 (beds)
Hotels	1,024	59,409	142,455	+2.7%
5 star hotels	10	2,243	4,576	-50.5%
4 star hotels	167	17,132	39,692	-28.1%
3 star hotels	149	9,055	21,809	-58.4%
Spa hotels	30	4,557	10,266	-0.9%
Boarding houses	1,019	11,521	30,628	-3.9%
Community hostels	360	12,741	45,895	-2.7%
Bungalows	393	7,533	24,944	-8.0%
Camping sites	257	31,220	81,640	-10.8%
Total	3,053	122,424	325,562	-3.2%

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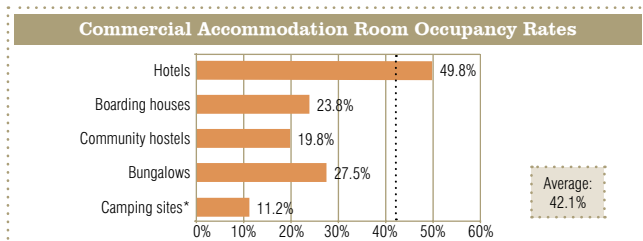
Source: HCSO preliminary data (31 July 2013)

Commercial Accommodation Gross Revenues				
	Accommodation	Food & Beverage	Other (incl. breakfast)	Total
million HUF				
Hotels	148,939	55,820	63,332	268,091
5 star hotels	16,638	7,432	4,689	28,759
4 star hotels	54,255	20,469	29,507	104,231
3 star hotels	15,555	5,158	7,758	28,470
Spa hotels	14,386	4,895	12,132	31,414
Boarding houses	7,339	8,992	906	17,237
Community hostels	3,491	471	259	4,222
Bungalows	3,410	624	296	4,331
Camping sites	3,195	143	272	3,611
Total	166,375	66,051	65,066	297,491

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The data for three and four star hotels, hotels without category and wellness hotels are not published by HCSO since 2013 January.

Source: HCSO preliminary data



* Occupancy rate of tent places

Source: HCSO preliminary data

Budapest				
	Commercial Accommodation		Hotels	
	2013	2013/2012	2013	2013/2012
Domestic				
Arrivals (000s)	424	+6.3%	371	+8.8%
Guest nights (000s)	901	+1.2%	797	+7.9%
Average length of stay (nights)	2.1	-4.8%	2.1	-0.8%
International				
Arrivals (000s)	2,863	+6.4%	2,735	+5.6%
Guest nights (000s)	6,910	+5.9%	6,547	+5.1%
Average length of stay (nights)	2.4	-0.4%	2.4	-0.5%
Total				
Arrivals (000s)	3,288	+6.4%	3,106	+5.9%
Guest nights (000s)	7,810	+5.4%	7,343	+5.4%
Average length of stay (nights)	2.4	-0.9%	2.4	-0.5%

Source: HCSO preliminary data

26.5% of commercial accommodation bed places are located in **Budapest**. The capital receives 37.2% of the arrivals and 34.3% of the guest nights at commercial accommodation. Regarding domestic tourism, this means a share of 9.5% of arrivals, and a share of 8.3% of guest nights. The international importance of the capital is highlighted by the fact that Budapest has a share of 65.3% of international arrivals, and a share of 58.0% of international guest nights. Due to the popularity of city breaks and business trips, the average length of stay is below the country average.

Lake Balaton				
	Commercial Accommodation		Hotels	
	2013	2013/2012	2013	2013/2012
Domestic				
Arrivals (000s)	999	+4.8%	707	+7.1%
Guest nights (000s)	2,831	+4.2%	1,983	+6.8%
Average length of stay (nights)	2.8	-0.6%	2.8	-0.2%
International				
Arrivals (000s)	355	+2.0%	245	+0.5%
Guest nights (000s)	1,772	+3.5%	1,226	+2.9%
Average length of stay (nights)	5.0	+1.5%	5.0	+2.4%
Total				
Arrivals (000s)	1,354	+4.0%	952	+5.3%
Guest nights (000s)	4,604	+3.9%	3,209	+5.3%
Average length of stay (nights)	3.4	-0.1%	3.4	0.0%

Source: HCSO preliminary data

25.1% of commercial accommodation bed places are located in **Lake Balaton** tourist region. 15.3% of all guests spend 20.2% of guest nights at the lake. Regarding domestic tourism, this means a share of 22.4% of arrivals, and a share of 26.0% of guest nights. Lake Balaton is also popular among international visitors: the lake and its surroundings have a share of 8.1% of international arrivals, and a share of 14.9% of international guest nights. Thanks to the popularity of waterbased tourism, the average length of stay is above the country average.

Spa Hotels			
	2012	2013	2013/2012
Domestic			
Arrivals (000s)	264	275	+3.8%
Guest nights (000s)	783	801	+2.2%
Average length of stay (nights)	3,0	2,9	-1.8%
International			
Arrivals (000s)	236	231	-2.2%
Guest nights (000s)	1,045	1,075	+2.9%
Average length of stay (nights)	4.4	4.7	+5.1%
Total			
Arrivals (000s)	501	506	+0.9%
Guest nights (000s)	1,828	1,876	+2.6%
Average length of stay (nights)	3.7	3.7	+1.6%

From July 2012 the HCSO publishes data only of those operating spa hotels that are registered by the Department of Public Health, the Office of the Chief Medical Officer.

The data for wellness hotels are not published by HCSO since 2013.

Source: HCSO preliminary data

Spa hotels has a share of 5.8% of bed places offered by the commercial accommodation establishments. 5.7% of guests arrive at these facilities which means a share of 8.2% of guest nights. 6.2% of domestic arrivals and 7.4% of guest nights are registered in the spa hotels. Health tourism is an important motivation also for international travellers: spa hotels receive 5.3% of arrivals and 9.0% of guest nights. In spa hotels, 42.6% of the guest nights are generated by domestic travellers. The average length of stay at spa hotels is above the commercial accommodation average.

Conferences in Hungary				
	Number		Share (%)	
	International	Hungarian	International	Hungarian
Corporate	580	944	57.0%	70.2%
Associations	378	321	37.2%	23.9%
Other	59	80	5.8%	5.9%
Total	1,017	1,345	100.0%	100.0%

Source: Hungarian Tourism Plc. – Hungarian Convention Bureau

Main Characteristics of International Conferences in Hungary	
Number of conferences	1,017
Average number of participants	234
Average length of stay	3.4 day
Geographical breakdown	69.9% Budapest, 30.1% countryside
Venues	Budapest, Balaton and surroundings, Pécs, Szeged, Debrecen, Eger
The most important themes	medical science, economics, other sciences, information technology, pharmacy
Nationality of meeting planners	66.8 % Hungarian, 4.7 % British, 4.5 % German, 4.4% American
Participating nations	65.6 % Hungarian, 45.4 % German, 42.6 % American, 38.5 % Polish, 36.5 % Czech

International conferences: corporate or association meetings with at least 50 participants that include foreigners.

Source: Hungarian Tourism Plc. – Hungarian Convention Bureau

Main Data on Travelling Habits (2008, 2012)

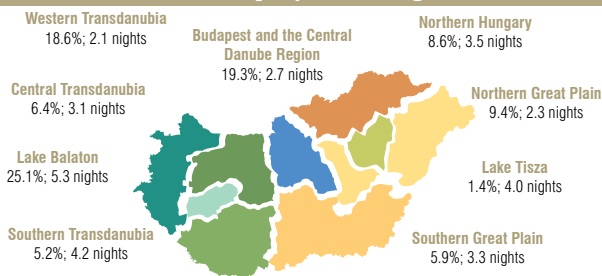
	2008	2012
Share of travellers taking a day trip	63%	73%
<i>from which: only domestic</i>	87%	84%
<i>only abroad</i>	1%	1%
<i>domestic and abroad</i>	12%	15%
Share of travellers taking an overnight trip	58%	63%
<i>from which: only domestic</i>	58%	61%
<i>only abroad</i>	17%	14%
<i>domestic and abroad</i>	25%	25%
Main domestic destinations of overnight trips	Lake Balaton, Northern Hungary, BCDR	Lake Balaton, BCDR, Western Transdanubia
Average length of domestic overnight trips	3.4 nights	3.4 nights
Cost of domestic overnight trips/person/day	4,801 HUF	3,928 HUF
Destinations of main domestic holiday	Lake Balaton, Northern Hungary, BCDR	Lake Balaton, Northern Great Plane, BCDR
Average length of main domestic holiday	5.0 nights	5.2 nights
Cost of main domestic holiday/person/day	5,264 HUF	5,288 HUF

BCDR = Budapest and the Central Danube Region.

Source: Hungarian Tourism Plc.

In 2012 we examined that in what proportion can daytrips be considered as part of the everyday life (e.g. regular sport, shopping in another city or settlement). 29.5% of the domestic daytrips do not belong to the regular life routines of the travellers, and the main motivations are: VFR, shopping, waterside activities, medical treatment and city-trips.

Domestic trips by Tourist Region



Source: Hungarian Tourism Plc. (2012)

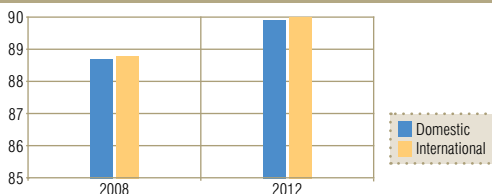
The most popular foreign destinations of overnight trips: Austria (15.4%), Romania (13.9%), Italy (10.8%).

Day trip = a one-day trip without an overnight stay, when a member of the household spends less than a day in another settlement, and his/her purpose is not to work or to study.

Overnight trip = a trip when a member of the household spends at least one night away from his/her place of residence, his/her purpose is not to work or to study, and the period spent away from home does not exceed one year.

Main holiday = the major travel of the household in the given period which involves at least two members of the household (unless it is a single household).

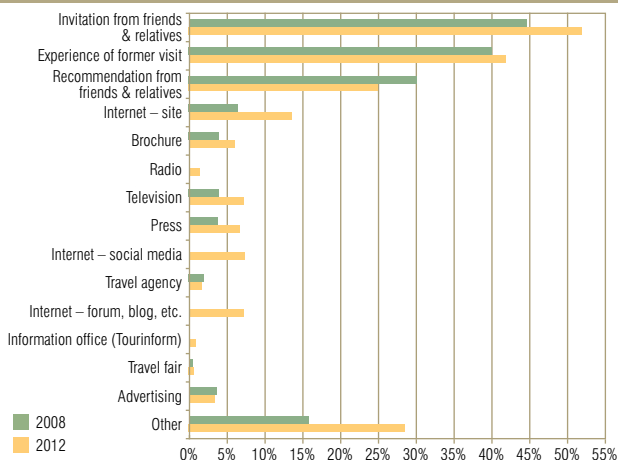
Satisfaction with the main holiday



0=not satisfied, 100=satisfied.

Source: Hungarian Tourism Plc.

Influencing Factors of Decision-making of Domestic Travellers (2008; 2012)



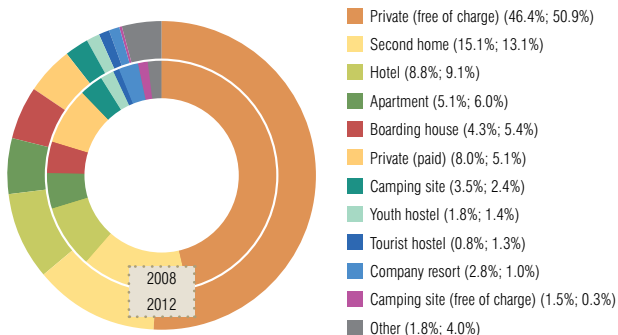
2012: among domestic travellers, 2008: among those travelling only at home. In 2012, 28.2% of domestic travellers were influenced by the Internet (2008: 14.1%). Source: Hungarian Tourism Plc.

Information Sources of Domestic Travellers

	Before trip	During trip
Internet – site	85.4%	14.3%
Information from friends & relatives	36.2%	5.9%
Brochure	16.7%	12.9%
Travel book	12.7%	6.1%
Map	15.8%	13.1%
Local people	4.5%	9.8%
Television	7.6%	–
Internet – forum	17.0%	3.1%
Information office (Tourinform)	5.1%	6.2%
Internet – social media	23.8%	3.8%
Press	5.4%	–
Travel agency	5.3%	–
Travel fair	1.3%	–
Radio	0.8%	–
Other	–	2.3%

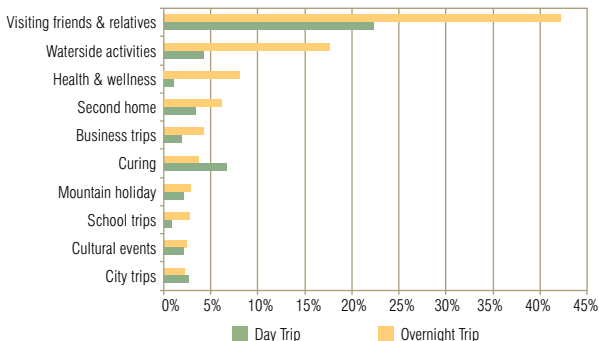
Among those who gather information. Altogether 86.8% of the Hungarian travellers used the Internet. Source: Hungarian Tourism Plc. (2012)

Accommodation Used by Domestic Travellers (2008, 2012)



Source: Hungarian Tourism Plc.

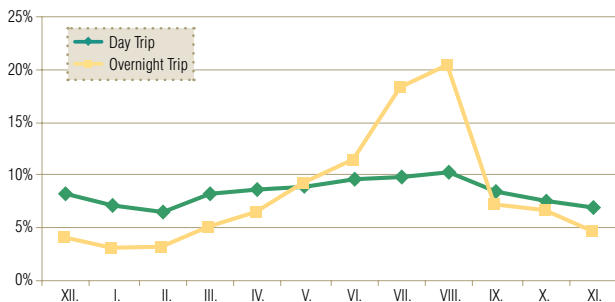
Motivation of Domestic Travellers



According to overnight trip. Motivations mentioned at least by 2% of the people.

Source: Hungarian Tourism Plc. (2012)

Seasonality of Domestic Trips (December 2011 – November 2012)



Source: Hungarian Tourism Plc.

Tourism in Hungary 2013

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Abbreviations used in the publication

HCSO: Hungarian Central Statistical Office, MNB: Magyar Nemzeti Bank (the central bank of Hungary), UNWTO: World Tourism Organization.

Terms used in the publication

Commercial Accommodation: hotels, boarding houses (previously guesthouses), bungalows, community hostels (previously tourist hostels and youth hostels) and camping sites according to the Act CLXIV of 2005 on Trade and 239/2009 (X.20) Government Decree.

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Hungarian Tourism Plc.

As the national tourism marketing organisation, main objective of the Hungarian Tourism Plc. is promoting Hungary's tourism attractions and services to increase the receipts from inbound and domestic tourism.

This publication and the summary of the marketing plan of the Hungarian Tourism Plc. can be downloaded from the travel trade pages of gotohungary.com.

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