

Hungary is waiting for you

We extend our warmest greetings on behalf of Hungary's tourist administration and the whole of the tourist industry. Following a tradition of many years standing, our publication provides the most up-to-date statistical data so that in the light of these figures you can assess the main trends in Hungarian tourism, and the operation of the service providers, who are the key players in the industry.

As you may know, Hungary is to become a full member of the European Union on 1 May 2004, which will certainly pose a number of new challenges for the country. Being one of the driving forces of the Hungarian economy, tourism has long enjoyed Government support, and the participation of the state has always been important. This situation will not change upon accession; in fact, Community funds will contribute to the implementation of further large-scale projects.

Although geographically we can be numbered among the smaller countries, we believe that Hungary is among the leaders when it comes to natural and cultural heritage. To highlight just two areas among the great variety of choice: you must have heard of the wealth of thermal waters and medicinal spas that Hungary possesses, or of the gastronomic delicacies and the excellent wines.

In addition to this, Hungary's tourism possesses a number of untapped resources, the development of which is a top priority, while at the same time, we are ready to be involved in mutually beneficial co-operation.

We hope that this latest publication gives you a full picture of our achievements to date as well as of the opportunities lying ahead.

We trust that you will find the booklet useful, and that it will help you become better acquainted with Hungary. Of course, reading cannot replace personal experience, we therefore cordially invite you to visit Hungary.

In addition to enjoying the justly famed Hungarian hospitality, you will have a chance to see one of the beautifully coloured regions of the many coloured Europe.

Budapest, October 2003

Q. O.

Béla Pál
Political State Secretary
Ministry of Economy and Transport





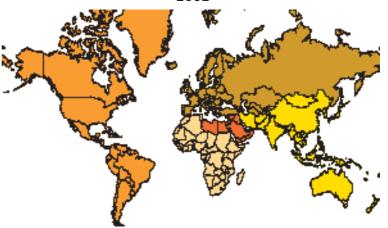
Facts and figures

International tourism in 2002, and Hungary's position in international tourism

Changes in international guests

Following a drop of 0.5 per cent in 2001, international guests rose again by 2.7 per cent in 2002. Globally, 702.6 million guests were registered, which is higher than the figure in the earlier record year of 2000. Though having a shrinking share of the market, Europe continued to be the most popular tourist destination, but there was a change in the second placing: dynamic growth pushed East Asia and the Pacific above the Americas in 2002 (Figure 1).

Figure 1 International guests and international tourism receipts, 2000-2002



million persons

				million percent
Guests	2000	2001	2002	2002/ 2001 (%)
Europe	392.7	390.8	399.8	102.3
Americas	128.0	120.2	114.9	95.6
Asia and the Pacific	115.3	121.1	131.3	108.4
Africa	27.4	28.3	29.1	102.8
Middle East	24.0	23.6	27.6	116.7
Total	6873	684 1	702 6	102 7

billion USD

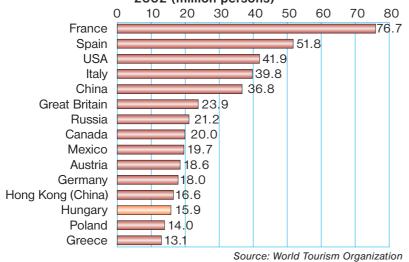
Receipts	2000	2001	2002	2002/ 2001 (%)
Europe	233.0	230.1	240.5	104.5
Americas	132.8	122.4	114.3	93.4
Asia and the Pacific	86.3	86.7	94.7	109.2
Africa	10.9	11.7	11.8	100.9
Middle East	11.5	11.2	13.0	116.1
Total	474.4	462.2	474.2	102.6

Source: World Tourism Organization



The World Tourism Organization (WTO) recorded 15.9 million international guests in Hungary (up by 3.5 per cent on 2001), which means that the country takes the 13th place among the world's most visited tourist destinations, and the eighth place within Europe (Figure 2).

Figure 2 The world's major tourist destinations by international guests, 2002 (million persons)

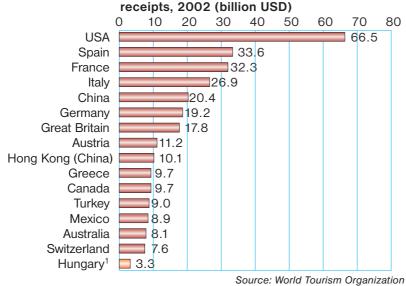


According to WTO estimates, tourism receipts totalled USD 474.2 billion in 2002, which was 3.2 percent more than in 2001. Europe takes the first place in this respect as well, though its share is lower than in the case of guests because it has the highest number of low-spending intra-regional travellers. In Europe, receipts per guest were USD 601.6,

Developments in international tourism receipts

Figure 3 The world's major tourist destinations by international tourism

which is below the international average of USD 674.9 (Figure 1).



1 In 2002 Hungary took the 33rd place regarding



Table 1 International tourism receipts and expenditures in Hungary, 2000-2002

Year	euro	year = 100,0	USD	year = 100,0			
Receip	ts						
2000	3,752	111.7	3,445	96.7			
2001	4,224	112.6	3,770	109.4			
2002	3,448	81.6	3,273	86.8			
Expend	diture						
2000	1,507	103.9	1,388	90.0			
2001	1,628	108.0	1,456	104.9			
2002	1,819	111.7	1,722	118.3			
Balanc	Balance						
2000	2,245	117.6	2,056	101.7			

115.6

62.8 1.550 Source: National Bank of Hungary

2.314

112.5

67.0

In Hungary, international tourism receipts drop by 13.2 per cent compared with 2001, reaching USD 3.3 billion in 2001. In Hungary the tourism receipts per guest (USD 206.2) were still well below the European and the world average (Figure 3).

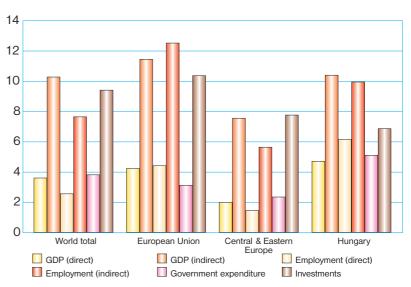
The economic importance of tourism in Hungary

These days tourism is among the world's largest industries. Based on the data derived from the simulated tourism satellite account system, compiled according to the World Travel & Tourism Council (WTTC) methodology, the tourism industry contributed USD 1201.3 billion to the world's total GDP, and employed 67.4 million people in 2002.

The direct economic role of tourism is larger in Hungary than in the world or in the European Union, both in terms of contribution to GDP and employment. WTTC figures show that tourism accounted for 4.9 per cent of Hungary's GDP (HUF 796 billion), and 6.2 per cent of the total employment (241,800 jobs) in the same year.

If we include the multiplier effect,2 tourism made an indirect contribution of HUF 1666.9 billion (10.3% of GDP) to Hungary's economic performance, and of 390,100 jobs (10% of total) to the number of people in employment in 2002 (Figure 4).

Figure 4 The economic role of tourism in Hungary (%), 2002



Source: World Travel and Tourism Council

The statistics prepared by the National Bank of Hungary indicate that the international currency balances for tourism were continuously growing and always closed with a surplus between 1995 and 2001. However, in 2002 the decline in tourism receipts (18.4%) and the rise in tourism expenditure (11.7%) led to a 37.2 percent slump in the interna-

tional tourism balances to € 1,629 million (Table 1)

2001

2002

2.596

1.629

² Taking account of the impact of the tourism industry on other sectors of economy.



Table 2 Summary data on Hungarian tourism, 2000-2002

	2000	2001	2002	2002/2001 (%)
Traffic at frontiers				
Number of international				
visitors ('000s)	31 141	30 679	31 739	103.5
Number of Hungarians				
travelling abroad ('000s)	11 065	11 167	12 966	116.1
International and domestic			t nights	
of public accommodation e	stablishr	nents		
Domestic	0.040	0.000	0.400	105.0
Guests ('000s)	2948	3 003	3 163	105.3
Guest nights ('000s)	7 855	7 7 5 4	8 089	104.3
Average length of stay (days)	2.7	2.6	2.6	99.2
International				
International	0.000	2.070	2.012	00.1
Guests ('000s)	2 9 9 2	3 0 7 0	3 013	98.1
Guest nights ('000s)	10 514	10 894	10 361	95.1
Average length of stay (days)	3.5	3.5	3.4	96.9
Total				
Guests ('000s)	5 941	6 073	6 176	101.7
Guest nights ('000s)	18 369	18 648		98.9
Average length of stay (days)	3.1	3.1	3.0	97.4
Average length of stay (days)	3.1	3.1	3.0	97.4
Of which: in hotels				
or willon: in noteis				
Domestic				
Guests ('000s)	1 566	1 556	1 633	105.0
Guest nights ('000s)	4 115	3 985	4 152	104.2
Average length of stay (days)	2.6	2.6	2.5	99.2
riverage religion of etaly (aaye,				00.2
International				
Guests ('000s)	2 382	2 432	2 427	99.8
Guest nights ('000s)	7 365	7 640	7 529	98.5
Average length of stay (days)	3.1	3.1	3.1	98.7
Total				
Guests ('000s)	3 948	3 988	4 060	101.8
Guest nights ('000s)	11 480	11 626	11 681	100.5
Average length of stay (days)	2.9	2.9	2.9	98.6
International tourism receip	ts and ex	kpenditu	res (mill	ion €)
Receipts	3752	4 224	3 448	81.6
Expenditures	1 507	1 628	1 819	111.7
Dolongo	2 245	2.506	1 620	62.8

Source: Hungarian Central Statistical Office, Hungarian National Bank

2 5 9 6

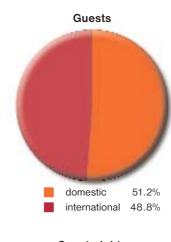
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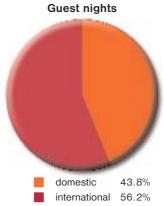
62.8

2 245

Balance

Figure 5 Guests and nights spent at public accommodation establishments (%), 2002







Inbound tourism

In 2002 the number of international arrivals to Hungary was 31.7 million (+3.5%). Three-quarters of the visitors arrived from the neighbouring countries, while residents of the European Union accounted for 26.7 per cent of the total. The share of visitors from across the seas was merely 2.4 per cent (Table 3). At public accommodation establishments, 3 million foreign guests spent a total of 10,4 guest nights in 2002, which means an average length of 3.4 nights (Table 4).

The public accommodation establishments recorded a drop of 534,000 in guest nights compared to the previous year, and the bulk of this decrease can be linked to Hungary's largest source market Germany. In a result of the German economic problems and the 18 per cent fall in the euro's purchasing power in Hungary, which was due to the appreciation of the forint and the higher inflation rate, German guests spent 369,000 fewer guest nights in Hungary than in 2001. Considering Hungary's traditional source markets³, other than Germany, further decreases were recorded in tourist from Italy (–9%), Poland (–10.8%) and The Netherlands (–16.4%). On the other hand, the guest nights spent at public accommodation establishments by Austrian (+3.7%) and Swiss tourists (+2.7%) rose in 2002.

Of the neighbouring countries⁴, only the guest nights spent by Slovaks (-14.4%) and Croats (-16.4%) fell in 2002, whereas substantial increases were observed concerning Ukrainian (+40.5%), Romanian (+13.4%) and Slovenian (+10.6%) traffic, and a moderate rise of guest nights from Serbia and Montenegro (+1.3%). Of the source markets that posted a dynamic growth in 2002^5 , the top positions are taken by the Czech Republic (+21.5%), Great Britain (+12.5%), France (+10.2%) and Denmark (+8.1%). Compared to 2001, the largest decreases in guest nights spent in Hungary - apart from countries over the seas such as Israel (-25.9%), Japan (-10.1%) and Canada (-7.1%) - were recorded in the case of Finland (-9.0%), Russia (-8.3%) and Belgium (-8.0%).

In 2002, 80.6 percent of the foreign guests and 72.7 percent of the guest nights were registered in hotels, with three- (31.6% of foreign nights) and four-star hotels (25.9%) having the largest shares. Of the other public accommodation establishments, camp sites (15%) and guesthouses (7.1%) had a sizeable share of the market. The average length of stay by foreigners is particularly high in non-hotel establishments such as camp sites, bungalows and youth hostels. The average length of stay in hotels is below the average of all pubic accommodation establishments (Table 5).

The seasonal distribution of international guest nights in the two regions with the greatest international traffic showed a marked difference. Particularly popular for summer holidaying, Lake Balaton had over 70 per cent of the nights between May and August, whereas the demand by foreign tourists is of a less seasonal nature in Budapest, which is mainly a destination for business travel and city trips. Here, 43.5 per cent of the international guest nights were recorded between May and August. 2002 (Figure 7).

- 3 The traditional source markets are: Austria, the Netherlands, Germany, Italy, Poland, Switzerland and the USA.
- 4 The neighbouring countries are: Croatia, Romania, Slovakia, Slovenia, Ukraine and Yugoslavia. Austria was removed from this list, as it is considered a traditional source market and a priority market.
- 5 The new dinamically growing source markets are: Belgium, Canada, Czech Republic, China, France, Great Britain, Greece, Israel, Japan, Portugal, Russia, the Nordic countries and Spain.



Table 3 Visitors to Hungary by country of origin ('000s)

Visitors to Hung				
Country	2000	2001	2002	2002/2001 (%)
Austria	5,139	4,790	4,735	98.9
Belgium	79	66	73	110.9
Bosnia-Herzegovina	421	261	131	50.3
Bulgaria	395	535	772	144.4
Croatia	3,304	2,581	2,115	82.0
The Czech Republic	352	447	513	114.8
Denmark	58	54	58	107.3
Estonia	11	12	14	116.4
Finland	88	73	67	91.4
France	188	187	233	125.1
Germany	2,949	2,726	2,739	100.5
Great Britain	212	200	207	103.5
Greece	88	63	68	108.4
Ireland	26	27	27	101.3
Italy	401	419	418	99.7
Latvia	12	14	18	129.0
Lithuania	34	39	42	106.4
Luxembourg	3	3	3	93.7
Macedonia	119	96	30	31.1
Moldova	88	78	66	83.6
The Netherlands	233	211	239	113.4
Norway	37	38	37	98.1
Poland	643	767	906	118.1
Portugal	16	17	18	105.0
Romania	4,661	4,861	5,660	116.4
Russia	125	93	88	94.3
Spain	78	73	81	109.9
Sweden	127	117	123	105.0
Switzerland	131	117	127	108.9
Serbia and Montenegro	2,908	3,488	3,912	112.2
Slovakia	3,921	3,889	4,051	104.1
Slovenia	733	618	598	96.8
Turkey	194	172	143	83.5
Ukraine	2,483	2,691	2,642	98.2
Europe	30,324			103.8
Of which:	,	,	,	
European Union	9,686	9,026	9,089	100.7
Other European countries	20,638	20,829	21,905	105.2
USA	356	355	335	94.5
Canada	62	61	61	99.9
America	448	451	428	94.8
Israel	90	119	90	75.7
Japan	100	97	87	89.4
China	18	16	12	75.5
Asia	320	328	274	86.3
Asia	020	020	217	00.0
Australia and the Pacific	26	27	29	108.3
Africa	23	18	15	82.5
Total	31,141	30,679	31,739	103.5



 ${\it Table~4} \\ {\it Number~of~guests~and~guest~night~at~public~accommodation~establishments~by~country~of~origin,~2002}$

	Pub	lic accomn	nodation	establishm	ents		Of v	which: ho	tels	
Country	Guests ('000s)	2002/ 2001 (%)	Guest nights ('000s)	2002/ 2001 (%)	Average length of stay	Guests ('000s)	2002/ 2001 (%)	Guest nights ('000s)	2002/ 2001 (%)	Average length of stay
Austria	247	106.3	743	103.7	3.0	196	108.2	544	107.6	2.8
Belgium	40	91,8	130	92.0	3.3	31	95.9	87	99.7	2.8
Bulgaria	13	76.8	27	75.2	2.1	11	75.6	22	74.0	2.0
Croatia	30	87.2	61	82.7	2.0	26	87.4	53	87.0	2.0
The Czech Republic	51	119.8	144	121.5	2.8	36	127.4	98	136.2	2.7
Denmark	48	106.4	257	108.1	5.4	25	105.2	89	103.2	3.6
Finland	42	93.2	132	91.0	3.1	35	93.0	112	90.6	3.2
France	113	110.5	267	110.2	2.4	99	113.6	232	114.4	2.3
Germany	810	94.2	4 020	91.6	5.0	591	95.0	2 605	94.1	4.4
Great Britain	143	110.1	391	112.5	2.7	133	111.7	364	114.4	2.7
Greece	27	107.2	70	104.2	2.6	26	107.8	67	104.4	2.6
Italy	174	94.6	450	91.0	2.6	156	95.8	408	91.9	2.6
Ireland	9	103.0	30	128.1	3.3	8	97.1	20	93.8	2.5
Luxembourg	2	44.0	8	31.9	4.0	2	46.5	5	31.1	2.5
The Netherlands	107	92.8	441	83.6	4.1	67	101.8	204	93.6	3.0
Norway	20	95.5	64	95.5	3.2	19	97.2	58	97.8	3.1
Poland	112	99.2	371	89.2	3.3	64	110.4	166	110.7	2.6
Portugal	7	101.7	17	97.3	2.4	6	101.9	15	98.7	2.5
Romania	90	112.3	179	113.4	2.0	68	123.0	119	129.6	1.8
Russia	48	95.9	178	91.7	3.7	39	93.8	131	98.0	3.4
Serbia and Montenegro	80	104.5	170	101.3	2.1	72	106.7	154	102.5	2.1
Slovakia	34	99.1	90	85.6	2.6	19	106.2	43	95.9	2.3
Slovenia	19	103.2	39	110.6	2.1	16	100.8	31	107.8	1.9
Spain	90	94.9	240	98.0	2.7	86	94.6	230	98.0	2.7
Sweden	50	96.8	149	94.0	3.0	44	95.7	130	92.7	3.0
Switzerland	55	105.8	199	102.7	3.6	44	105.4	160	102.4	3.6
Turkey	14	112.3	37	109.4	2.6	13	116.8	35	112.5	2.7
Ukraine	52	127.9	118	140.5	2.3	41	128.6	88	140.5	2.1
Other European countrie		102.2	254	106.2	2.7	86	102.2	233	106.8	2.7
Europe	2 622	99.5	9 2 7 4	95.6	3.5	2 057	101.5	6 501	99.5	3.2
Of which: EU	1 908	97.9	7 344	94.4	3.8	1 504	99.6	5 109	97.5	3.4
Asia	204	86.1	531	86.8	2.6	197	86.6	514	88.1	2.6
Of which: Israel	67	70.2	211	74.1	3.1	65	69.7	206	74.0	3.2
Japan	71	86.1	153	89.9	2.2	69	86.3	146	91.4	2.1
Other Asian countries	66	111.8	167	106.7	2.5	63	116.2	161	111.7	2.6
Africa	6	80.6	19	78.5	3.2	5	83.7	17	80.7	3.4
America	170	93.8	506	95.2	3.0	158	96.6	473	97.8	3.0
Of which: USA	134	91.8	399	93.8	3.0	126	93.7	375	95.3	3.0
Canada	15	94.5	48	92.9	3.2	13	103.5	43	99.9	3.3
Other American countri		108.3	59	108.9	2.7	20	114.6	55	116.6	2.8
Australia and the Pacific		114.7	30	109.5	2.7	9	124.3	25	118.1	2.8
Total international	3 013	98.1	10 361	95.1	3.4	2 427	99.8	7 529	98.5	3.1
Total domestic	3 163	105.3	8 089	104.3	2.6	1 633	105.0	4 152	104.2	2.5
Grand total	6 176	101.7	18 450	98.9	3.0	4 060	101.8	11 681	100.5	2.9



 ${\it Table~5} \\ {\it Number~of~foreign~guests~and~guest~nights~by~type~of~accommodation}$

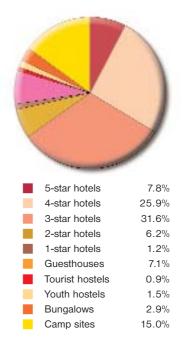
Number of guests Type of ('000s) 2002/2001 accommodation 2000 2001 2002 (%) Hotels 2,382 2,432 2,427 99.8 283 5-star 294 305 103.6 799 809 866 107.0 4-star 3-star 993 1,058 1,025 96.9 254 2-star 219 191 87.0 53 51 40 1-star 78.9 238 Guesthouses 222 232 97.5 34 31 29 91.9 Tourist hostels Youth hostels 43 47 31 64.4 Bungalows 58 61 54 88.5 Camp sites 253 261 241 92.4 Total 2,992 3,070 3,013 98.1

Type of	Number of guest nights					
Type of accommodation		('000s)		2002/2001		
accommodation	2000	2001	2002	(%)		
Hotels	7,365	7,640	7,529	98.5		
5-star	709	753	809	107.4		
4-star	2,538	2,553	2,684	105.1		
3-star	3,090	3,408	3,272	96.0		
2-star	880	776	638	82.3		
1-star	147	151	126	83.5		
Guesthouses	697	765	731	95.6		
Tourist hostels	143	145	96	66.3		
Youth hostels	221	221	152	69.0		
Bungalows	354	361	296	82.1		
Camp sites	1,734	1,763	1,556	88.3		
Total	10,514	10,894	10,361	95.1		

Tuno of	Average length of stay					
Type of accommodation	2000	2001	2002	2002/2001 (%)		
Hotels	3.1	3.1	3.1	98.8		
5-star	2.5	2.6	2.7	103.6		
4-star	3.2	3.2	3.1	98.2		
3-star	3.1	3.2	3.2	99.1		
2-star	3.5	3.5	3.3	94.3		
1-star	2.8	3.0	3.2	106.4		
Guesthouses	3.1	3.2	3.2	98.0		
Tourist hostels	4.2	4.7	3.3	70.8		
Youth hostels	5.1	4.7	4.9	104.3		
Bungalows	6.1	5.9	5.5	92.6		
Camp sites	6.9	6.8	6.5	95.6		
Total	3.5	3.5	3.4	96.9		

Source: Hungarian Central Statistical Office

Figure 6
Number of foreign guests and guest nights by type of accommodation, 2002





Breakdown of foreign guest nights by month ('000's), 2002

Figure 7

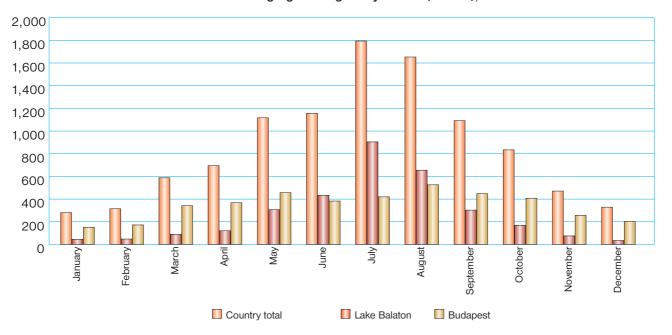
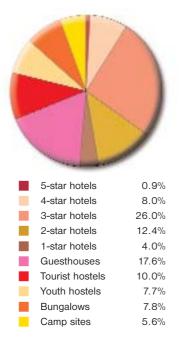


Figure 8
Domestic overnight stays by type of accommodation, 2002



gure 8 Domestic tourism

Domestic traffic at public accommodation establishments rose in 2002, with the number of domestic guests exceeding that of foreigners. In terms of overnight stays, however, foreigners retained their leading position because their average length of stay was higher than that of domestic guests.

Hotels received fewer domestic guests than foreigners: of domestic nights three- (26%) and two-star (12.4%) hotels had the largest shares in 2002. In addition, guesthouses (17.6%) and tourist hostels (10%) had substantial shares in domestic tourism. (Table 6 and Figure 8).

In the Lake Balaton region domestic overnight stays were strongly concentrated in the summer period: almost two-thirds were recorded in the summer months. The seasonal concentration was even higher at Lake Tisza, which is also essentially a summer holiday resort. Domestic guests mostly visit Budapest on business trips, consequently the number of domestic overnight stays was the highest in March-April and September-November (Figure 9).



Table 6
Number of domestic guests and guests night by type of accommodation, 2000-2002

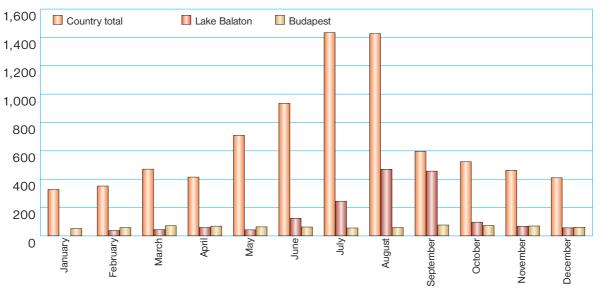
Type of	Guests					
accommodation		('000s)				
accommodation	2000	2001	2002	(%)		
Hotels	1,566	1,556	1,633	105.0		
Guesthouses	569	591	640	108.2		
Tourist hostels	314	314	309	98.5		
Youth hostels	165	195	210	107.5		
Bungalows	195	187	214	114.2		
Camp sites	139	159	157	98.7		
Total	2,948	3,003	3,163	105.3		

Type of	Guests night						
Type of accommodation -		2002/2001					
accommodation	2000	2001	2002	(%)			
Hotels	4,115	3,985	4,152	104.2			
Guesthouses	1,364	1,336	1,422	106.5			
Tourist hostels	838	846	805	95.2			
Youth hostels	503	550	626	113.8			
Bungalows	596	553	633	114.5			
Camp sites	439	484	451	93.1			
Total	7,855	7,754	8,089	104.3			

Type of	Average length of stay					
accommodation	2000	2001	2002	2002/2001 (%)		
Hotels	2.6	2.6	2.5	99.3		
Guesthouses	2.4	2.3	2.2	98.3		
Tourist hostels	2.7	2.7	2.6	96.7		
Youth hostels	3.0	2.8	3.0	105.7		
Bungalows	3.1	3.0	3.0	100.0		
Camp sites	3.2	3.0	2.9	94.4		
Total	2.7	2.6	2.6	99.0		

Breakdown of domestic guest night by month ('000'), 2002

Figure 9





Outbound tourism⁶

In 2002, Hungarian citizens took 3,655 thousand outbound trips⁷, of which 2,470 thousand were holidays⁸. Compared to 2001, the number of outbound holidays increased substantially by 71.3 per cent, while tourism spending went up by 11.7 per cent (Table 7).

Table 7
Outbound trips and holidays taken by Hungarian citizens,
2000–2002

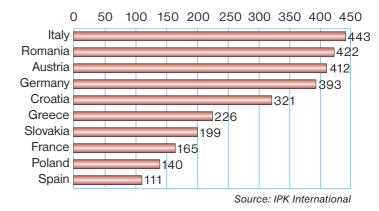
'000s	2000	2001	2002	2002/2001
Outbound trips	3,344	3,291	3,655	111.1%
Of which: holidaymakers	1,420	1,442	2,470	171.3%

Source: IPK International

The most popular destinations for Hungarian holidays were Italy and Croatia, whereas Romania, Austria and Germany are the most frequent destinations for business trips and visits to friends and relatives (Figure 10).

Figure 10
The most popular destinations of outbound trips and holidays by Hungarians, 2002

Number of outbound trips ('000s)



Number of holidays ('000s)

100 150 200 250 300 350 400 450 Italy 399 Croatia **2**88 Romania 282 Austria 244 Greece 220 Germany 179 Slovakia 118 France **117** Poland 93 Spain

Source: IPK International

⁶ Source: IPK International – European Travel Monitor 2000, 2001, 2002.

⁷ Using IPK International methodology, a trip includes at least one overnight stay.

⁸ Using IPK International methodology, a holiday does not include the visiting of friends and relatives.

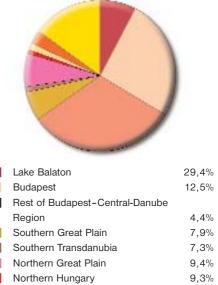


Regional trends of tourism

Hungary's two most popular tourist regions are Budapest and the Central Danube Region, and Lake Balaton. The two regions have 46.3 per cent of the bed capacity at public accommodation establishments, and in 2002 they accounted for 57.4 per cent of the total nights, and 73.2 per cent of the international guest nights. The regional concentration of domestic tourism is much less marked. The share of domestic overnight stays at public accommodation establishments was significant in the Lake Balaton (21.9%), Budapest and the Central Danube Region (15.3%), Northern Hungary (14.3%), Western Transdanubia (11.9%) and the Northern Great Plain (11.6%).

The majority of the tourist regions receive most of their guests from domestic sources, while Germany is the second largest source market. For Budapest, the top generating markets are the United States, Italy and Great Britain, whereas the order for Lake Balaton is Germany, Hungary, Austria, The Netherlands and Denmark. Other significant source markets include Austria for the Transdanubian regions, and Poland for the regions in the Great Plains (Table 8-9).

Figure 11
Regional distribution of beds
in public accommodation
establishments, 2002



Source: Hungarian Central Statistical Office

6,4% 10,0%

3,4%

Central Transdanubia

Western Transdanubia

Lake Tisza

Table 8
The major tourism generating markets for tourist regions according to the number of overnight stays, 2002

Region	1st pla	се	2nd pla	се	3rd place		4th place		5th place		Total of 1st-5th
negion	country	%	country	%	country	%	country	%	country	%	places (%)
Lake Balaton	Germany	42.0	Hungary	35.5	Austria	5.8	The Netherlands	4.1	Denmark	3.5	90.9
Budapest and the											
Central Danube Region	Hungary	22.0	Germany	11.5	Italy	6.2	USA	6.1	Great Britain	5.7	51.5
Of which: Budapest	Hungary	16.1	Germany	12.0	USA	6.8	Italy	6.7	Great Britain	6.3	47.9
Southern Great Plain	Hungary	27.1	Germany	9.9	Romania	1.8	Austria	1.6	Italy	1.5	41.9
Southern Transdanubia	Hungary	69.4	Germany	18.1	Austria	2.4	The Netherlands	1.0	The Czech Rep.	1.0	91.9
Northern Great Plain	Hungary	58.1	Germany	21.5	Poland	6.6	Ukraine	2.0	Austria	1.3	89.5
Northern Hungary	Hungary	81.9	Poland	4.4	Germany	4.3	The Netherlands	1.3	The Czech Rep.	0.9	92.8
Central Transdanubia	Hungary	61.1	Germany	16.7	The Netherlands	5.1	Romania	2.8	Austria	2.6	88.3
Western Transdanubia	Hungary	51.7	Germany	23.2	Austria	11.2	Switzerland	2.4	Italy	1.4	89.9
Lake Tisza	Hungary	67.3	Germany	13.6	Poland	4.7	Slovakia	3.1	The Netherlands	2.0	90.7
Country total	Hungary	43.8	Germany	21.8	Italy	2.4	The Netherlands	2.4	USA	2.2	72.6



 ${\it Table~9}$ Public accommodation capacity and guest turnover by tourist region and type of accommodation, 2002

Lake Balaton		•		-				·	
Lake Balaton Total 652 20 072 98 435 540 1775 541 3 219		Units	Rooms	Beds					
Total						,00	00s		
Total	Laka Dalatan								
Of which: Hotels		650	20.072	09.425	540	1 775	5/1	2 210	
Hotels		032	20072	90 433	540	1775	341	3219	
Guesthouses 189 2 474 6 704 29 92 30 148 Tourist hostels 22 630 2 737 16 72 2 9 Youth hostels 13 1 371 6 077 62 229 13 101 Bungalows 148 2,522 8,068 36 149 25 176 Camp sites 77 - 41,747 43 151 117 856 Budgest and the Central Danube Region Total 433 20,016 56,786 546 1234 1,680 4,370 Of which: Hotels 166 15,806 35,336 372 831 1,580 4,091 Guesthouses 182 2,307 5,807 101 223 63 179 Youth hostels 16 815 2,644 20 42 14 33 Bungalows 16 364 1,266 12 28 2		202	12.075	22 100	251	1 002	255	1 000	
Tourist hostels 22 630 2.737 16 72 2 9 Youth hostels 13 1371 6077 62 229 13 101									
Youth hostels 13 1 371 6 077 62 229 13 101 Bungalows 148 2,522 8,068 36 149 25 176 Camp sites 77 - 41,747 43 151 117 856 Budapest and the Central Danube Region Total 43 20,016 56,786 546 1 234 1,680 4,370 Of which: Hotels 166 15,806 35,336 372 831 1,580 4,091 Guesthouses 182 2,307 5,807 101 223 63 179 Yourist hostels 28 724 3,049 34 91 10 21 Youth hostels 16 815 2,644 20 42 14 33 Bungalows 16 364 1,266 12 28 2 7 Camp sites 25 - 8,684 8 19 12 <t< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>									
Bungalows 148									
Camp sites									
Budapest and the Central Darube Region Total 433 20,016 56,786 546 1 234 1,680 4,370 1,670 1,000			2,322						
Total			anubo Pogior		43	131	117	650	
Of which: Hotels 166 15,806 35,336 372 831 1,580 4,091 Guesthouses 182 2,307 5,807 101 223 63 179 Tourist hostels 28 724 3,049 34 91 10 21 Youth hostels 16 815 2,644 20 42 14 33 Bungalows 16 364 1,266 12 28 2 7 Camp sites 25 - 8,684 8 19 12 38 - of which Budapest 10 41,986 344 800 1,591 4,171 Of which: Hotels 129 14,320 31,643 280 650 1,510 3,961 Guesthouses 68 1,045 2,361 30 59 51 137 Tourist hostels 13 536 2,145 17 50 10 21 Youth hostels					546	1 224	1 690	4 270	
Hotels		433	20,010	30,760	340	1 234	1,000	4,370	
Guesthouses 182 2,307 5,807 101 223 63 179 Tourist hostels 28 724 3,049 34 91 10 21 Youth hostels 16 815 2,644 20 42 14 33 Bungalows 16 364 1,266 12 28 2 7 Camp sites 25 - 8,684 8 19 12 38 - of which Budapest Total 234 16,512 41,986 344 800 1,591 4,171 Of which: Hotels 129 14,320 31,643 280 650 1,510 3,961 Guesthouses 68 1,045 2,361 30 59 51 137 Tourist hostels 13 536 2,145 17 50 10 21 Youth hostels 13 542 1,752 14 30 13 31		166	15 006	25 226	270	021	1 500	4.001	
Tourist hostels 28									
Youth hostels 16 815 2,644 20 42 14 33 Bungalows 16 364 1,266 12 28 2 7 Camp sites 25 - 8,684 8 19 12 38 Total 234 16,512 41,986 344 800 1,591 4,171 Of which: Hotels 129 14,320 31,643 280 650 1,510 3,961 Guesthouses 68 1,045 2,361 30 59 51 137 Tourist hostels 13 536 2,145 17 50 10 21 Youth hostels 13 542 1,752 14 30 13 31 Bungalows 3 69 205 1 7 1 1 1 Camp sites 8 - 3,880 1 4 6 19 <td c<="" td=""><td></td><td></td><td></td><td>· · · · · · · · · · · · · · · · · · ·</td><td></td><td></td><td></td><td></td></td>	<td></td> <td></td> <td></td> <td>· · · · · · · · · · · · · · · · · · ·</td> <td></td> <td></td> <td></td> <td></td>				· · · · · · · · · · · · · · · · · · ·				
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Total 234 16,512 41,986 344 800 1,591 4,171	•		304	,					
Total 234 16,512 41,986 344 800 1,591 4,171 Of which: Hotels 129 14,320 31,643 280 650 1,510 3,961 Guesthouses 68 1,045 2,361 30 59 51 137 Tourist hostels 13 536 2,145 17 50 10 21 Youth hostels 13 542 1,752 14 30 13 31 Bungalows 3 69 205 1 7 1 1 1 Camp sites 8 - 3,880 1 4 6 19 Southern Great Plain Total 359 6,053 26,442 292 706 113 263 Of which: Hotels 73 2,627 6,677 144 362 74 143 Guesthouses 156 1,671 4,393 72 <td>•</td> <td></td> <td>-</td> <td>0,004</td> <td>0</td> <td>19</td> <td>12</td> <td>30</td>	•		-	0,004	0	19	12	30	
Of which: Hotels 129 14,320 31,643 280 650 1,510 3,961 Guesthouses 68 1,045 2,361 30 59 51 137 Tourist hostels 13 536 2,145 17 50 10 21 Youth hostels 13 542 1,752 14 30 13 31 Bungalows 3 69 205 1 7 1 1 1 Camp sites 8 - 3,880 1 4 6 19 Southern Great Plain Total 359 6,053 26,442 292 706 113 263 263 Of which: Hotels 73 2,627 6,677 144 362 74 143 362 74 143 362 74 143 362 74 143 362 34 10 10 10 10		•	16 512	<i>1</i> 1 096	2//	800	1 501	1171	
Hotels		234	10,512	41,900	344	800	1,591	4,171	
Guesthouses 68 1,045 2,361 30 59 51 137 Tourist hostels 13 536 2,145 17 50 10 21 Youth hostels 13 542 1,752 14 30 13 31 Bungalows 3 69 205 1 7 1 1 Camp sites 8 - 3,880 1 4 6 19 Southern Great Plain Total 359 6,053 26,442 292 706 113 263 Of which: Hotels 73 2,627 6,677 144 362 74 143 Guesthouses 156 1,671 4,393 72 140 19 38 Tourist hostels 8 109 558 3 10 0 0 Sungalows 47 698 1,962 22 64 7 20		120	1/ 320	31 6/13	280	650	1 510	3 061	
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Youth hostels 13 542 1,752 14 30 13 31 Bungalows 3 69 205 1 7 1 1 Camp sites 8 - 3,880 1 4 6 19 Southern Great Plain Total 359 6,053 26,442 292 706 113 263 Of which: Hotels 73 2,627 6,677 144 362 74 143 Guesthouses 156 1,671 4,393 72 140 19 38 Tourist hostels 36 948 3,884 28 66 1 5 Youth hostels 8 109 558 3 10 0 0 Bungalows 47 698 1,962 22 64 7 20 Camp sites 39 - 8,968 22 65 13 57									
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Tourist hostels 36 948 3,884 28 66 1 5 Youth hostels 8 109 558 3 10 0 0 Bungalows 47 698 1,962 22 64 7 20 Camp sites 39 - 8,968 22 65 13 57 Southern Transdanubia Total 324 6,250 24,418 301 679 82 300 Of which: Hotels 52 2,085 5,056 103 212 51 152 Guesthouses 177 1,668 4,298 71 175 18 69 Tourist hostels 19 428 2,138 45 82 1 2 Youth hostels 27 1,554 4,738 47 111 1 4 Bungalows 28 515 1,650 26 67 2 10<									
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Of which: Hotels 52 2,085 5,056 103 212 51 152 Guesthouses 177 1,668 4,298 71 175 18 69 Tourist hostels 19 428 2,138 45 82 1 2 Youth hostels 27 1,554 4,738 47 111 1 4 Bungalows 28 515 1,650 26 67 2 10			6.250	24 418	301	679	82	300	
Hotels 52 2,085 5,056 103 212 51 152 Guesthouses 177 1,668 4,298 71 175 18 69 Tourist hostels 19 428 2,138 45 82 1 2 Youth hostels 27 1,554 4,738 47 111 1 4 Bungalows 28 515 1,650 26 67 2 10		J24	0,200	21,410	- 001	- 013	02		
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Tourist hostels 19 428 2,138 45 82 1 2 Youth hostels 27 1,554 4,738 47 111 1 4 Bungalows 28 515 1,650 26 67 2 10									
Youth hostels 27 1,554 4,738 47 111 1 4 Bungalows 28 515 1,650 26 67 2 10									
Bungalows 28 515 1,650 26 67 2 10									
,									
	Camp sites	21	-	6,538	9	33	10	63	



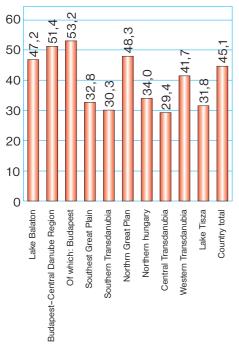
 ${\it Table~9} \\ {\it Public~accommodation~capacity~and~guest~turnover~by~tourist~region~and~type~of~accommodation,~2002}$

	Units	Rooms	Beds	Domestic quests	Domestic guest nights	International guests	International guest nights
					,00	00s	
Northern Great	Dlain						
Total	329	7,488	31,488	350	937	132	675
Of which:	329	7,400	31,400	330	931	132	073
Hotels	75	3,162	7,501	185	538	81	403
Guesthouses	125	2,644	8,170	83	179	21	83
Tourist hostels	23	625	2,551	19	54	3	11
Youth hostels	14	271	1,314	12	42	1	6
	51	786	2,507	22	65	7	38
Bungalows	41	700	9,445	28	58	19	134
Camp sites			9,445	28	58	19	134
Northern Hunga		7 721	21 100	407	1 155	90	256
Total	422	7,731	31,108	497	1,155	89	256
Of which:	70	0.400	E 0.44	101	447	T 4	110
Hotels	70	2,433	5,641	194	417	54	140
Guesthouses	167	2,488	7,802	130	280	15	40
Tourist hostels	68	1,264	5,633	75	190	6	28
Youth hostels	26	733	3,152	39	117	1	5
Bungalows	58	813	2,863	47	123	3	10
Camp sites	33	-	6,017	11	29	10	33
Central Transda							
Total	257	4,128	21,547	180	446	79	284
Of which:							
Hotels	51	1,539	3,590	70	159	46	108
Guesthouses	100	998	2,508	29	71	15	50
Tourist hostels	32	671	2,949	34	93	1	5
Youth hostels	13	405	1,733	17	44	1	4
Bungalows	32	515	2,392	17	42	3	16
Camp sites	29	-	8,375	13	35	14	101
Western Transd	anubia						
Total	484	8,839	33,419	387	966	277	902
Of which:							
Hotels	101	4,386	10,023	193	505	179	537
Guesthouses	239	2,336	6,255	107	217	49	116
Tourist hostels	51	1,412	5,874	55	147	5	13
Youth hostels	5	68	542	7	28	0	1
Bungalows	41	637	1,871	19	52	4	11
Camp sites	47	-	8,854	6	17	41	224
Lake Tisza							
Total	117	1,301	11,520	70	192	19	93
Of which:		,	•				
Hotels	15	399	973	18	46	9	27
Guesthouses	26	317	807	17	45	2	7
Tourist hostels	5	104	452	3	10	0	1
Youth hostels	2	18	123	1	3	0	0
Bungalows	42	463	1,405	14	44	2	9
Camp sites	27	-	7,760	17	45	7	50

Source: Központi Statisztikai Hivatal



Figure 12
Hotel occupancy rates by tourist region (%), 2002



Source: Hungarian Central Statistical Office

Data for public accommodation establishments

The number of establishments, as well as that of their rooms and beds, has increased since 2000, reaching 3,377 units with over 335,000 beds in 2002. Although roughly one-third of beds are in hotels, another one-third at camp sites, these two kinds of establishment had unequal shares of the overnight stays, arising from their different nature, and the structure of tourist demand. Hotels accounted for 63.3 per cent, while camp sites for only 10.9 percent. Of the different types of accommodation, only the number of beds in two-star hotels have fallen since 2001, on the other hand, dynamic growth in places was reported by bungalows, youth hostels, as well as one- and three-star hotels in 2002 (Table 10).

In 2002 in all the tourist regions, therefore in Hungary as a whole, hotels had the highest occupancy rates. Bed and room occupancy rates were above the national average at Lake Balaton and in Budapest and the Central Danube Region, the two regions with the highest volume of international traffic, and in the Northern Great Plain (Tables 11 and Figure 12).

The average price of hotel rooms strongly related to the exchange rates of the euro and the US dollar, which gradually declined in 2001 and 2002. This was reflected in the falling average room prices of three-, four- and five-star hotels. Compared to the same periods in the preceding year, the average room price in these categories was decreasing between December 2001 and July 2002. As for one- and two-star hotels, which normally have a larger domestic traffic, the average room price was steadily rising in 2001 and 2002. However, their average prices and total revenues fell below those in higher category hotels (Table 12 and Figure 13).

Table 10

Public accommodation capacity by type of accommodation, 2002

Time of		Number of units				Number	of rooms		ı	lumber of b	eds (places	
Type of accommodation	2000	2001	2002	2002/ 2001 (%)	2000	2001	2002	2002/ 2001 (%)	2000	2001	2002	2002/ 2001 (%)
All hotels	718	736	806	109.5	42,362	43,738	45,512	104.1	100,604	104,232	107,899	103.5
****	10	11	12	109.1	2,538	2,750	2,840	103.3	5,313	5,771	5,979	103.6
****	64	72	80	111.1	8,174	9,094	9,562	105.1	17,653	19,961	20,878	104.6
***	341	360	411	114.2	19,402	20,358	21,696	106.6	45,272	47,750	50,999	106.8
**	218	217	222	102.3	9,287	8,883	8,513	95.8	24,339	23,374	22,115	94.6
*	85	76	81	106.6	2,961	2,653	2,901	109.3	8,027	7,376	7,928	107.5
Guesthouses	1,210	1,258	1,361	108.2	15,508	16,159	16,903	104.6	42,969	43,993	46,744	106.3
Tourist hostels	260	261	284	108.8	6,521	6,162	6,806	110.5	29,099	27,509	29,267	106.4
Youth hostels	86	99	124	125.3	4,695	4,890	5,344	109.3	17,504	18,509	20,881	112.8
Bungalows	372	374	463	123.8	5,890	6,212	7,313	117.7	19,976	20,829	23,984	115.1
Camp sites	319	316	339	107.3	-	-	-	-	102,562	102,557	106,388	103.7
Total	2,965	3,044	3,377	110.9	74,976	77,161	81,878	106.1	312,714	317,629	335,163	105.5



Table 11
Public accommodation capacity by tourist region and type of accommodation, 2002

		Hotels	Gu	esthouses	Tourist a	and Youth hostels*	В	ungalows	C	amp sites		Total
Régió	%	2002/ 2001 (%)	%	2002/ 2001 (%)	%	2002/ 2001 (%)	%	2002/ 2001 (%)	%	2002/ 2001 (%)	%	2002/ 2001 (%)
Lake Balaton	36.7	104.0	21.4	105.4	31.2	97.2	27.7	93.9	17.4	83.0	28.4	97.1
Budapest and the												
Central Danube Region	38.3	95.0	20.8	94.9	20.4	82.9	15.4	79.6	5.2	162.0	33.0	98.7
Of which: Budapest	39.8	94.6	22.7	90.5	22.2	77.4	28.1	97.1	6.1	267.0	37.0	98.5
Southern Great Plain	21.7	103.4	15.6	90.1	9.7	79.2	20.5	104.7	9.1	93.1	16.0	97.3
Southern Transdanubia	22.7	90.9	17.7	100.6	18.2	87.6	21.3	91.0	7.9	8.08	17.3	91.1
Northern Great Plain	37.1	100.3	18.1	89.5	13.0	88.4	21.2	95.3	12.9	79.4	23.6	93.8
Northern Hungary	27.6	95.9	14.0	103.9	20.4	94.7	21.4	97.8	7.3	92.6	19.0	98.4
Central Transdanubia	20.8	90.5	15.0	111.6	16.6	83.8	9.5	44.9	10.1	84.0	14.8	84.7
Western Transdanubia	31.4	96.7	15.5	86.8	11.2	86.7	17.9	94.0	12.9	100.1	19.9	94.2
Lake Tisza	24.4	99.2	22.2	107.2	10.5	74.1	21.4	109.6	8.1	90.2	13.7	97.4
Country total	33.9	97.9	17.2	96.2	17.9	89.2	20.7	89.2	12.4	90.1	24.0	95.5

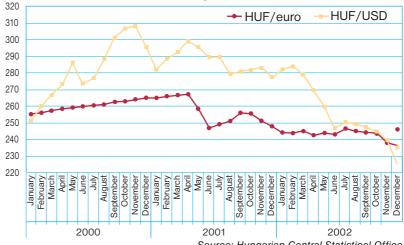
^{*} Due to data security reasons data of tourist and youth hostels may be published merged.

 ${\it Table~12}$ Average prices and price index of hotel rooms (double-bedrooms with bathroom), 2002

		****	****	***	**	*	Hote	ls total
Average	e price			hotels			for ordered	Previous
				HUF			forint	year = 100.0
February								
	2000	42,499	16,892	7,900	5,517	4,495	13,312	111,3
	2001	44,124	17,971	8,904	6,079	4,826	14,631	109,9
	2002	37,529	16,908	8,726	6,739	5,618	14,124	96,5
May		•	·	•	·	,	,	
	2000	46,563	20,393	8,762	5,671	2,686	13,953	104,8
	2001	46,575	21,649	9,362	5,967	3,855	15,484	111,0
	2002	43,195	18,303	9,877	6,918	5,810	15,172	98,0
July								
	2000	42,903	19,220	10,374	6,323	4,511	14,116	103,7
	2001	40,484	20,507	9,630	6,663	4,726	14,687	104,0
	2002	37,604	19,268	10,416	7,423	5,823	15,182	103,4
December								
	2000	39,593	19,824	10,372	7,550	4,600	15,712	107,0
	2001	37,604	17,870	9,287	6,820	4,775	14,603	92,9
	2002	39,981	18,049	9,559	7,152	5,724	15,452	105,8
Price index								
2002/200	1,(%)	90,5	88,5	104,5	105,8	102,0	94,7	-



Figure 13 Changes in the forint's exchange rate to the US dollar and the euro, 2000-2002



The public accommodation establishments posted total revenues of HUF 161.5 billion in 2002, more than half of which was from room charges (HUF 87.6 billion), while HUF 41.8 billion came from catering and HUF 32.1 billion from other services. Thanks to the fact that the latter two sources of income swelled by over ten per cent, the total revenues in public accommodation establishments rose by 5.9 per cent in 2002, which exceeds the rate of inflation but is below the growth in the consumer price index observed in the industry. The drop in room charges paid by foreigners, which account for approximately three-quarters of the total, was set off by the substantial increase in revenues originating from Hungarians (Table 13).

Table 13 Income of public accommodation by type of establishment, 2002

	Room charges paid by Hungarians			Total roo	m charges	Catering revenues		other s	ervices	Total revenues	
Million HUF	2002/ 2001 (%)	Million HUF	2002/ 2001 (%)	Million HUF	2002/ 2001 (%)	Million HUF	2002/ 2001 (%)	Million HUF	2002/ 2001 (%)	Million HUF	2002/ 2001 (%)
15 768	113,0	58 307	98,1	74 075	100,9	34 426	114,6	30 429	110,4	138 929	106,1
1 463	99,8	18 442	95,7	19 905	96,0	8 795	118,6	5 689	112,7	34 389	103,6
3 929	132,6	23 694	103,0	27 623	106,4	11 790	114,4	12 440	115,9	51 853	110,3
7 252	113,6	14 091	96,5	21 343	101,7	11 395	113,4	10 492	106,9	43 230	105,8
2 585	100,2	1800	79,9	4 385	90,7	2 280	110,8	1 629	92,2	8 294	95,8
539	97,4	280	90,8	819	95,0	166	76,8	179	92,6	1 164	91,6
3 773	114,7	2 895	96,5	6 667	106,0	6 480	107,4	924	103,3	14 072	106,5
928	100,7	137	69,4	1 065	95,1	251	101,4	57	139,0	1 373	97,5
770	124,9	304	67,7	1 073	100,8	63	122,5	65	72,7	1 202	99,6
1 164	132,9	921	86,2	2 085	107,3	505	174,7	227	130,9	2 817	117,1
477	104,3	2 137	93,4	2 614	95,2	102	116,4	384	95,2	3 100	95,8
22 879	113,8	64 701	97,4	87 580	101,2	41 827	113,8	32 086	110,0	161 493	105,9
	15 768 1 463 3 929 7 252 2 585 539 3 773 928 770 1 164 477	by Hungarians Million HUF 2002/2001 (%) 15 768 113,0 1 463 99,8 3 929 132,6 7 252 113,6 2 585 100,2 539 97,4 3 773 114,7 928 100,7 770 124,9 1 164 132,9 477 104,3	by Hungarians by form Million HUF 2002/2001 (%) Million HUF 15 768 113,0 58 307 1 463 99,8 18 442 3 929 132,6 23 694 7 252 113,6 14 091 2 585 100,2 1 800 539 97,4 280 3 773 114,7 2 895 928 100,7 137 770 124,9 304 1 164 132,9 921 477 104,3 2 137	by Hungarians by foreigners Million HUF 2002/2001 (%) Million HUF 2002/2001 (%) 15 768 113,0 58 307 98,1 1 463 99,8 18 442 95,7 3 929 132,6 23 694 103,0 7 252 113,6 14 091 96,5 2 585 100,2 1 800 79,9 539 97,4 280 90,8 3 773 114,7 2 895 96,5 928 100,7 137 69,4 770 124,9 304 67,7 1 164 132,9 921 86,2 477 104,3 2 137 93,4	by Hungarians by foreigners lotal roo Million HUF 2002/2001 (%) Million HUF 2001 (%) Million HUF 15 768 113,0 58 307 98,1 74 075 1 463 99,8 18 442 95,7 19 905 3 929 132,6 23 694 103,0 27 623 7 252 113,6 14 091 96,5 21 343 2 585 100,2 1 800 79,9 4 385 539 97,4 280 90,8 819 3 773 114,7 2 895 96,5 6 667 928 100,7 137 69,4 1 065 770 124,9 304 67,7 1 073 1 164 132,9 921 86,2 2 085 477 104,3 2 137 93,4 2 614	by Hungarians by foreigners lotal room charges Million HUF 2002/2001 (%) Million HUF 2002/2001 (%) Million HUF 2002/2001 (%) 15 768 113,0 58 307 98,1 74 075 100,9 1 463 99,8 18 442 95,7 19 905 96,0 3 929 132,6 23 694 103,0 27 623 106,4 7 252 113,6 14 091 96,5 21 343 101,7 2 585 100,2 1 800 79,9 4 385 90,7 539 97,4 280 90,8 819 95,0 3 773 114,7 2 895 96,5 6 667 106,0 928 100,7 137 69,4 1 065 95,1 770 124,9 304 67,7 1 073 100,8 1 164 132,9 921 86,2 2 085 107,3 477 104,3 2 137 93,4 2 614 95,2	by Hungarians by foreigners lotal room charges Catering Million HUF 2002 / 2001 (%) Million HUF 2002 / 2001 (%) Million HUF 2001 (%) Million HUF 15 768 113,0 58 307 98,1 74 075 100,9 34 426 1 463 99,8 18 442 95,7 19 905 96,0 8 795 3 929 132,6 23 694 103,0 27 623 106,4 11 790 7 252 113,6 14 091 96,5 21 343 101,7 11 395 2 585 100,2 1 800 79,9 4 385 90,7 2 280 539 97,4 280 90,8 819 95,0 166 3 773 114,7 2 895 96,5 6 667 106,0 6 480 928 100,7 137 69,4 1 065 95,1 251 770 124,9 304 67,7 1 073 100,8 63 1 164 132,9 921	by Hungarians by foreigners lotal room charges Catering revenues Million HUF 2002/2001 (%) Million HUF 2002/2001 (%) Million HUF 2002/2001 (%) Million HUF 2001 (%) 2002/2001 (%) 15 768 113,0 58 307 98,1 74 075 100,9 34 426 114,6 1 463 99,8 18 442 95,7 19 905 96,0 8 795 118,6 3 929 132,6 23 694 103,0 27 623 106,4 11 790 114,4 7 252 113,6 14 091 96,5 21 343 101,7 11 395 113,4 2 585 100,2 1 800 79,9 4 385 90,7 2 280 110,8 539 97,4 280 90,8 819 95,0 166 76,8 3 773 114,7 2 895 96,5 6 667 106,0 6 480 107,4 928 100,7 137 69,4 1 065 95,1 251 101,4	Norm charges paid by Hungarians Room charges paid by Hungarians Room charges paid by foreigners Total room charges Catering revenues Other s and br	by Hungarians by foreigners lotal room charges Catering revenues other services and breakfast Million HUF 2002 / 2001 (%) Million HUF 2002 / 2001 (%) Million HUF 2002 / 2001 (%) Million HUF 2001 (%) MILION HU	Norm Charges paid by Hungarians Norm Charges paid by Hungarians Norm Charges paid by Hungarians Norm Charges Catering revenues Other services and breakfast



Data of private accommodation

Private accommodation facilities must not be overlooked when analysing tourism in Hungary. In 2002 there were 45,300 registered units with a total of 242,200 beds. Because of the high regional concentration of private rooms in cities and resorts, two-thirds of the beds were in the Lake Balaton region. Private rooms in rural areas, which account for a smaller share of private accommodation, showed a lower degree of regional concentration.

In 2002 635 thousand guests stayed a total 3.5 million nights in private accommodation. The average length of stay is 5.5 nights, almost twice as much as in public accommodation establishments (Tables 14 and 15).

Table 14
Private accommodation capacity by tourist region, as of 31 July 2002

	Private rooms in	cities and resorts	Private roor	ms in rural areas	Private accom	modation total
Region	Hosts	Beds	Hosts	Beds	Hosts	Beds
Lake Balaton	29,443	159,375	1,828	9,936	31,271	169,311
Budapest and the Central						
Danube Region	1,022	4,004	452	2,481	1,474	6,485
Of which: Budapest	792	2,730			792	2,730
Southern Great Plain	632	3,308	273	1,551	905	4,859
Southern Transdanubia	3,064	12,435	569	2,949	3,633	15,384
Northern Great Plain	1,630	10,378	217	1,348	1,847	11,726
Northern Hungary	818	4,601	1,168	7,366	1,986	11,967
Central Transdanubia	874	4,425	391	2,163	1,265	6,588
Western Transdanubia	865	4,022	1,322	7,207	2,187	11,229
Lake Tisza	169	900	586	3,739	755	4,639
Country total	38,517	203,448	6,806	38,740	45,323	242,188



Table 15 Guest nights in private accommodation by tourist region, 2002

	Foreign	Hungarian	Total		Hungaria	
Region		guests			est night	S
			'00	0s		
Private rooms in o	cities an	d resorts				
Lake Balaton	203	106	310	1303	482	1786
Budapest and						
the Central Danube						
Region	13	24	37	68	128	196
Of which: Budapest	10	10	19	54	58	112
Southern Great Plain	2	16	17	9	72	81
Southern						
Transdanubia	14	14	28	112	74	187
Northern Great Plain	24	30	54	100	133	233
Northern Hungary	5	14	20	25	65	90
Central Transdanubia	3	10	13	47	73	120
Western Transdanubia	15	16	31	85	101	186
Lake Tisza	1	3	4	3	32	34
Country total	280	233	513	1,752	1,161	2,913
,				-,	.,	_,
Private rooms in I	ural are	as				
Lake Balaton	8	6	14	51	34	85
Budapest and the						
Central Danube						
Region	2	7	9	6	28	34
Southern Great Plain	1	3	4	5	14	19
Southern Transdanubia	1 2	7	9	11	31	42
Northern Great Plain	1	4	5	2	17	19
Northern Hungary	2	22	24	10	85	96
Central Transdanubia	2	8	10	8	41	50
Western Transdanubia	20	14	34	109	57	166
Lake Tisza	1	12	13	13	52	65
Country total	40	82	122	215	360	576
Private accommo						
Lake Balaton	211	113	324	1354	516	1871
Budapest and the						
Central Danube						
Region	14	31	45	74	156	230
Of which: Budapest	10	10	19	54	58	112
Southern Great Plain	3	18	21	14	86	100
Southern Transdanubia	ı 16	22	37	123	105	229
Northern Great Plain	25	34	59	102	150	252
Northern Hungary	8	36	44	36	150	186
Central Transdanubia	5	17	23	55	115	170
Western Transdanubia	35	30	65	194	159	352
Lake Tisza	2	14	17	15	84	99
Country total	320	315	635	1967	1522	3489
		Sourc	e: Huno	arian Cent	ral Statistic	cal Office



Organised tourism in Hungary

In 2002, unlike in the previous year, Hungarian tour operators marketed more outbound trips for Hungarians than the volume of inbound tourism, and the guest nights that these Hungarians spent abroad was substantially higher than the nights that the foreigners spent in Hungary. Of the three activities of Hungarian tour operators, the number of domestic travellers rose, though the volume of overnight stays decreased, whereas in the area of inbound and outbound tourism the number of tourists as well as that of the nights increased in 2002 (Table 16).

Table 16
Turnover of tour operators and travel agencies

rumover of tour operators and traver agencies									
	Inbound	tourism	Outb tour	ound rism	Domestic tourism				
	2001	2002	2001	2002	2001	2002			
			'00	00s					
Number of participants (tourists and same-day									
visitors)	587	583	566	603	340	521			
of which: tourists	533	553	534	576	144	177			
Guest nights	1,961	2,043	3,638	3,872	597	526			
Average length of stay	3.7	3.7	6.8	6.7	4.1	3.0			
			előző év	= 100,0					
Number of participants (tourists and same-day									
visitors)	92.1	99.3	91.5	106.4	139.3	153.3			
of which: tourists	94.3	103.8	89.5	107.7	90.6	122.8			
Guest nights	94.1	104.2	89.7	106.4	84.3	88.1			
Average length of stay	99.7	100.3	100.3	98.8	91.1	73.2			