

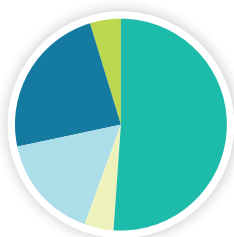
THINK HUNGARY, MORE THAN EXPECTED



TOURISM IN HUNGARY 2015

WITH FINAL DATA

International Tourist Arrivals in the World (million; 2015/2014)



World (1,184.0; +4.4%)

Europe (607.6; +4.7%)

Africa (53.3; -2.9%)

Americas (191.0; +5.0%)

Asia and the Pacific (278.6; +5.4%)

Middle East (53.9; +2.8%)

Source: UNWTO preliminary data

Facts & Figures about Hungary

Territory	93,030 km ²
Population	9,855,571 (1 January 2015)
Population density	106.0 km ²
Capital	Budapest
Capital's population	1,757,618 (1 January 2015)
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, 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 = 315.03 HUF
GDP 2014*	138,395 million USD (32,180 billion HUF)
GDP 2014/2013* (volume index)	+3.7%
GDP per capita 2014*	14,027 USD (3,262 HUF)
Internet penetration	76.1%
International airports	Budapest, Debrecen, Sármellék
Membership in international tourism organisations	UNWTO, ETC, V4, China-CEECs, DCC

* Preliminary data.

Source: Internet World Stats, HCSO

The Economic Impact of Tourism in Hungary

	Direct Impact		Direct and Indirect Impact
GDP (billion HUF)	1,396	5.8%	9.4%
Employment (000s persons)	338	9.2%	12.1%

Source: HCSO (Tourism Satellite Account, 2012)

Balance of Travel

	2014	2015	2015/2014
Receipts (million EUR)	4,421	4,814	+8.9%
Expenditure (million EUR)	1,531	1,650	+7.8%
Balance (million EUR)	2,891	3,164	+9.5%

Source: MNB

SUMMARY DATA 1

Main Data on Hungarian Tourism			
	2014	2015	2015/2014
Number and Expenditure of Tourists			
Number of inbound tourists (000s)	17,253	20,189	+17.0%
<i>Same-day tourists</i>	7,095	7,778	+9.6%
<i>Overnight tourists</i>	10,158	12,410	+22.2%
Expenditure of inbound tourists (million HUF)	1,070,284	1,235,096	+15.4%
<i>Same-day tourists</i>	75,230	90,555	+20.4%
<i>Overnight tourists</i>	995,054	1,144,541	+15.0%
Number of domestic overnight tourists (000s)*	14,854	15,254	+2.7%
Expenditure of domestic overnight tourists (million HUF)*	294,602	307,418	+4.4%
Number of outbound tourists (000s)*	8,933	9,705	+8.6%
Expenditure of outbound tourists (million HUF)*	454,733	507,336	+11.6%
Arrivals and Guest Nights at Commercial Accommodation**			
Domestic			
Arrivals (000s)	5,022 (3,478)	5,474 (3,822)	+9.0% (+9.9%)
Guest nights (000s)	12,082 (8,182)	12,925 (8,803)	+7.0% (+7.6%)
Average length of stay (nights)	2.4 (2.4)	2.4 (2.3)	-1.9% (-2.1%)
International			
Arrivals (000s)	4,617 (4,036)	4,929 (4,275)	+6.7% (+5.9%)
Guest nights (000s)	12,351 (10,274)	12,962 (10,704)	+4.9% (+4.2%)
Average length of stay (nights)	2.7 (2.5)	2.6 (2.5)	-1.7% (-1.6%)
Total			
Arrivals (000s)	9,640 (7,514)	10,403 (8,096)	+7.9% (+7.7%)
Guest nights (000s)	24,434 (18,457)	25,888 (19,507)	+6.0% (+5.7%)
Average length of stay (nights)	2.5 (2.5)	2.5 (2.4)	-1.8% (-1.9%)
Arrivals and Guest Nights at Other Accommodation			
Domestic			
Arrivals (000s)	892	1,043	+17.0%
Guest nights (000s)	2,726	3,161	+15.9%
Average length of stay (nights)	3.1	3.0	-0.9%
International			
Arrivals (000s)	472	618	+31.0%
Guest nights (000s)	1,752	2,201	+25.6%
Average length of stay (nights)	3.7	3.6	-4.2%
Total			
Arrivals (000s)	1,364	1,661	+21.8%
Guest nights (000s)	4,479	5,362	+19.7%
Average length of stay (nights)	3.3	3.2	-1.7%
Commercial Accommodation Gross Revenues			
Domestic accommodation fee (million HUF)	71,923	82,289	+14.4%
International accommodation fee (million HUF)	117,762	131,995	+12.1%
Total accommodation fee (million HUF)	189,685	214,284	+13.0%
Food & beverage (million HUF)	71,987	78,017	+8.4%
Other revenue (million HUF)	71,372	76,468	+7.1%
Total revenue (million HUF)	333,045	368,768	+10.7%

* In some cases, estimated data can be inaccurate due to the small sample size. Data referring to the years 2008–2014 were revised on the 5th March 2015, on the basis of the Census 2011.

** () from which in Hotels.

Source: HCSO

Guest Nights by Type of Accommodation

	2014	2015	2015 (share)	2015/2014
Hotels	18,456,692	19,507,275	75.4%	+5.7%
5 star hotels	912,864	895,807	3.5%	-1.9%
4 star hotels	7,439,518	8,473,799	32.7%	+13.9%
3 star hotels	3,055,563	3,333,477	12.9%	+9.1%
Spa hotels	2,016,449	2,223,220	8.6%	+10.3%
Boarding houses	1,615,432	1,710,816	6.6%	+5.9%
Community hostels	1,567,523	1,766,374	6.8%	+12.7%
Bungalows	1,152,616	1,171,819	4.5%	+1.7%
Camping sites	1,641,413	1,731,609	6.7%	+5.5%
Total	24,433,676	25,887,893	100.0%	+6.0%

Figures of hotels include one- and two-star hotels and hotels without category designation. Volume indexes of hotel categories refer to the units which have valid classification in the period of examination.

Source: HCSO

Except for 5 star hotels, number of guest nights increased in every category. The change in the number of the guest nights at 4 star hotels, the spa hotels and community hostels was well above the country average.

Arrivals and Guest Nights by Tourist Region (2015; 2015/2014)

Western Transdanubia

A = 10.6%; +8.1%
N = 11.1%; +5.5%

Budapest and the Central Danube Region

A = 42.2%; +7.7%
N = 38.2%; +7.1%

Northern Hungary

A = 9.1%; +9.2%
N = 8.3%; +5.8%

Central Transdanubia

A = 4.2%; +4.0%
N = 3.9%; +3.9%

Northern Great Plain

A = 6.9%; +8.7%
N = 7.5%; +6.9%

Lake Balaton

A = 15.1%; +6.3%
N = 19.6%; +2.6%

Lake Tisza

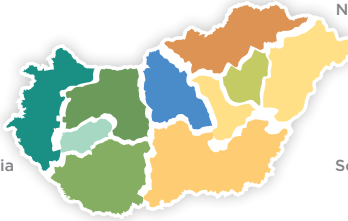
A = 1.1%; +4.8%
N = 1.2%; +11.8%

Southern Transdanubia

A = 4.1%; +8.8%
N = 4.0%; +8.4%

Southern Great Plain

A = 6.6%; +13.0%
N = 6.2%; +8.4%

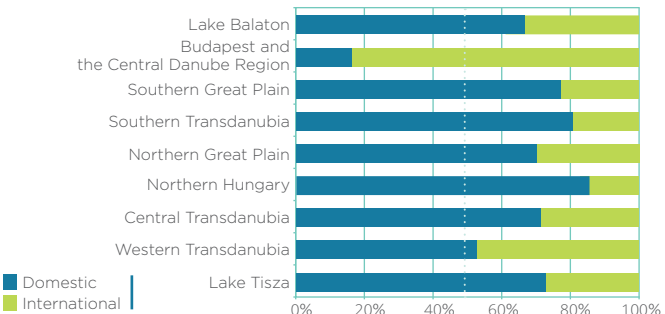


A = Arrivals, N = Guest nights

Source: HCSO

Geographical concentration is typical of Hungarian tourism: 68.9% of total guest nights are registered in the Budapest and the Central Danube, the Lake Balaton and the Western Transdanubia tourist regions.

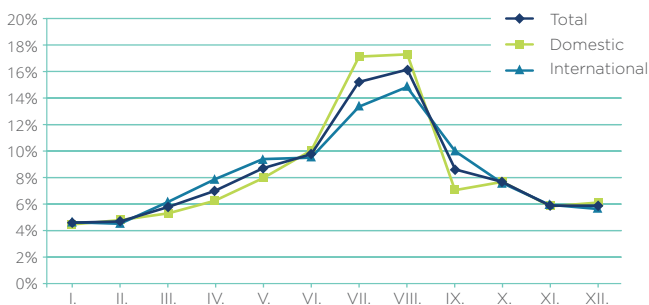
Share of Domestic and International Guest Nights by Tourist Region (% at Commercial Accommodation)



Country average: domestic: 49.9%, international: 50.1%.

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 (15.2% and 16.1%, respectively). Inbound tourism is slightly less seasonal than domestic tourism.

Number of Guest Nights by Tourist Region

	Domestic	International	Total
Lake Balaton	3,331,319	1,746,693	5,078,012
Budapest and the Central Danube Region	1,851,631	8,034,962	9,886,593
Southern Great Plain	1,268,560	340,900	1,609,460
Southern Transdanubia	824,352	199,143	1,023,495
Northern Great Plain	1,369,569	575,729	1,945,298
Northern Hungary	1,807,568	340,965	2,148,533
Central Transdanubia	715,506	293,890	1,009,396
Western Transdanubia	1,533,445	1,344,175	2,877,620
Lake Tisza	223,548	85,938	309,486
Total	12,925,498	12,962,395	25,887,893

Source: HCSO

62.0% of international guest nights are registered in the Budapest and the Central Danube Region, 13.5% are registered in the Lake Balaton tourist region.

Most Visited Hungarian Settlements*

	Domestic	International	Total
1.	Budapest (1,017)	Budapest (7,751)	Budapest (8,768)
2.	Hajdúszoboszló (562)	Hévíz (604)	Hévíz (972)
3.	Siófok (510)	Bük (406)	Hajdúszoboszló (863)
4.	Zalakaros (375)	Hajdúszoboszló (301)	Siófok (714)
5.	Hévíz (369)	Sárvár (270)	Bük (675)
6.	Balatonfüred (333)	Balatonfüred (263)	Balatonfüred (596)
7.	Eger (322)	Siófok (203)	Zalakaros (476)
8.	Gyula (315)	Győr (162)	Sárvár (459)
9.	Sopron (292)	Eger (126)	Eger (448)
10.	Bük (269)	Szeged (105)	Sopron (379)

* () 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

	2014	2015	2015 (share)	2015/2014
Hotels	8,182,298	8,803,349	68.1%	+7.6%
5 star hotels	116,579	127,164	1.0%	+9.1%
4 star hotels	3,075,257	3,574,630	27.7%	+16.2%
3 star hotels	1,417,758	1,584,350	12.3%	+11.8%
Spa hotels	903,737	1,109,382	8.6%	+20.9%
Boarding houses	1,236,710	1,322,221	10.2%	+6.9%
Community hostels	1,169,119	1,240,034	9.6%	+6.1%
Bungalows	922,416	940,651	7.3%	+2.0%
Camping sites	571,803	619,243	4.8%	+8.3%
Total	12,082,346	12,925,498	100.0%	+7.0%

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

Source: HCSO

The change in the number of the domestic guest nights at five- and four-star hotels, furthermore in spa hotels was well above the average.

Domestic Guest Nights and Accommodation Fee by Tourist Region (2015; 2015/2014)

Western Transdanubia
N = 11.9%; +9.1%
AccFee = 11.2%; +13.5%

Budapest and the Central Danube Region
N = 14.3%; +4.9%
AccFee = 17.3%; +13.3%

Northern Hungary
N = 14.0%; +7.1%
AccFee = 15.2%; +12.1%

Central Transdanubia
N = 5.5%; +4.1%
AccFee = 6.4%; +10.7%

Northern Great Plain
N = 10.6%; +8.8%
AccFee = 9.0%; +17.1%

Lake Balaton
N = 25.8%; +4.8%
AccFee = 25.9%; +17.1%

Lake Tisza
N = 1.7%; +6.1%
AccFee = 1.2%; +10.9%

Southern Transdanubia
N = 6.4%; +11.4%
AccFee = 5.6%; +9.5%

Southern Great Plain
N = 9.8%; +10.7%
AccFee = 8.2%; +18.3%



N = Guest nights, AccFee = Accommodation Fee

Source: HCSO

Geographical concentration is less typical of domestic tourism: 54.1% 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 Tourists (1-3 Nights; 4+ Nights)



- Entertainment, recreation, sports (31.3%; 59.9%)
- VFR (55.3%; 29.3%)
- Work for hobby (3.6%; 3.7%)
- Health tourism (3.7%; 3.6%)
- Study trip with school (0.8%; 2.1%)
- Cultural or sport event (2.4%; 0.8%)
- Business trip (2.7%; 0.5%)
- Other tourist motivation (0.2%; 0.1%)

1-3 Nights | 4+ Nights

The HCSO investigates only overnight domestic trips with tourist motivation. Due to the small sample size hiking and city break is included in Entertainment, recreations, sports. Health tourism: wellness, medical treatment in spas. Business trip also includes exhibition, fair, conference and congress.

Source: HCSO

INBOUND TOURISM

International Guest Nights by Type of Accommodation

	2014	2015	2015 (share)	2015/2014
Hotels	10,274,394	10,703,926	82.6%	+4.2%
5 star hotels	796,285	768,643	5.9%	-3.5%
4 star hotels	4,364,261	4,899,169	37.8%	+12.3%
3 star hotels	1,637,805	1,749,127	13.5%	+6.8%
Spa hotels	1,112,712	1,130,838	8.7%	+1.6%
Boarding houses	378,722	388,595	3.0%	+2.6%
Community hostels	398,404	526,340	4.1%	+32.1%
Bungalows	230,200	231,168	1.8%	+0.4%
Camping sites	1,069,610	1,112,366	8.6%	+4.0%
Total	12,351,330	12,962,395	100.0%	+4.9%

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

Source: HCSEO

The change in the number of international guest nights at community hostels and 4 star hotels was well above the average.

International Guest Nights and Accommodation Fee by Tourist Region (2015; 2015/2014)

Western Transdanubia
N = 10.4%; +1.7%
AccFee = 7.5%; +1.2%

Budapest and the Central Danube Region
N = 62.0%; +7.7%
AccFee = 74.6%; +15.7%

Northern Hungary
N = 2.6%; -1.0%
AccFee = 1.7%; +3.0%

Central Transdanubia
N = 2.3%; +3.4%
AccFee = 1.9%; +4.9%

Northern Great Plain
N = 4.4%; +2.8%
AccFee = 2.6%; +7.1%

Lake Balaton
N = 13.5%; -1.2%
AccFee = 8.4%; +1.1%

Lake Tisza
N = 0.7%; +29.8%
AccFee = 0.3%; +28.0%

Southern Transdanubia
N = 1.5%; -2.7%
AccFee = 1.0%; +2.0%

Southern Great Plain
N = 2.6%; +0.8%
AccFee = 1.9%; +5.3%



N = Guest nights, AccFee = Accommodation Fee

Source: HCSEO

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.

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



1-3 Nights | 4+ Nights

- VFR (22.6%; 27.3%)
- Recreation (11.4%; 23.7%)
- City-break and round trip (21.1%; 17.1%)
- Health tourism (2.8%; 15.3%)
- Business trip (11.2%; 4.5%)
- Cultural or sport event (2.8%; 3.6%)
- Other tourist motivation (8.0%; 4.1%)
- Shopping (0.4%; -)
- Transfer (14.0%; -)
- Other non-tourist motivation (5.7%; 4.3%)

Health tourism: wellness, medical treatment in spas, dental tourism, plastic and other surgery. Business trip also includes exhibition, fair, conference and congress.

Source: HCSEO

Total tourist motivation: 79.8% and 95.7%, respectively. Total non-tourist motivation: 20.2% and 4.3%, respectively.

Arrivals and Guest Nights at Commercial Accommodation				
	Arrivals		Guest Nights	
	2015	2015/2014	2015	2015/2014
Austria	297,103	+0.8%	791,675	+2.5%
Belgium	80,712	-4.1%	231,391	-6.0%
Croatia	38,902	-8.1%	72,943	-6.6%
the Czech Republic	238,455	+9.3%	690,915	+8.7%
Denmark	49,446	+13.1%	176,773	+7.3%
Estonia	6,881	+4.1%	15,211	-2.0%
Finland	51,687	-1.1%	153,263	-0.8%
France	163,638	+7.9%	414,406	+5.0%
Germany	548,173	-1.3%	1,963,119	-2.3%
Greece	44,204	+5.9%	118,152	+8.1%
Ireland	28,387	+15.5%	74,896	+13.2%
Italy	251,210	+5.2%	682,007	+6.3%
Latvia	8,025	+4.0%	16,049	+3.8%
Lithuania	11,040	+11.2%	21,660	+14.2%
Luxembourg	3,826	+17.8%	8,963	+8.1%
the Netherlands	119,349	-0.1%	414,806	+1.7%
Norway	53,104	+8.7%	163,777	+7.4%
Poland	245,928	+4.8%	626,407	+5.3%
Portugal	16,667	+0.9%	39,562	-0.8%
Romania	250,750	+8.2%	467,284	+7.9%
Russia	147,803	-21.4%	566,164	-25.8%
Serbia	65,162	-2.0%	128,189	-2.4%
Slovakia	169,982	+10.2%	373,081	+9.4%
Slovenia	26,314	-7.8%	51,503	-5.3%
Spain	149,421	+6.9%	358,315	+9.6%
Sweden	91,196	+14.7%	252,054	+12.1%
Switzerland	67,793	+3.0%	196,616	+3.1%
Turkey	73,147	+27.8%	159,823	+27.3%
Ukraine	102,726	-9.9%	200,631	-13.0%
United Kingdom	351,165	+18.2%	891,358	+18.2%
Europe	3,922,351	+4.2%	10,667,445	+2.7%
from which: EU	3,290,769	+4.7%	8,998,822	+5.4%
Asia	541,748	+20.1%	1,135,780	+19.7%
from which: China	125,857	+39.9%	222,540	+38.5%
India	26,387	+79.1%	63,845	+74.1%
Israel	90,434	+16.0%	291,868	+13.8%
Japan	64,705	-5.9%	139,098	-5.0%
Republic of Korea	104,115	+6.0%	141,873	+9.8%
Africa	27,172	+35.9%	74,742	+25.8%
America	386,805	+13.6%	952,390	+13.0%
from which: Brazil	29,339	-10.4%	72,323	-11.3%
Canada	39,459	+15.9%	105,302	+12.6%
USA	268,766	+15.0%	656,140	+14.7%
Australia and Oceania	50,435	+16.9%	132,038	+18.7%
from which: Australia	38,523	+15.2%	101,541	+16.7%
Total foreign	4,928,511	+6.7%	12,962,395	+4.9%
Total domestic	5,474,390	+9.0%	12,925,498	+7.0%

Source: HCSO

MARKETS 2

Arrivals and Guest Nights in Hotels				
	Arrivals		Guest Nights	
	2015	2015/2014	2015	2015/2014
Austria	246,403	-0.3%	609,165	+1.4%
Belgium	63,862	-5.7%	163,425	-7.6%
Croatia	35,319	-9.5%	65,295	-6.6%
the Czech Republic	193,899	+8.7%	555,074	+7.8%
Denmark	40,524	+15.3%	119,499	+12.8%
Estonia	5,553	+4.9%	12,530	-1.8%
Finland	47,155	-2.7%	140,655	-2.5%
France	144,164	+7.0%	355,676	+4.2%
Germany	453,901	-1.9%	1,422,982	-3.8%
Greece	42,630	+5.0%	113,966	+7.3%
Ireland	22,743	+11.0%	59,954	+9.7%
Italy	230,575	+4.6%	623,330	+6.0%
Latvia	7,024	-0.3%	13,747	+0.7%
Lithuania	8,794	+13.7%	17,308	+16.8%
Luxembourg	3,407	+16.4%	7,739	+6.1%
the Netherlands	82,045	-3.1%	205,856	-3.0%
Norway	50,746	+8.3%	157,260	+7.2%
Poland	168,602	+4.7%	386,827	+6.1%
Portugal	14,266	-4.4%	33,864	-5.2%
Romania	213,683	+7.4%	382,655	+6.4%
Russia	139,414	-22.5%	543,632	-26.3%
Serbia	58,941	-3.0%	115,945	-2.4%
Slovakia	129,849	+8.8%	284,066	+9.4%
Slovenia	21,218	-9.3%	39,448	-6.5%
Spain	138,251	+4.6%	328,789	+7.0%
Sweden	85,571	+14.6%	235,319	+11.7%
Switzerland	60,260	+2.7%	170,766	+2.9%
Turkey	68,239	+26.5%	144,758	+26.9%
Ukraine	94,365	-10.1%	183,827	-13.8%
United Kingdom	319,776	+16.6%	801,987	+16.3%
Europe	3,351,719	+3.3%	8,617,849	+1.6%
from which: EU	2,763,300	+4.1%	7,063,904	+4.6%
Asia	514,204	+19.3%	1,071,751	+19.9%
from which: China	122,396	+40.5%	211,460	+41.1%
India	24,267	+76.9%	58,615	+72.7%
Israel	87,888	+16.2%	284,794	+13.7%
Japan	62,992	-6.3%	133,851	-4.8%
Republic of Korea	94,411	+5.3%	122,856	+10.2%
Africa	25,371	+34.5%	67,721	+21.7%
America	346,607	+11.4%	852,325	+11.4%
from which: Brazil	22,515	-13.1%	54,985	-12.9%
Canada	33,281	+11.8%	88,990	+8.5%
USA	248,683	+12.7%	607,227	+13.0%
Australia and Oceania	36,785	+14.0%	94,280	+17.4%
from which: Australia	26,829	+11.9%	68,580	+15.0%
Total foreign	4,274,686	+5.9%	10,703,926	+4.2%
Total domestic	3,821,658	+9.9%	8,803,349	+7.6%

Source: HCSO

COMMERCIAL ACCOMMODATION

Commercial Accommodation Capacity

	Units	Rooms	Beds	2015/2014 (beds)
Hotels	1,064	60,297	145,558	+1.8%
5 star hotels	10	2,230	4,673	0.0%
4 star hotels	211	20,460	47,852	+8.1%
3 star hotels	167	10,110	24,810	+7.9%
Spa hotels	35	5,417	12,420	+10.4%
Boarding houses	1,121	12,022	31,624	+2.4%
Community hostels	422	13,998	50,352	+1.9%
Bungalows	451	7,998	26,257	+2.6%
Camping sites	263	746	119,788	-1.4%
Total	3,321	95,061	373,579	+0.8%

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

Source: HCSO (31 July 2015)

Commercial Accommodation Gross Revenues

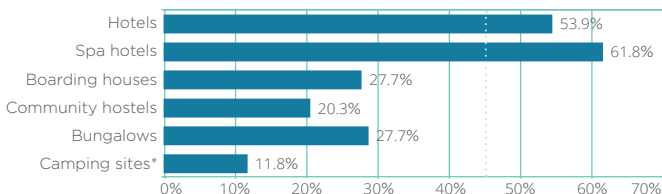
	Accommodation	Food & Beverages	Other (incl. breakfast)	Total
	million HUF			
Hotels	190,029	64,501	73,793	328,324
5 star hotels	21,058	8,828	5,511	35,397
4 star hotels	79,004	26,346	41,382	146,732
3 star hotels	20,570	6,226	9,221	36,018
Spa hotels	20,228	5,835	14,454	40,517
Boarding houses	9,763	11,505	1,268	22,536
Community hostels	6,271	724	435	7,430
Bungalows	4,303	898	474	5,675
Camping sites	3,918	389	498	4,805
Total	214,284	78,017	76,468	368,768

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

Source: HCSO

Accommodation fee in hotels increased by 13.1% compared to 2014, similarly to the commercial accommodation average which grew by 13.0%. Domestic accommodation fee grew by 14.4%, and foreign accommodation fee by 12.1%. Domestic accommodation fee had a balanced increase in all commercial accommodation types. Domestic accommodation fee (+27.9%) and foreign accommodation fee (+36.9%) also increased above the average at community hostels. Accommodation fee per guest night was 8,277 HUF at commercial accommodation, and 9,741 HUF in hotels.

Commercial Accommodation Room Occupancy Rates



Average: 44.9%.

* Occupancy rate of tent places.

Source: HCSO

SPA HOTELS

Spa Hotels			
	2014	2015	2015/2014
Domestic			
Arrivals (000s)	319	391	+22.8%
Guest nights (000s)	904	1,092	+20.9%
Average length of stay (nights)	2.8	2.8	-1.6%
International			
Arrivals (000s)	246	272	+10.4%
Guest nights (000s)	1,113	1,131	+1.6%
Average length of stay (nights)	4.5	4.2	-8.0%
Total			
Arrivals (000s)	565	663	+17.4%
Guest nights (000s)	2,016	2,223	+10.3%
Average length of stay (nights)	3.6	3.4	-6.1%

The HCSO publishes data of only 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.

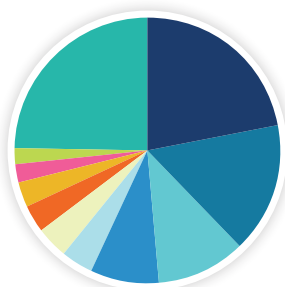
Source: HCSO

Spa hotels have a share of 3.3% of bed places offered by the commercial accommodation establishments. 6.4% of guests arrive at these facilities which means a share of 8.6% of guest nights. 7.1% of domestic arrivals and 8.5% of domestic guest nights are registered at the spa hotels. Health tourism is an important motivation also for international travellers: spa hotels receive 5.5% of arrivals and 8.7% of guest nights. In spa hotels, 49.1% of the guest nights are generated by domestic travellers. The average length of stay at spa hotels is above the commercial accommodation average.

Gross Revenues in Spa Hotels			
	2014	2015	2015/2014
Domestic accommodation (million HUF)	6,234	8,432	+35.5%
Foreign accommodation (million HUF)	10,760	11,796	+9.6%
Food & Beverages (million HUF)	5,302	5,835	+10.0%
Other (incl. breakfast) (million HUF)	13,290	14,454	+8.8%
Total (million HUF)	35,587	40,517	+13.9%

Source: HCSO

Main Source Markets in Spa Hotels (Nights; Share; 2015/2014)



Germany (251,322; 22.2%; -1.7%)
Russia (177,049; 15.7%; -28.2%)
Austria (122,968; 10.9%; +15.0%)
the Czech Republic (93,487; 8.3%; +27.1%)
Slovakia (45,025; 4.0%; +28.0%)
Romania (41,898; 3.7%; +26.2%)
Poland (39,836; 3.5%; +25.6%)
Israel (33,449; 3.0%; +29.6%)
United Kingdom (24,321; 2.2%; +30.3%)
Switzerland (23,960; 2.1%; +3.2%)
Other (277,523; 24.5%; +8.7%)

Source: HCSO

Commercial Accommodation Capacity in Budapest				
	Units	Rooms	Beds	2015/2014 (beds)
Hotels	195	18,933	41,913	+0.9%
5 star hotels	5	1,501	3,169	+0.1%
4 star hotels	58	7,880	16,789	+15.4%
3 star hotels	41	2,759	6,097	+2.6%
Boarding houses	52	664	1,623	+5.5%
Community hostels	53	1,718	6,304	+7.5%
Bungalows	4	80	257	0.0%
Camping sites	8	4	957	+1.3%
Total	312	21,399	51,054	+1.8%

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

Source: HCSO (31 July 2015)

Arrivals and Guest Nights in Budapest				
	Commercial Accommodation		Hotels	
	2015	2015/2014	2015	2015/2014
Domestic				
Arrivals (000s)	536	+12.0%	446	+9.2%
Guest nights (000s)	1,017	+8.4%	828	+5.1%
Average length of stay (nights)	1.9	-3.2%	1.9	-3.7%
International				
Arrivals (000s)	3,269	+7.9%	3,042	+6.3%
Guest nights (000s)	7,751	+7.4%	7,154	+6.0%
Average length of stay (nights)	2.4	-0.4%	2.4	-0.3%
Total				
Arrivals (000s)	3,805	+8.5%	3,488	+6.7%
Guest nights (000s)	8,768	+7.5%	7,982	+5.9%
Average length of stay (nights)	2.3	-0.8%	2.3	-0.6%

Source: HCSO

13.7% of commercial accommodation bed places are located in Budapest. The capital receives 36.6% of the arrivals and 33.9% of the guest nights at commercial accommodation. Regarding domestic tourism, this means a share of 9.8% of arrivals, and a share of 7.9% of guest nights. The international importance of the capital is highlighted by the fact that Budapest has a share of 66.3% of international guests, and a share of 59.7% of international guest nights. Average room occupancy rates in Budapest were 66.1% at commercial accommodation and 69.1% in hotels in 2015.

Commercial Accommodation Gross Revenues in Budapest				
	Accommodation	Food & Beverages	Other (incl. breakfast)	Total
	million HUF			
Hotels	101,417	29,246	29,620	160,283
Boarding houses	805	93	71	969
Community hostels	2,061	59	100	2,220
Bungalows	94	0	42	136
Camping sites	268	0	6	274
Total	104,645	29,398	29,839	163,882

Source: HCSO

LAKE BALATON

Commercial Accommodation Capacity at the Lake Balaton

	Units	Rooms	Beds	2015/2014 (beds)
Hotels	190	12,827	33,439	-1.9%
5 star hotels	1	230	471	0.0%
4 star hotels	26	3,187	7,937	+5.8%
3 star hotels	28	2,870	7,752	-0.7%
Boarding houses	140	1,702	4,630	+5.9%
Community hostels	42	1,832	8,528	-1.7%
Bungalows	127	2,842	9,194	-4.3%
Camping sites	48	164	66,644	+1.4%
Total	547	19,367	122,435	+0.7%

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

Source: HCSO (31 July 2015)

Arrivals and Guest Nights at the Lake Balaton

	Commercial Accommodation		Hotels	
	2015	2015/2014	2015	2015/2014
Domestic				
Arrivals (000s)	1,203	+7.1%	833	+6.2%
Guest nights (000s)	3,331	+4.8%	2,250	+3.5%
Average length of stay (nights)	2.8	-2.2%	2.7	-2.5%
International				
Arrivals (000s)	370	+3.7%	248	+3.1%
Guest nights (000s)	1,747	-1.2%	1,141	-5.0%
Average length of stay (nights)	4.7	-4.7%	4.6	-7.8%
Total				
Arrivals (000s)	1,573	+6.3%	1,081	+5.5%
Guest nights (000s)	5,078	+2.6%	3,391	+0.5%
Average length of stay (nights)	3.2	-3.5%	3.1	-4.7%

Source: HCSO

32.8% of commercial accommodation bed places are located in Lake Balaton tourist region. 15.1% of all guests spend 19.6% of guest nights at the lake. Regarding domestic tourism, this means a share of 22.0% of arrivals, and a share of 25.8% of guest nights. Lake Balaton is also popular among international visitors: the lake and its surroundings have a share of 7.5% of international guests, and a share of 13.5% of international guest nights. Average room occupancy rates at the Lake Balaton were 45.1% at commercial accommodation and 49.7% in hotels in 2015.

Commercial Accommodation Gross Revenues at the Lake Balaton

	Accommodation	Food & Beverages	Other (incl. breakfast)	Total
	million HUF			
Hotels	25,952	7,439	13,316	46,707
Boarding houses	1,159	622	158	1,939
Community hostels	2,032	196	180	2,408
Bungalows	1,726	191	97	2,014
Camping sites	1,586	29	53	1,668
Total	32,456	8,477	13,804	54,737

Source: HCSO

Conferences in Hungary

	Number		Share	
	International	Hungarian	International	Hungarian
Corporate	534	1,430	65.1%	71.5%
Associations	208	338	25.4%	16.9%
Other	78	231	9.5%	11.6%
Total	820	1,999	100.0%	100.0%

Source: Hungarian Tourism Agency - Hungarian Convention Bureau

Europe is the most significant venue of international conferences with a market share of 55.1%. The market share of Hungary of all the conferences is 1.7%. (source: ICCA).

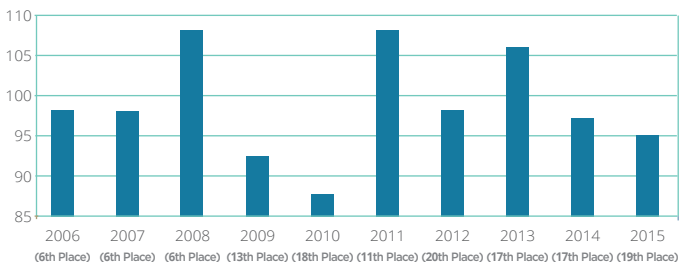
Main Characteristics of International Conferences in Hungary

Number of conferences	820
Average number of participants	189
Average length of stay	3.9 days
Geographical breakdown	73% Budapest, 27% countryside
Congress venue used	81,9% hotels, 4,9% universities, 2,0% congress centers, 11,2% other
Nationality of meeting planners	39,7% Hungarian, 10,0% American, 9,2% British, 6,5% German, 4,1% French, 3,2% Austrian, 2,5% Italian, 2,3% Belgian, 2,3% Swiss, 2,0% Dutch, 18,2% other

International conferences: corporate or association meetings with at least 50 participants that include foreigners. Providing data is voluntary, the results reflect the information made available by service providers.

Source: Hungarian Tourism Agency - Hungarian Convention Bureau

Budapest's Rank by ICCA (Number of Conferences; Rank)



Source: ICCA - International Congress and Convention Association

In 2015 Budapest reached the position as the number 19 destination (together with Beijing) for association congresses and outranked such important conference venues as Stockholm (23.), Sydney (25.), Tokio (28.) or Munich (40.). In the ranking of European cities Budapest was on 15th place in 2015.

More than 1.3 million persons arrived with MICE tourism purpose (conference, congress and business trip, exhibition, fair) to Hungary in 2015, they spent altogether 5.0 million days in the country. Their total spending reached 158,9 billion HUF (source: HCSO).

SZÉCHENYI RECREATION CARD & QUALITY MARKS

Széchenyi Recreation Card			
	2014	2015	2015/2014
Number of accepting units	58,721	65,362	+11.3%
Number of card holders (person)	1,055,741	1,253,674	+18.7%
Amount of grant (000s HUF)	75,915,420	90,505,138	+19.2%
Accommodation subaccount (000s HUF)	14,966,147	16,718,408	+11.7%
Catering subaccount (000s HUF)	51,202,706	62,909,595	+22.9%
Leisure subaccount (000s HUF)	9,746,564	10,877,131	+11.6%
Expenditure (000s HUF)	72,858,322	83,049,949	+14.0%
Accommodation subaccount (000s HUF)	13,988,299	14,971,722	+7.0%
Catering subaccount (000s HUF)	49,439,992	58,217,493	+17.8%
Leisure subaccount (000s HUF)	9,430,032	9,860,735	+4.6%

The Széchenyi Recreation Card is a cafeteria element. The electronical voucher card has three subaccounts (accommodation, catering, leisure) (see Government Decree No. 55/2011 (IV.12.) on the Rules of Issuance and Use of the Széchenyi Recreation Card). Guests at commercial accommodation can also pay from the catering or the leisure subaccount.

Source: Ministry for National Economy

Since its launch (4th July 2011), card holders have paid altogether 267.9 billion HUF by Széchenyi Recreation Card, of which 67.8% (181.7 billion HUF) belonged to the catering, 19.6% (52.5 billion HUF) to the accommodation, and 12.6% (33.6 billion HUF) to the leisure subaccount. (Billion: 1,000.0 million.)

Széchenyi Recreation Card at Commercial Accommodation Units			
	2014	2015	2015/2014
Number of units accepting Széchenyi Recreation Card	1,652	1,711	+3.6%
from which: in hotels	774	797	+3.0%
Revenues from Széchenyi Recreation Card (000s HUF)	16,338,586	17,625,241	+7.9%
from which: in hotels (000s HUF)	14,012,831	15,157,697	+8.2%

Source: HCSO

Quality Marks			
Service	Mark	Partner	Number of Service Providers
Hotel (Hotelstars)	Star	Hungarian Hotel and Restaurant Association	328
Rural accommodation (room, apartment, guest house, camping site)	Sunflower	Hungarian Federation of Rural and Agrotourism	1,213
Private room, apartment	Crown	Nat. Assoc. of Private Room Providers	24
Camping site	Star	Hungarian Campsites Organisation	26
Holiday resort (bungalows)	I., II. class	Hungarian Campsites Organisation	9
Youth hostel	Rucksack	Hungarian Youth Hostels Association	5
Bath	Star	Hungarian Baths Association	22
Water tourism stop	Oar	Hungarian Canoe Federation	33

Source: Ministry for National Economy, January 2016

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ABBREVIATIONS USED IN THE PUBLICATION

China-CEECs: China-Central and Eastern European Countries Tourism Coordination Centre, DCC: Danube Competence Center, ICCA: International Congress and Convention Association, ETC: European Travel Commission, HCSO: Hungarian Central Statistical Office, MNB: Magyar Nemzeti Bank (the central bank of Hungary), UNWTO: World Tourism Organization, V4: European Quartet/Visegrád Four countries.

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 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 2015 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 AGENCY

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

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