

THINK HUNGARY, MORE THAN EXPECTED



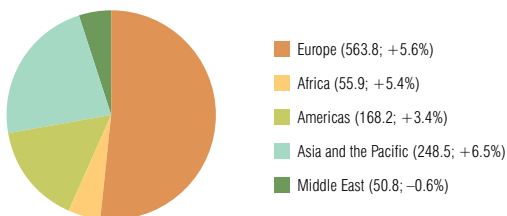
TOURISM IN HUNGARY 2013



WITH FINAL 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*	124,455 million USD (28,048 billion HUF)
GDP 2013/2012* (in HUF)	+1.1%
GDP per capita 2013*	13,156 USD (2,943 thousand HUF)
Internet penetration	65.4%
International airports	Budapest, Debrecen, Sármellék
Membership in international tourism organisations	World Tourism Organization (UNWTO), European Travel Commission (ETC), Visegrad 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)	43,565	43,665	+0.2%
Outgoing (000s)	16,143	15,997	-0.9%
Arrivals and Guest Nights at Commercial Accommodation*			
Domestic			
Arrivals (000s)	4,222 (2,895)	4,497 (3,133)	+6.5% (+8.2%)
Guest nights (000s)	10,413 (7,042)	10,986 (7,553)	+5.5% (+7.3%)
Average length of stay (nights)	2.5 (2.4)	2.4 (2.4)	-1.0% (-0.9%)
International			
Arrivals (000s)	4,164 (3,689)	4,388 (3,870)	+5.4% (+4.9%)
Guest nights (000s)	11,392 (9,582)	11,983 (10,015)	+5.2% (+4.5%)
Average length of stay (nights)	2.7 (2.6)	2.7 (2.6)	-0.2% (-0.4%)
Total			
Arrivals (000s)	8,385 (6,584)	8,885 (7,003)	+6.0% (+6.4%)
Guest nights (000s)	21,805 (16,624)	22,968 (17,568)	+5.3% (+5.7%)
Average length of stay (nights)	2.6 (2.5)	2.6 (2.5)	-0.6% (-0.6%)
Arrivals and Guest Nights at Other Accommodation			
Domestic			
Arrivals (000s)	685	728	+6.2%
Guest nights (000s)	2,181	2,339	+7.2%
Average length of stay (nights)	3.2	3.2	+0.9%
International			
Arrivals (000s)	269	335	+24.6%
Guest nights (000s)	1,187	1,333	+12.3%
Average length of stay (nights)	4.4	4.0	-9.9%
Total			
Arrivals (000s)	954	1,063	+11.4%
Guest nights (000s)	3,368	3,672	+9.0%
Average length of stay (nights)	3.5	3.5	-2.2%
Commercial Accommodation Gross Revenues			
Domestic accomm. fee (million HUF)	55,162	61,090	+10.7%
International accomm. fee (million HUF)	96,927	105,498	+8.8%
Food & beverage (million HUF)	61,217	67,066	+9.6%
Other revenue (million HUF)	57,466	65,348	+13.7%
Total (million HUF)	270,772	299,003	+10.4%
Balance of Travel			
Receipts (million EUR)			3,985
Expenditure (million EUR)			1,419
Balance (million EUR)			2,566

*() from which in Hotels.

Sources: HCSO, MNB

Guest Nights by Type of Accommodation

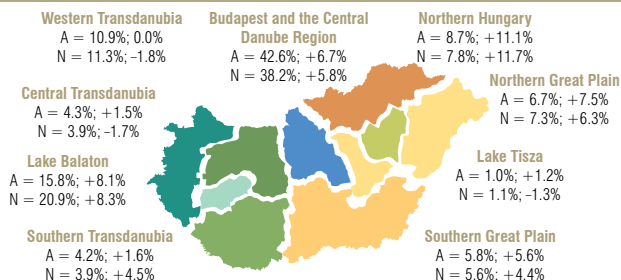
	2012	2013	2013 share	2013/2012
Hotels	16,624,260	17,567,972	76.5%	+5.7%
5 star hotels	1,619,419	849,724	3.7%	n.a.
4 star hotels	8,502,561	6,442,663	28.1%	n.a.
3 star hotels	5,295,114	2,765,365	12.0%	n.a.
Spa hotels	1,828,468	1,890,241	8.2%	+3.4%
Boarding houses	1,373,650	1,396,333	6.1%	+1.7%
Community hostels	1,219,631	1,348,980	5.9%	+10.6%
Bungalows	1,009,926	1,024,574	4.5%	+1.5%
Camping sites	1,577,733	1,630,613	7.1%	+3.4%
Total	21,805,200	22,968,472	100.0%	+5.3%

Figures of hotels include one and two star hotels and hotels without category designation.

Source: HCSO

The change in the number of guest nights at hotels (+5.7%) and at community hostels (+10.6%) was above the average.

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

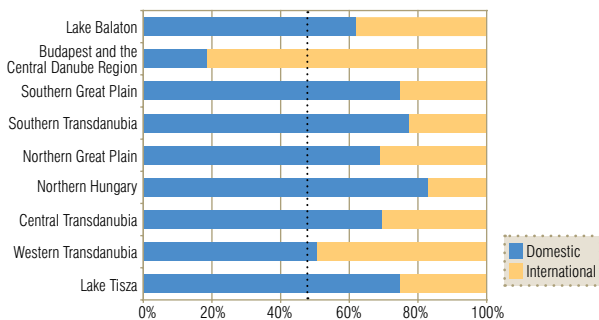


A = Arrivals, N = Guest nights.

Source: HCSO

Geographical concentration is typical of Hungarian tourism: 70.4% of total guest nights are registered in the Budapest and the Central Danube, the Lake Balaton and the Western Transdanubia tourist regions.

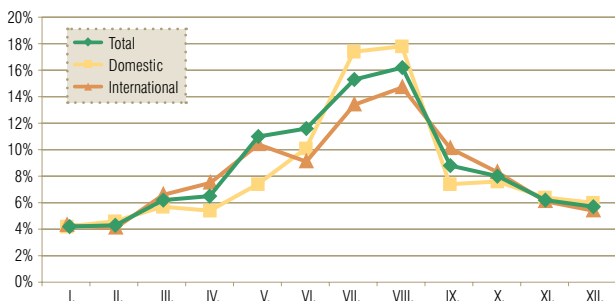
Share of Domestic and International Guest Nights by Tourist Region (% at Commercial Accommodation)



Country average: domestic: 47.8%, international: 52.2%.

Source: HCSO

Monthly Breakdown of Guest Nights at Commercial Accommodation



Source: HCSO

Seasonality is typical of Hungarian tourism: most of the guest nights were generated in July and August (15.3% and 16.2%, respectively). Inbound tourism is less seasonal than domestic tourism.

Number of Guest Nights by Tourist Region

	Domestic	International	Total
Lake Balaton	2,963,812	1,835,131	4,798,943
Budapest and the Central Danube Region	1,604,828	7,167,150	8,771,978
Southern Great Plain	965,520	327,254	1,292,774
Southern Transdanubia	693,665	204,966	898,631
Northern Great Plain	1,152,787	523,908	1,676,695
Northern Hungary	1,489,068	307,205	1,796,273
Central Transdanubia	613,843	270,733	884,576
Western Transdanubia	1,312,869	1,282,056	2,594,925
Lake Tisza	189,197	64,480	253,677
Total	10,985,589	11,982,883	22,968,472

Source: HCSO

More than half (59.8%) of international guest nights are registered in the Budapest and the Central Danube Region, 15.3% are registered in the Lake Balaton tourist region.

Most Visited Hungarian Cities*

	Domestic	International	Total
1. Budapest (906)	Budapest (906)	Budapest (6,913)	Budapest (7,819)
2. Hajdúszoboszló (487)	Hajdúszoboszló (487)	Hévíz (714)	Hévíz (1,049)
3. Siófok (466)	Siófok (466)	Bük (381)	Hajdúszoboszló (750)
4. Hévíz (334)	Hévíz (334)	Sárvár (275)	Siófok (675)
5. Zalakaros (308)	Zalakaros (308)	Hajdúszoboszló (263)	Bük (656)
6. Gyula (281)	Gyula (281)	Balatonfüred (233)	Balatonfüred (508)
7. Balatonfüred (275)	Balatonfüred (275)	Siófok (209)	Sárvár (456)
8. Bük (275)	Bük (275)	Győr (192)	Zalakaros (412)
9. Sopron (270)	Sopron (270)	Zamárdi (110)	Sopron (363)
10. Eger (235)	Eger (235)	Eger (108)	Eger (343)

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

Source: HCSO

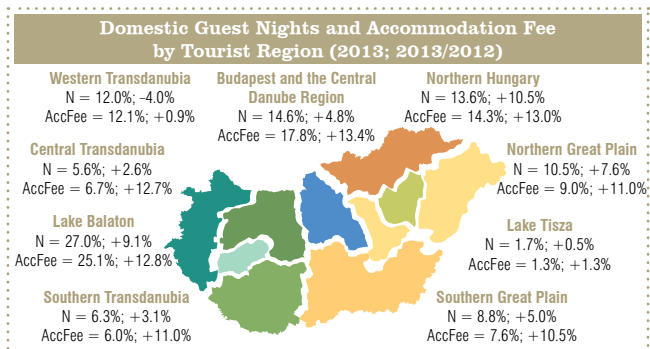
The spas and the Lake Balaton are also popular destinations after Budapest among the visitors.

Domestic Guest Nights by Type of Accommodation				
	2012	2013	2013 (share)	2013/2012
Hotels	7,041,817	7,553,047	68.8%	+7.3%
5 star hotels	172,877	94,224	0.9%	n.a.
4 star hotels	3,300,691	2,501,196	22.8%	n.a.
3 star hotels	2,755,889	1,291,221	11.8%	n.a.
Spa hotels	783,429	809,492	7.4%	+3.3%
Boarding houses	1,017,825	1,043,936	9.5%	+2.6%
Community hostels	1,013,589	1,028,197	9.4%	+1.4%
Bungalows	818,351	804,601	7.3%	-1.7%
Camping sites	521,435	555,808	5.1%	+6.6%
Total	10,413,017	10,985,589	100.0%	+5.5%

Figures of hotels include one and two star hotels and hotels without category designation.

Source: HCSO

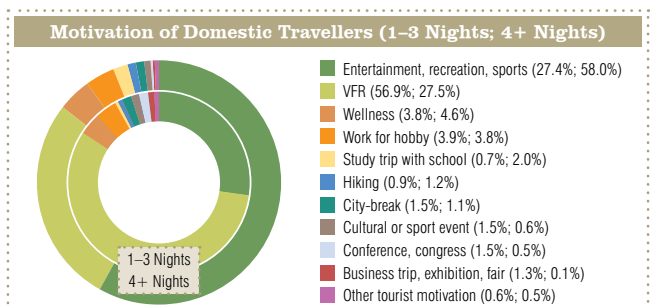
The change in the number of domestic guest nights at hotels (+7.3%) and in camping sites (+6.6%) was above the average.



N = Guest nights, AccFee = Accommodation Fee.

Source: HCSO

Geographical concentration is less typical of domestic tourism: 55.2% of domestic guest nights were registered in the Lake Balaton, the Budapest and the Central Danube and the Northern Hungary tourist regions.



The HCSO investigates only overnight domestic trips with tourist motivation.

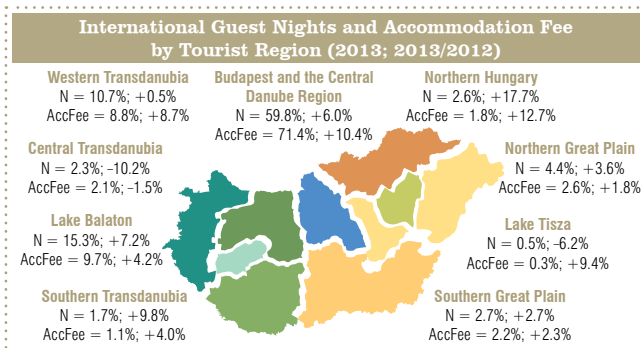
Source: HCSO

International Guest Nights by Type of Accommodation				
	2012	2013	2013 (share)	2013/2012
Hotels	9,582,443	10,014,925	83.6%	+4.5%
5 star hotels	1,446,542	755,500	6.3%	n.a.
4 star hotels	5,201,870	3,941,467	32.9%	n.a.
3 star hotels	2,539,225	1,474,144	12.3%	n.a.
Spa hotels	1,045,039	1,080,749	9.0%	+3.4%
Boarding houses	355,825	352,397	2.9%	-1.0%
Community hostels	206,042	320,783	2.7%	+55.7%
Bungalows	191,575	219,973	1.8%	+14.8%
Camping sites	1,056,298	1,074,805	9.0%	+1.8%
Total	11,392,183	11,982,883	100.0%	+5.2%

Figures of hotels include one and two star hotels and hotels without category designation.

Source: HCSO

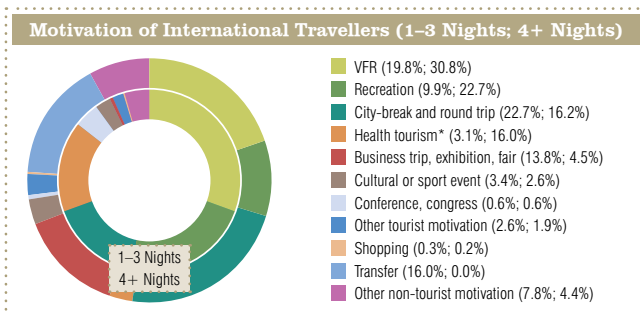
The change in the number of international guest nights at community hostels (+55.7%) and bungalows (+14.8%) was above the average.



N = Guest nights, AccFee = Accommodation Fee.

Source: HCSO

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 wellness, medical treatment in spas, dental tourism, plastic and other surgery.

Source: HCSO

Total tourist motivation: 76.0% and 95.3%, respectively. Total non-tourist motivation: 24.0% and 4.7%, respectively.

Arrivals and Guest Nights at Commercial Accommodation				
	Arrivals		Guest Nights	
	2013	2013/2012	2013	2013/2012
Austria	286,292	-3.6%	804,786	+0.1%
Belgium	76,789	+7.8%	235,059	+11.9%
Croatia	36,829	+2.2%	71,433	-2.6%
the Czech Republic	197,692	+5.4%	565,490	+5.0%
Denmark	43,340	+8.0%	166,783	+4.5%
Estonia	6,923	+24.9%	15,474	+28.1%
Finland	52,089	+19.6%	156,864	+16.0%
France	148,996	+3.0%	390,985	+2.6%
Germany	552,043	-3.2%	2,030,649	-5.4%
Greece	35,486	+2.9%	94,977	+1.9%
Ireland	18,802	-6.7%	50,813	-9.7%
Italy	232,596	+1.6%	627,337	+0.5%
Latvia	7,478	-1.1%	15,460	+10.6%
Lithuania	9,688	+21.1%	19,048	+26.9%
Luxembourg	3,199	-26.1%	8,311	-6.0%
the Netherlands	133,385	-0.1%	469,182	+2.1%
Norway	50,181	+11.7%	156,887	+9.3%
Poland	214,216	+10.4%	538,910	+11.1%
Portugal	16,733	+13.8%	39,492	+8.1%
Romania	213,876	-1.7%	411,065	-1.9%
Russia	196,889	+23.8%	767,851	+25.0%
Serbia	65,889	+5.8%	130,457	+6.2%
Slovakia	130,390	+8.8%	289,311	+8.4%
Slovenia	26,906	-1.0%	53,587	-12.8%
Spain	129,051	-10.1%	319,949	-12.5%
Sweden	88,419	+5.3%	256,537	+5.1%
Switzerland	65,820	+11.9%	189,929	+8.0%
Turkey	56,462	+11.7%	120,279	+12.4%
Ukraine	138,453	-0.1%	262,398	+9.2%
United Kingdom	268,443	+11.1%	678,426	+11.6%
Europe	3,635,520	+3.4%	10,203,763	+3.3%
from which EU*	2,934,107	+1.9%	8,315,610	+1.2%
Asia	390,367	+12.3%	863,578	+16.9%
from which: China	74,939	+4.0%	138,554	+8.3%
India	10,983	+5.6%	29,131	+3.0%
Israel	64,876	+27.3%	225,549	+27.5%
Japan	77,516	+0.5%	162,860	+6.1%
Republic of Korea	69,760	+27.8%	102,521	+43.9%
Africa	17,415	+20.0%	50,684	+26.4%
America	304,912	+19.7%	763,245	+15.8%
from which: Brazil	30,916	+29.7%	77,887	+15.8%
Canada	31,365	+25.5%	84,406	+22.3%
USA	205,868	+17.1%	507,614	+12.7%
Australia and the Pacific	39,478	+28.8%	101,613	+33.5%
Total	4,387,692	+5.4%	11,982,883	+5.2%

*Without Croatia.

Source: HCSO

Arrivals and Guest Nights at Hotels				
	Arrivals		Guest Nights	
	2013	2013/2012	2013	2013/2012
Austria	243,843	-2.9%	612,100	-4.0%
Belgium	62,252	+2.1%	175,132	+4.3%
Croatia	33,816	+2.7%	62,617	-3.8%
the Czech Republic	167,178	+8.6%	470,787	+8.2%
Denmark	35,453	+13.8%	109,609	+9.1%
Estonia	5,883	+35.7%	12,773	+29.8%
Finland	48,659	+20.5%	146,728	+16.6%
France	133,245	+2.3%	344,305	+1.9%
Germany	464,277	-3.2%	1,517,101	-5.5%
Greece	34,481	+3.0%	92,391	+2.5%
Ireland	16,458	-13.5%	43,565	-17.4%
Italy	215,020	+1.6%	578,880	+0.1%
Latvia	6,571	-5.1%	13,291	+7.4%
Lithuania	7,779	+23.4%	15,065	+23.2%
Luxembourg	2,934	-27.0%	7,415	-4.7%
the Netherlands	90,546	-4.5%	231,499	-5.7%
Norway	48,578	+12.2%	151,939	+10.0%
Poland	148,886	+8.5%	343,212	+11.1%
Portugal	15,440	+12.6%	36,240	+6.3%
Romania	181,871	-1.4%	334,144	-1.1%
Russia	191,307	+24.4%	749,237	+26.3%
Serbia	60,103	+4.1%	117,717	+4.0%
Slovakia	98,942	+10.8%	216,836	+10.7%
Slovenia	22,406	-1.6%	42,713	-16.5%
Spain	123,386	-10.6%	304,388	-13.5%
Sweden	84,182	+5.1%	242,969	+5.1%
Switzerland	58,865	+11.3%	166,514	+9.3%
Turkey	54,121	+10.8%	112,034	+9.4%
Ukraine	129,757	-0.2%	243,274	+10.5%
United Kingdom	252,551	+9.7%	631,720	+10.0%
Europe	3,164,185	+3.2%	8,372,828	+2.9%
from which EU*	2,499,784	+1.6%	6,590,278	+0.3%
Asia	375,666	+10.8%	812,762	+13.6%
from which: China	72,948	+3.8%	132,772	+8.3%
India	10,322	+3.4%	26,406	-3.5%
Israel	63,691	+26.5%	222,493	+26.9%
Japan	75,814	+0.2%	155,455	+4.4%
Republic of Korea	64,443	+20.8%	84,096	+22.8%
Africa	16,227	+17.4%	46,159	+22.8%
America	280,857	+15.3%	699,732	+11.8%
from which: Brazil	25,253	+14.4%	63,770	+2.4%
Canada	28,258	+20.3%	76,181	+17.9%
USA	196,285	+15.1%	482,079	+11.4%
Australia and the Pacific	32,692	+19.2%	83,444	+22.8%
Total	3,869,627	+4.9%	10,014,925	+4.5%

*Without Croatia.

Source: HCSO

Commercial Accommodation Capacity				
	Units	Rooms	Beds	2013/2012 (beds)
Hotels	1,031	59,400	142,193	+2.5%
5 star hotels	10	2,241	4,571	n.a.
4 star hotels	167	17,160	39,761	n.a.
3 star hotels	150	9,116	21,987	n.a.
Spa hotels	31	4,802	10,755	+3.8%
Boarding houses	1,033	11,641	30,963	-2.8%
Community hostels	366	12,811	45,743	-3.0%
Bungalows	396	7,613	25,189	-7.1%
Camping sites	260	400	121,553	+32.8%
Total	3,086	91,865	365,641	+8.7%

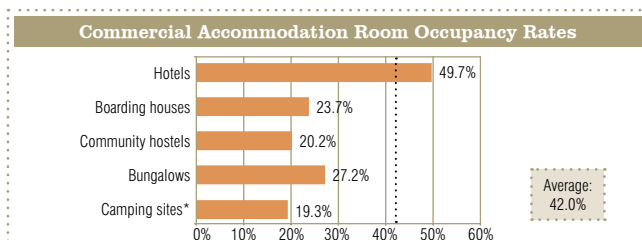
Figures of hotels include one and two star hotels and hotels without category designation.

Source: HCSO (31 July 2013)

Commercial Accommodation Gross Revenues				
	Accommodation	Food & Beverage	Other (incl. breakfast)	Total
million HUF				
Hotels	148,852	56,446	63,498	268,796
5 star hotels	16,563	7,475	4,685	28,722
4 star hotels	54,373	20,536	29,473	104,382
3 star hotels	15,694	5,125	7,815	28,635
Spa hotels	14,482	4,917	12,194	31,593
Boarding houses	7,411	9,212	915	17,539
Community hostels	3,833	616	339	4,788
Bungalows	3,404	656	338	4,398
Camping sites	3,087	137	258	3,482
Total	166,588	67,066	65,348	299,003

Figures of hotels include one and two star hotels and hotels without category designation.

Source: HCSO



* Occupancy rate of tent places.

Source: HCSO

Budapest				
	Commercial Accommodation		Hotels	
	2013	2013/2012	2013	2013/2012
Domestic				
Arrivals (000s)	425	+6.5%	372	+8.9%
Guest nights (000s)	906	+1.8%	798	+8.1%
Average length of stay (nights)	2.1	-4.5%	2.1	-4.5%
International				
Arrivals (000s)	2,867	+6.5%	2,732	+5.4%
Guest nights (000s)	6,913	+6.0%	6,530	+4.8%
Average length of stay (nights)	2.4	0.0%	2.4	0.0%
Total				
Arrivals (000s)	3,292	+6.5%	3,103	+5.8%
Guest nights (000s)	7,819	+5.5%	7,328	+5.1%
Average length of stay (nights)	2.4	0.0%	2.4	0.0%

Source: HCSO

13.6% of commercial accommodation bed places are located in **Budapest**. The capital receives 37.1% of the arrivals and 34.0% of the guest nights at commercial accommodation. Regarding domestic tourism, this means a share of 9.5% of arrivals, and a share of 8.2% 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 57.7% 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)	1,046	+9.7%	722	+9.4%
Guest nights (000s)	2,964	+9.1%	2,021	+8.9%
Average length of stay (nights)	2.8	-0.6%	2.8	-0.5%
International				
Arrivals (000s)	361	+3.8%	247	+1.1%
Guest nights (000s)	1,835	+7.2%	1,235	+3.7%
Average length of stay (nights)	5.1	+3.3%	5.0	+2.6%
Total				
Arrivals (000s)	1,406	+8.1%	969	+7.2%
Guest nights (000s)	4,799	+8.3%	3,256	+6.9%
Average length of stay (nights)	3.4	+0.2%	3.4	-0.3%

Source: HCSO

33.3% of commercial accommodation bed places are located in the **Lake Balaton** tourist region. 15.8% of all guests spend 20.9% of guest nights at the lake. Regarding domestic tourism, this means a share of 23.3% of arrivals, and a share of 27.0% of guest nights. Lake Balaton is also popular among international visitors: the lake and its surroundings have a share of 8.2% of international arrivals, and a share of 15.3% 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	277	+4.8%
Guest nights (000s)	783	809	+3.3%
Average length of stay (nights)	3.0	2.9	-1.4%
International			
Arrivals (000s)	236	232	-1.9%
Guest nights (000s)	1,045	1,081	+3.4%
Average length of stay (nights)	4.4	4.7	+5.4%
Total			
Arrivals (000s)	501	509	+1.6%
Guest nights (000s)	1,828	1,890	+3.4%
Average length of stay (nights)	3.7	3.7	+1.7%

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

Spa hotels has a share of 2.9% 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, 42.8% 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 Ltd. – 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 days
Geographical breakdown	69.9% Budapest, 30.1% countryside
Venues	Budapest, Balaton and surroundings, Pécs, Szeged, Debrecen, Eger
The most important themes	medical science, economics, natural science, 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 Ltd. – Hungarian Convention Bureau

Main Data on Travelling Habits (2008, 2012)

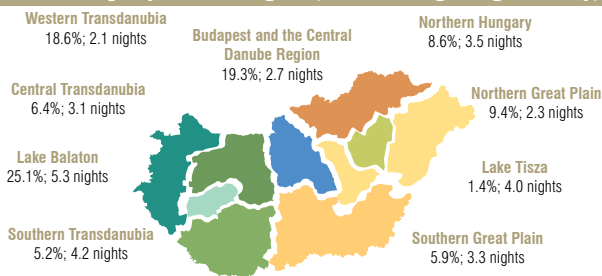
	2008	2012
Share of travellers taking a day trip	63%	73%
from which: only domestic	87%	84%
only abroad	1%	1%
domestic and abroad	12%	15%
Share of travellers taking an overnight trip	58%	63%
from which: only domestic	58%	61%
only abroad	17%	14%
domestic and abroad	25%	25%
Main domestic destinations of 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 Ltd.

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 (share; average length of stay)



Source: Hungarian Tourism Ltd. (2012)

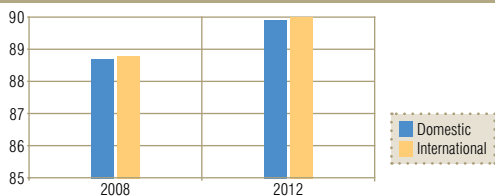
The most popular foreign destinations of overnight trips: Austria (15.4%), Romania (13.9%), Italy (10.8%).

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).

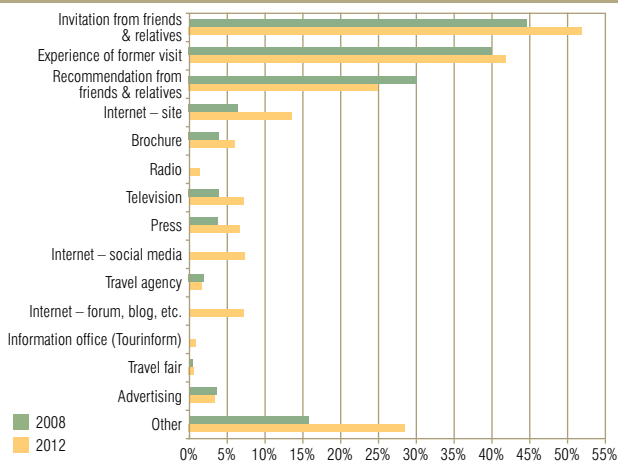
Satisfaction with the main holiday (2008, 2012)



0 = not satisfied, 100 = satisfied.

Source: Hungarian Tourism Ltd.

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 Ltd.

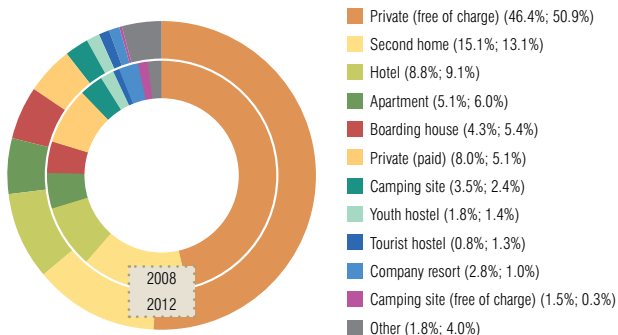
Information Sources of Domestic Travellers

	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.

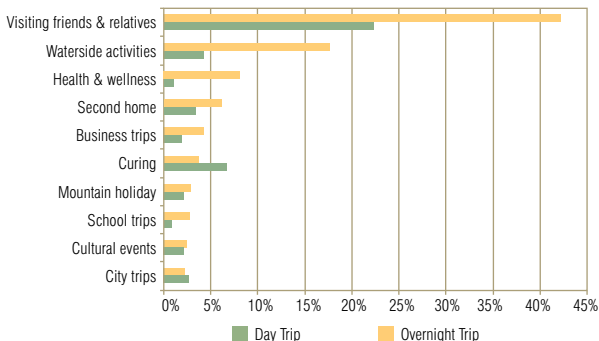
Source: Hungarian Tourism Ltd. (2012)

Accommodation Used by Domestic Travellers (2008, 2012)



Source: Hungarian Tourism Ltd.

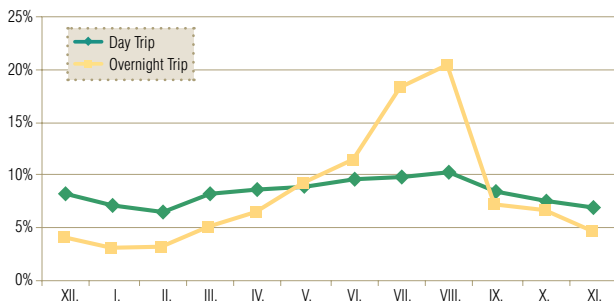
Motivation of Domestic Travellers



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

Source: Hungarian Tourism Ltd. (2012)

Seasonality of Domestic Trips (December 2011 – November 2012)



Source: Hungarian Tourism Ltd.

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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.

Other for Profit Accommodation: accommodation used for accommodation services, but not defined as commercial accommodations, are separate buildings not only used for accommodation services, the number of the rooms is up to eight and the number of the beds is up to sixteen. (According to the 239/2009 (X.20.) GD, other accommodation is to be used instead of private accommodation.)

The publication is based on 2013 final data of the HCSO. The publication is also available in Hungarian. Hereby we would like to thank the Hungarian Central Statistical Office for its contribution.

Hungarian Tourism Ltd.

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

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

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