» Research Department of the Hungarian Tourism Plc.

Main Indicators of Hungarian Tourism, 2007-2012

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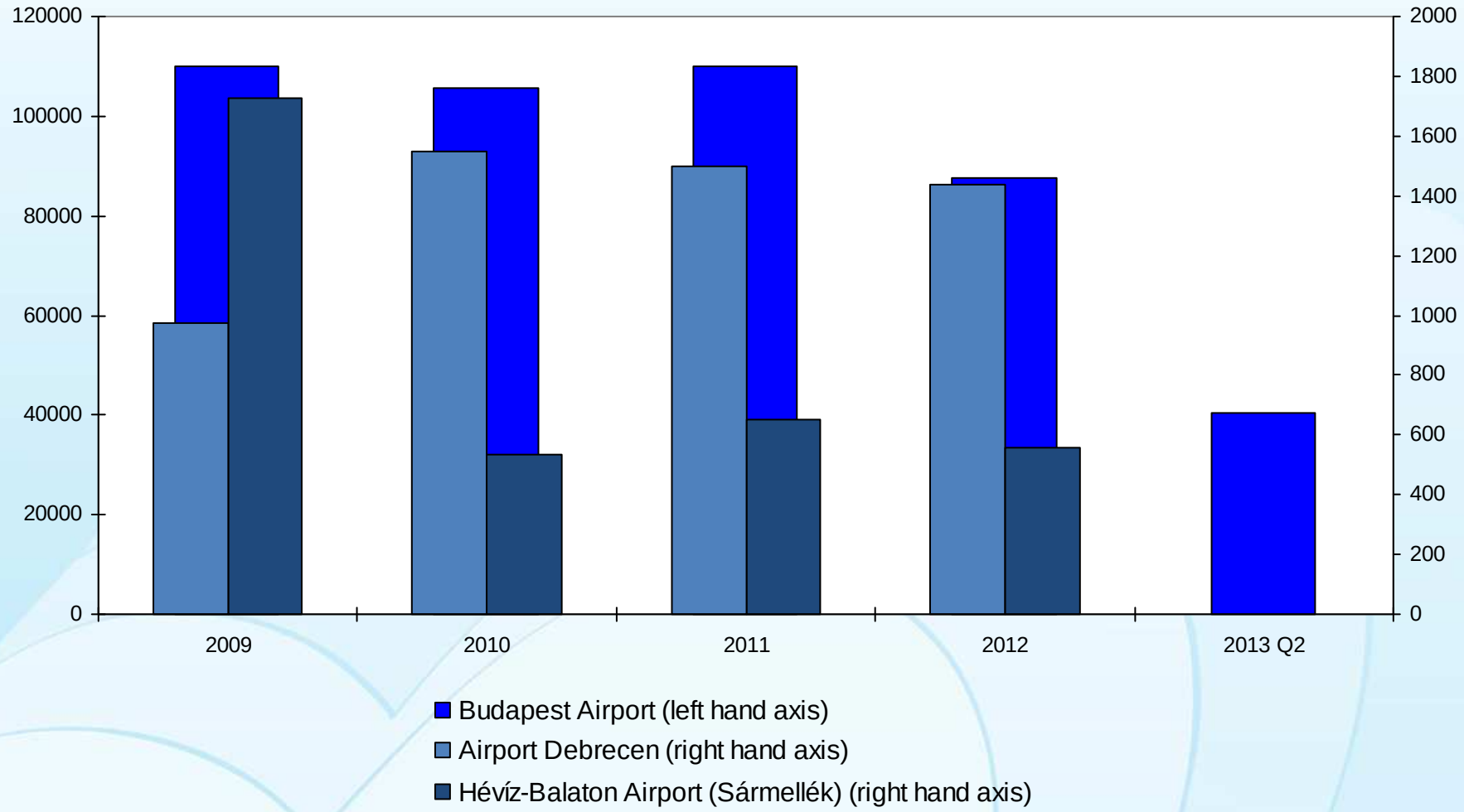
Traffic of Hungarian International Airports
Number of Arriving and Departing Flights
2009-2013 Q1-Q2



Source: Hungarian Central Statistical Office (HCSO)

Commercial and non-commercial flights

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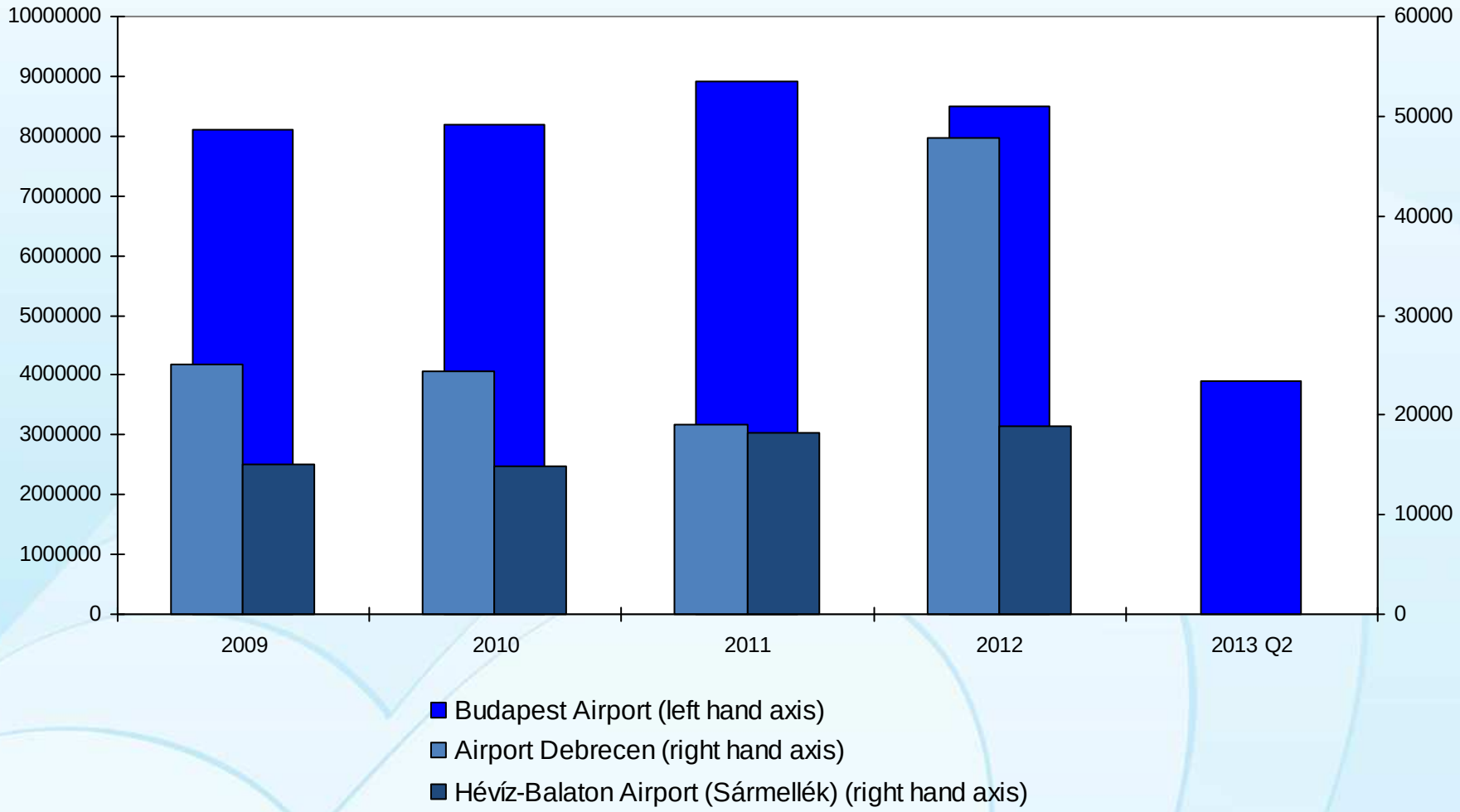
Traffic of Hungarian International Airports
Number of Arriving and Departing Travellers
2009-2013 Q1-Q2



Source: Hungarian Central Statistical Office (HCSO)

Commercial and non-commercial flights

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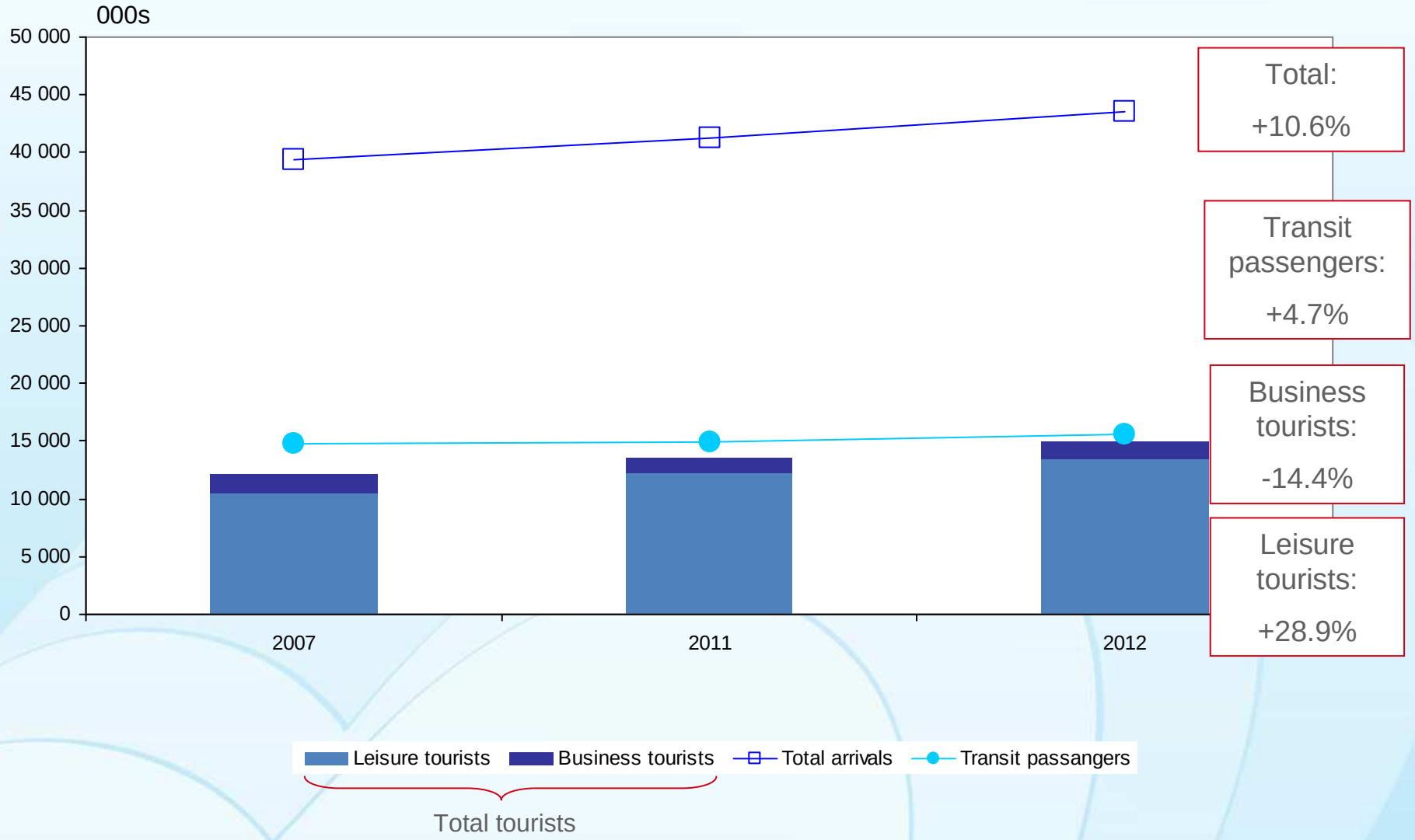
Visitor Arrivals to Hungary

2007, 2011, 2012

2012/2007



Source: Hungarian Central Statistical Office (HCSO), international visitor survey.

For methodological notes please check out the annex.

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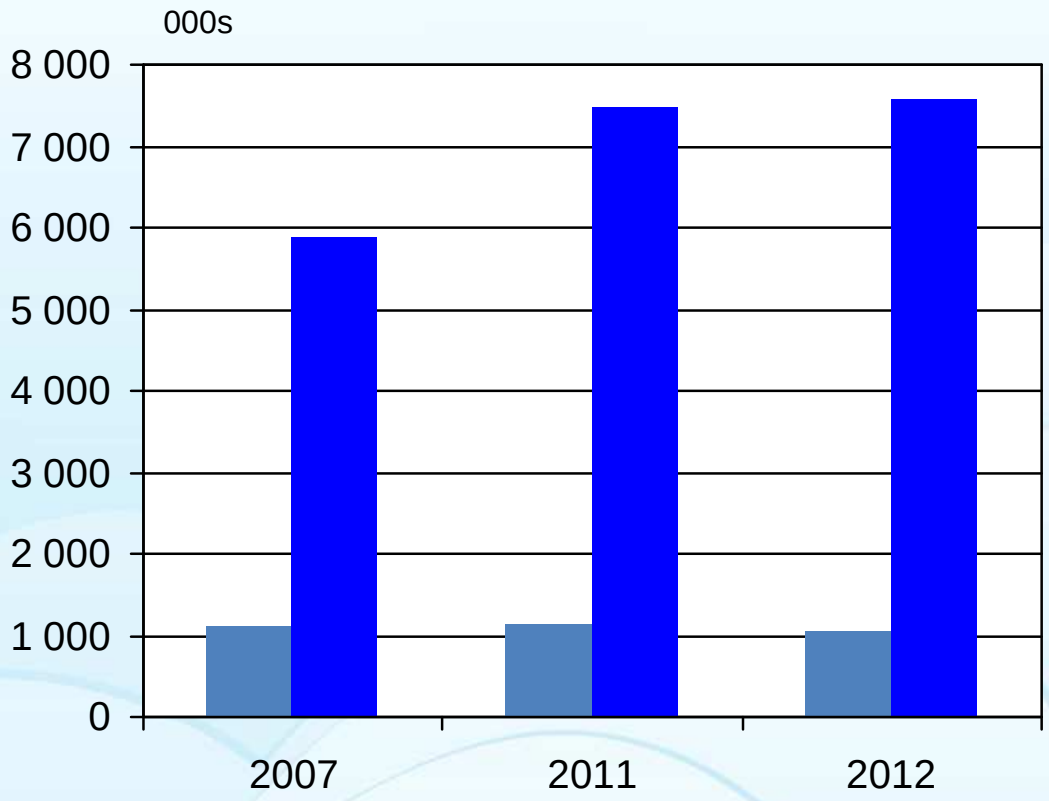
Leisure and Business Tourist Arrivals to Hungary

2007, 2011, 2012

2012/2007



-6.4%

+28.4%

MALÉV stopped operating

Recovery from international crisis delayed

YEL TÖBB LESZEL

Source: HCSO, international visitor survey.

For methodological notes please check out the annex.

Expenditure of Foreign Visitors

2007, 2011, 2012

	Total visitors	Transit passengers	Tourists
	Mn USD		
2007	5064.5	292.1	3477.7
2011	5972.4	475.8	4216.7
2012	5214.1	435.7	3590.1
2012/2007 USD	**+3.0%**	**+49.2%**	**+3.2%**
2012/2007 HUF	**+26.2%**	**+82.8%**	**+26.6%**

Source: Estimate based on HCSO, international visitor survey. Exchange rate: official yearly average exchange rate of MNB, the central bank of Hungary

For methodological notes please check out the annex.

Expenditure of Leisure and Business Overnight Tourists

2007, 2011, 2012

	Total tourists	Leisure tourists	Business tourists
	Mn USD		
2007	3784.5	2480.6	739.8
2011	4386.4	3329.8	655.4
2012	3705.9	2823.8	517.4
2012/2007 USD	**-2.1%**	**+13.8%**	**-30.1%**
2012/2007 HUF	**+20.1%**	**+39.6%**	**-14.3%**

Source: Estimate based on HCSO, international visitor survey. Exchange rate: official yearly average exchange rate of MNB, the central bank of Hungary

For methodological notes please check out the annex.

MALÉV stopped operating

Recovery from international crisis delayed

Main Indicators of Tourists Arriving by Air

2011, 2012

Total	2011	% of total tourists	2012	% of total tourists	2012/2011
Arrivals (000s)	3.4	24.6%	3.1	21.1%	-6.5%
Length of stay (million days)	21.3	35.8%	20.6	34.0%	-3.5%
Expenditure (Mn USD)	2156.9	51.2%	1828.5	50.9%	-15.2%
Leisure	**2011**	**% of total leisure tourists**	**2012**	**% of total leisure tourists**	**2012/2011**
Arrivals (000s)	2.7	21.8%	2.4	18.1%	-7.9%
Length of stay (million days)	17.9	32.8%	17.3	30.9%	-3.8%
Expenditure (Mn USD)	1669.2	47.0%	1423.4	46.6%	-14.7%
Business	**2011**	**% of total business tourists**	**2012**	**% of total business tourists**	**2012/2011**
Arrivals (000s)	0.7	49.2%	0.7	49.7%	-1.2%
Length of stay (million days)	3.4	67.9%	3.3	70.5%	-2.2%
Expenditure (Mn USD)	487.7	72.9%	405.1	76.2%	-16.9%

Tourists arriving by air: high spenders

Source: Estimate based on HCSO, international visitor survey.
Exchange rate: official yearly average exchange rate of MNB, the central bank of Hungary

For methodological notes please check out the annex.

Main Source Markets of Tourists Arriving by Air – Continents

2011, 2012

Role of LCCs increased

2011				2012				2012/2011	
	Continent	Tourist arrivals (000s)	Expenditure Mn USD		Continent	Tourist arrivals (000s)	Expenditure Mn USD	Tourist arrivals	Expenditure
1.	Europe	2 464	1405.9	1.	Europe	2 247	1095.5	-8.8%	-22.1%
2.	America	513	473.3	2.	America	509	457.9	-0.8%	-3.3%
3.	Asia	288	195.6	3.	Asia	292	199.2	+1.4%	+1.9%
4.	Australia	67	66.7	4.	Australia	66	61.7	-0.9%	-7.5%
5.	Africa	19	14.4	5.	Africa	21	14.2	+11.8%	-1.6%

Ranked by number of arrivals.

New segment seem to appear within Asian tourism flows

Source: Estimate based on HCSO, international visitor survey.
Exchange rate: official yearly average exchange rate of MNB, the central bank of Hungary

For methodological notes please check out the annex.

Top 10 Source Markets of Tourists Arriving by Air

2011, 2012 – Ranked by number of arrivals

Large volume with low expenditure.

2011				2012				2012/2011	
	Country	Tourist Arrivals (000s)	Expenditure (Mn USD)		Country	Tourist arrivals (000s)	Expenditure (Mn USD)	Tourist arrivals	Expenditure
1.	Germany	391	216.5	1.	Germany	371	181.5	-5.1%	-16.2%
2.	USA	359	315.0	2.	USA	352	328.3	-1.9%	+4.2%
3.	United Kingdom	308	171.2	3.	United Kingdom	281	158.8	-8.8%	-7.2%
4.	Portugal-Spain*	231	141.3	4.	Portugal-Spain*	179	83.4	-22.5%	-41.0%
5.	France	191	106.0	5.	France	179	92.3	-6.3%	-12.9%
6.	Italy	156	78.6	6.	Italy	151	61.2	-3.2%	-22.1%
7.	Romania	147	53.7	7.	Romania	144	42.2	-2.0%	-21.6%
8.	Sweden	137	77.6	8.	Sweden	123	57.7	-10.2%	-25.7%
9.	Israel	98	57.2	9.	Canada	90	75.0	+3.4%	-18.5%
10.	Netherlands	90	49.8	10.	Israel	86	51.5	-12.2%	-10.1%

* Summary data is published due to the insufficient number of replies.

Source: Estimate based on HCSO, international visitor survey.
Exchange rate: official yearly average exchange rate of MNB, the central bank of Hungary

For methodological notes please check out the annex.

Top 10 Source Markets of Tourists Arriving by Air

2011, 2012 – Ranked by expenditure

Signs of slow recovery from crisis (Greece) & new flights (Baltic countries)

2011			2012			2012/2011
	Country	Expenditure (Mn USD)		Country	Expenditure (Mn USD)	Expenditure
1.	USA	315.0	1.	USA	328.3	+4.2%
2.	Germany	216.5	2.	Germany	181.5	-16.2%
3.	United Kingdom	171.2	3.	United Kingdom	158.8	-7.2%
4.	Portugal-Spain*	141.3	4.	France	92.3	-12.9%
5.	France	106.0	5.	Portugal-Spain*	83.4	-41.0%
6.	Canada	103.0	6.	Canada	75.0	-27.2%
7.	Italy	78.6	7.	Italy	61.2	-22.1%
8.	Sweden	77.6	8.	Sweden	57.7	-25.7%
9.	Greece	61.7	9.	Israel	51.5	-10.1%
10.	Israel	57.2	10.	Estonia-Latvia-Lithuania-Ciprus-Malta*	44.8	12.9%

* Summary data is published due to the insufficient number of replies.

Source: Estimate based on HCSO, international visitor survey. Exchange rate: official yearly average exchange rate of MNB, the central bank of Hungary

For methodological notes please check out the annex.

Main Indicators of Source Markets of Tourists - Continents

2012 – Ranked by total number of tourists arriving by air in 2012

Continent	Total number of visitors (000s)	Total number of tourists (000s)	Share of leisure tourists (in number of tourists) (%)	Share of overnight tourists (in number of tourists) (%)	Total expenditure of tourists (Mn USD)	Total length of stay of tourists (000 days)
Europe	42 502.0	13 911.3	91.4	55.2	2 844	53 032
America	577.1	5445.0	82.9	100.0	467	4 360
Asia	390.1	333.6	72.6	88.6	202	2 531
Australia	68.7	67.3	93,6	100.0	62	530
Africa	26.4	21.7	71.8	99.6	14	172
Total	**43 565.2**	**14 878.8**	**90.7**	**57.9**	3 590	**60 625**

Source: Estimate based on HCSO, international visitor survey. Exchange rate: official yearly average exchange rate of MNB, the central bank of Hungary

For methodological notes please check out the annex.

Main Indicators of Top 10 Source Markets of Tourists - Countries

2012 – Ranked by total number of tourists arriving by air in 2012

Country	Total number of visitors (000s)	Total number of tourists (000s)	Share of leisure tourists (in number of tourists) (%)	Share of overnight tourists (in number of tourists) (%)	Total expenditure of tourists (Mn USD)	Total length of stay of tourists (000 days)
United Kingdom	357.4	292.9	84.1	99.1	163.1	1 763
France	346.2	245.3	82.2	99.9	115.0	1 469
Israel	94.3	86.5	78.5	99.8	51.6	666
Canada	94.8	91.9	81.0	100.0	76.0	963
Germany	3 188.4	2 230.5	87.6	98.7	848.0	16 540
Italy	577.3	353.6	93.2	99.2	126.1	2 688
Portugal-Spain*	225.3	193.3	90.7	96.9	87.2	1 049
Romania	7 901.1	1 178.8	93.9	50.2	97.4	3 144
Sweden	171.1	141.2	88.1	100.0	65.1	960
USA	411.8	386.1	82.2	100.0	336.8	2 996
Total	**43 565. 2**	**14 878.8**	**90.7**	**57.9**	3 590.2	**60 625**

Top markets are defined by total number of ***tourists arriving by air*** in 2012.

* Summary data is published due to the insufficient number of replies.

Source: Estimate based on HCSO, international visitor survey. Exchange rate: official yearly average exchange rate of MNB, the central bank of Hungary

For methodological notes please check out the annex.

Top 3 Motivation of Tourists - Continents

2012 – Ranked by the total number of tourists arriving by air in 2012

Continent	1.		2.		3.	
	Motivation	Share	Motivation	Share	Motivation	Share
Europe	VFR	30.2%	citybreak	25.8%	health tourism	10.7%
America	citybreak	31.9%	VFR	29.0%	business tourism	17.1%
Asia	citybreak	35.5%	business tourism	27.4%	VFR	26.5%
Australia	citybreak	37.9%	VFR	25.6%	business tourism	6.4%
Africa	citybreak	32.2%	business tourism	28.2%	VFR	27.7%
Total	**VFR**	**30.1%**	**citybreak**	**26.3%**	**recreation**	**10.2%**

Health tourism: medical treatment and wellness.

Business tourism: conferences, congresses, business trips, exhibitions, fairs.

Citybreak: overseas tourists tend to visit more European cities during a trip.

Source: HCSO, international visitor survey.

For methodological notes please check out the annex.

Top 3 Motivation of Tourists from Top 10 Markets - Countries

2012 – Ranked by total number of tourist arriving by air in 2012

	1.		2.		3.	
Country	**Motivation**	**Share**	**Motivation**	**Share**	**Motivation**	**Share**
United Kingdom	citybreak	50.1%	VFR	17.5%	business tourism	15.9%
France	citybreak	45.9%	business tourism	17.8%	VFR	14.3%
Israel	citybreak	44.5%	business tourism	21.5%	VFR	19.6%
Canada	VFR	44.0%	citybreak	19.5%	business tourism	19.0%
Germany	VFR	26.6%	recreation	22.4%	health tourism	15.7%
Italy	VFR	44.4%	citybreak	24.1%	health tourism	8.2%
Portugal-Spain*	citybreak	61.7%	VFR	13.0%	business tourism	9.3%
Romania	VFR	72.6%	citybreak	6.3%	business tourism	6.1%
Sweden	citybreak	48.6%	VFR	25.5%	business tourism	11.9%
USA	citybreak	30.4%	VFR	27.6%	VFR	17.8%
Total	**VFR**	**30.1%**	**citybreak**	**26.3%**	**recreation**	**10.2%**

Top markets are defined by total number of ***tourists arriving by air*** in 2012.
Health tourism: medical treatment and wellness.
Business tourism: conferences, congresses, business trips, exhibitions, fairs.
Citybreak: overseas tourists tend to visit more European cities during a trip.

* Summary data is published due to the insufficient number of replies.
Source: HCSO, international visitor survey.
For methodological notes please check out the annex.

Top 3 Motivation of Overnight Tourists - Continens

2012 – Ranked by total number of tourists arriving by air in 2012

Continent	1.		2.		3.	
	Motivation	Share	Motivation	Share	Motivation	Share
Europe	VFR	30.5%	citybreak	18.4%	recreation	17.2%
America	citybreak	31.9%	VFR	29.0%	business tourism	17.1%
Asia	citybreak	37.3%	business tourism	31.0%	VFR	19.8%
Australia	citybreak	37.9%	VFR	25.6%	business tourism	6.4%
Africa	citybreak	32.4%	business tourism	27.9%	VFR	27.8%
Total	VFR	30.0%	citybreak	20.0%	recreation	15.9%

Health tourism: medical treatment and wellness.

Business tourism: conferences, congresses, business trips, exhibitions, fairs.

Citybreak: overseas tourists tend to visit more European cities during a trip.

Source: HCSO, international visitor survey.
For methodological notes please check out the annex.

Top3 Motivation of Overnights Tourists from Top 10 Markets - Countries

2012 – Ranked by total number of tourists arriving by air in 2012

Country	1.		2.		3.	
	Motivation	Share	Motivation	Share	Motivation	Share
United Kingdom	citybreak	49.8%	VFR	17.6%	business tourism	15.9%
France	citybreak	45.8%	business tourism	17.8%	VFR	14.3%
Israel	citybreak	44.6%	business tourism	21.5%	VFR	19.7%
Canada	VFR	44.0%	citybreak	19.5%	business tourism	19.0%
Germany	VFR	26.7%	recreation	22.7%	health tourism	15.9%
Italy	VFR	44.4%	citybreak	24.1%	health tourism	8.2%
Portugal-Spain*	citybreak	60.5%	VFR	13.4%	business tourism	9.6%
Romania	VFR	83.0%	business tourism	7.9%	citybreak	3.8%
Sweden	citybreak	48.6%	VFR	25.5%	business tourism	11.9%
USA	citybreak	30.4%	VFR	27.6%	VFR	17.8%
Total	VFR	30.0%	citybreak	20.0%	recreation	15.9%

Top markets are defined by total number of ***tourists arriving by air*** in 2012.
Health tourism: medical treatment and wellness.
Business tourism: conferences, congresses, business trips, exhibitions, fairs.
Citybreak: overseas tourists tend to visit more European cities during a trip.

* Summary data is published due to the insufficient number of replies.
Source: HCSO, international visitor survey.
For methodological notes please check out the annex.

Top 10 Source Markets: Tourist Arrivals by Air vs. Overnights at Public Accommodation Establishments

2012

Countries	Tourist arrivals by air (000s)	Countries	Overnights at public accommodation establishments (000s)
Germany	371	Germany	2 146
USA	352	Austria	804
United Kingdom	281	Italy	624
Portugal-Spain*	179	Russia	614
France	179	United Kingdom	608
Italy	151	Czech Republic	539
Romania	144	Poland	485
Sweden	123	Netherlands	460
Canada	90	USA	451
Israel	86	Romania	419

* Summary data is published due to the insufficient number of replies.

Different structure of demand at public accommodation establishments

Source: HCSO, international visitor survey & public accommodation statistics (final data published on 25.06.2013.).

For methodological notes please check out the annex.

Top 10 Source Markets: Arrivals & Overnights at Public Accommodation Establishments

2007, 2011, 2012

Weakening position of largest traditional markets

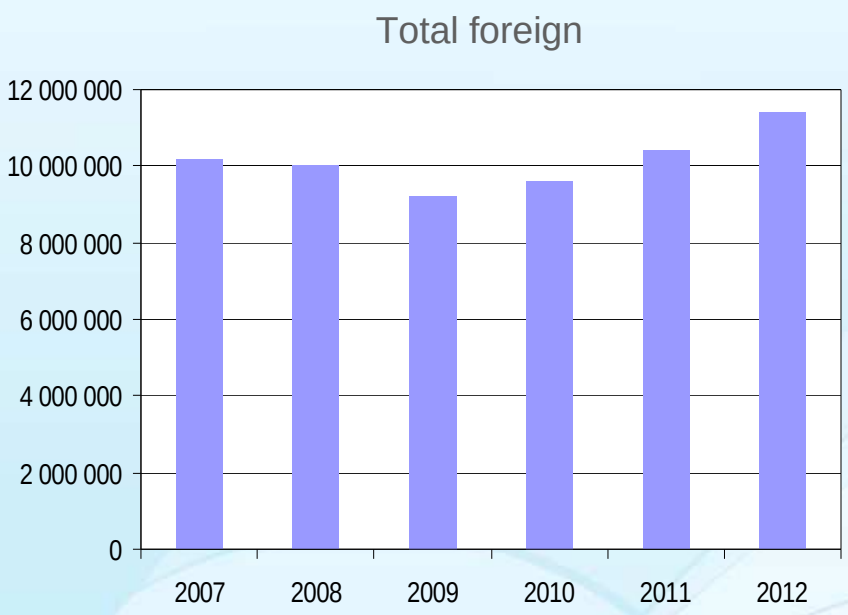
	2007		2011		2012	
Countries	**Arrivals**	**Overnights**	**Arrivals**	**Overnights**	**Arrivals**	**Overnights**
Germany	608 256	2 620 640	542 333	2 082 681	570 147	2 146 491
Austria	246 042	711 413	294 931	809 500	297 053	804 268
Italy	191 381	499 142	197 495	528 785	229 022	624 459
Russia	70 660	266 297	123 394	461 953	159 014	614 077
United Kingdom	234 077	620 218	221 425	538 970	241 519	608 112
Czech Republic	83 339	229 617	178 585	514 038	187 513	538 591
Poland	117 778	312 963	178 607	448 060	194 035	485 062
Netherlands	92 339	342 713	103 947	336 532	133 537	459 543
USA	198 431	533 895	177 981	449 934	175 745	450 573
Romania	200 681	352 652	216 164	415 493	217 631	419 030
Total foreign	**3 451 186**	**10 170 808**	**3 821 751**	**10 410 774**	**4 163 641**	**11 392 183**

Top markets are defined by total number of ***overnights at public accommodation establishments*** in 2012.

Source: HCSO, public accommodation statistics (final data published on 25.06.2013.).
For methodological notes please check out the annex.

Overnights at Public Accommodation Establishments

2007-2012



Conclusion: importance of emerging markets is increasing

Source: HCSO, public accommodation statistics (final data published on 25.06.2013.).

For methodological notes please check out the annex.

Top 6 Source Markets: Overnights at Public Accommodation Establishments

2007-2012

Recovery from crisis at different pace

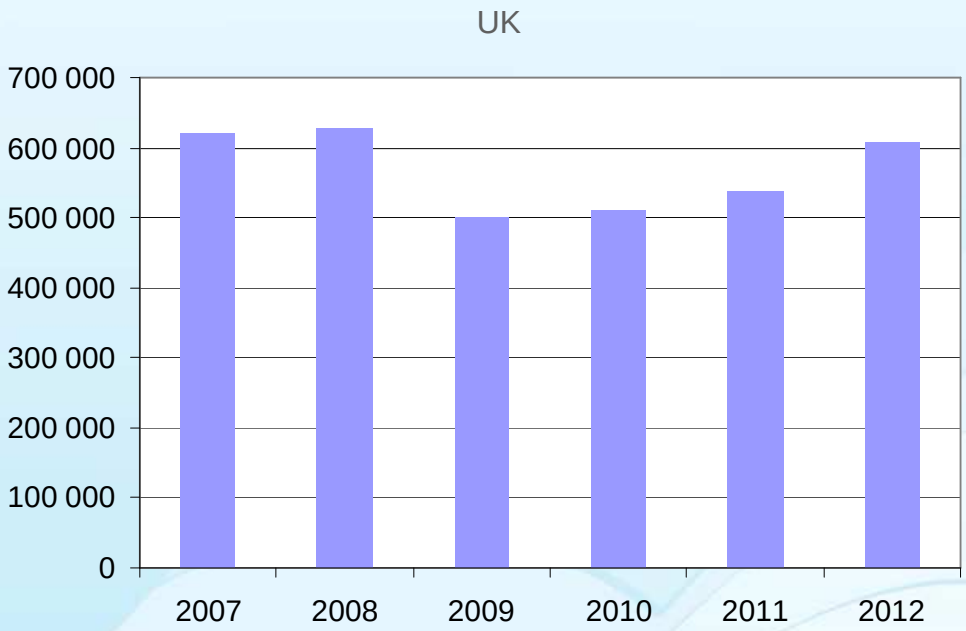
Top markets are defined by total number of ***tourist arriving by air*** in 2012.

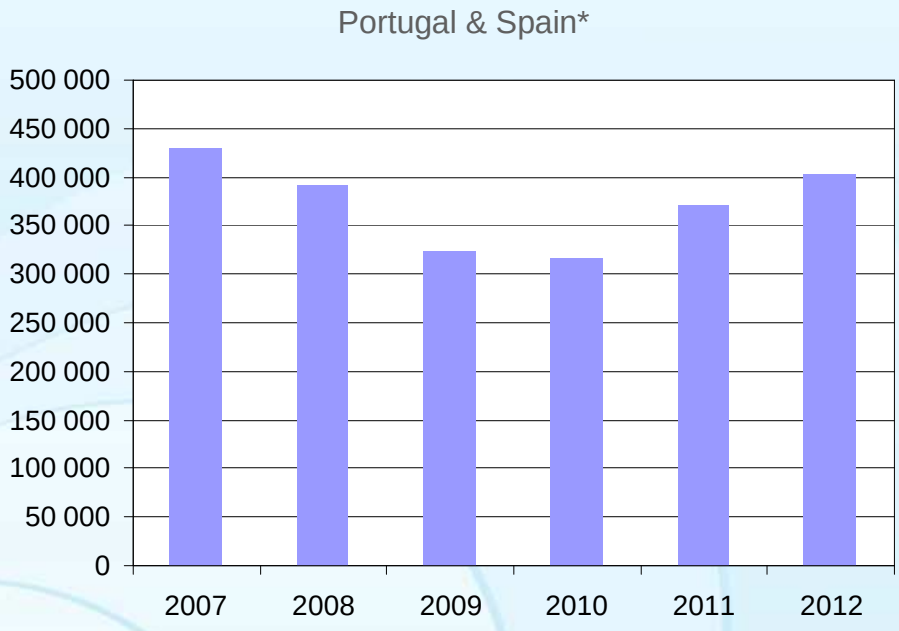
Source: HCSO, international visitor survey & public accommodation statistics (final data published on 25.06.2013.).

For methodological notes please check out the annex.

Top 6 Source Markets: Overnights at Public Accommodation Establishments

2007-2012





Recovery from crisis at different pace

* Summary data is published due to the insufficient number of replies.

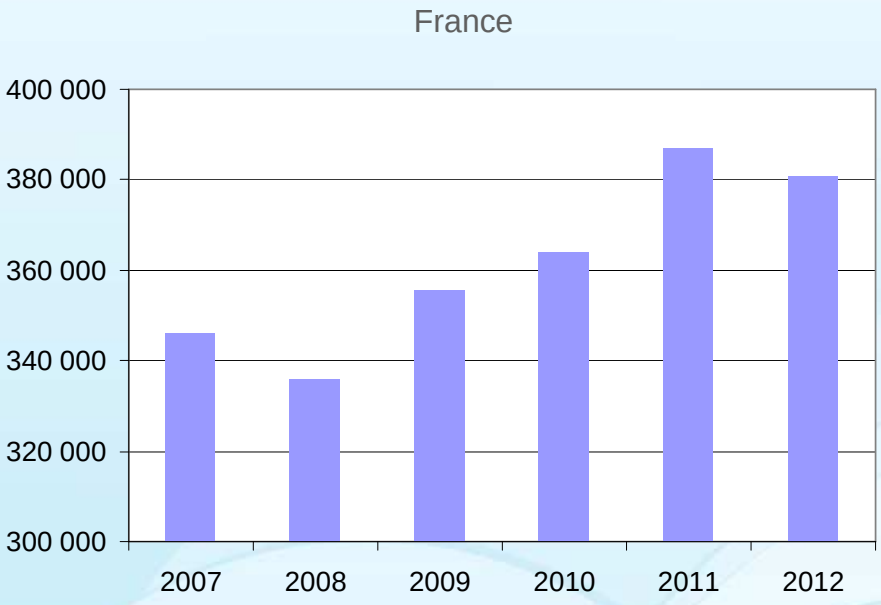
Top markets are defined by total number of ***tourist arriving by air*** in 2012.

Source: HCSO, international visitor survey & public accommodation statistics (final data published on 25.06.2013.).

For methodological notes please check out the annex.

Top 6 Source Markets: Overnights at Public Accommodation Establishments

2007-2012



Recovery from crisis at different pace

Top markets are defined by total number of ***tourist arriving by air*** in 2012.

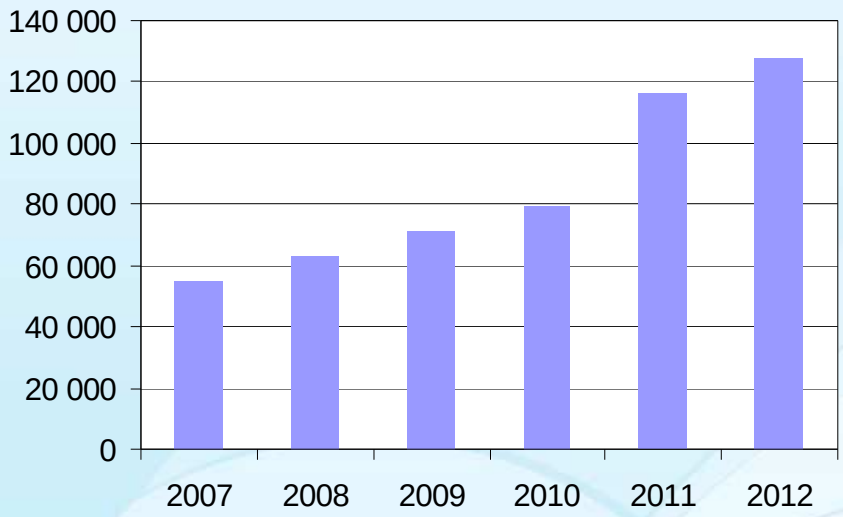
Source: HCSO, international visitor survey & public accommodation statistics (final data published on 25.06.2013.).

For methodological notes please check out the annex.

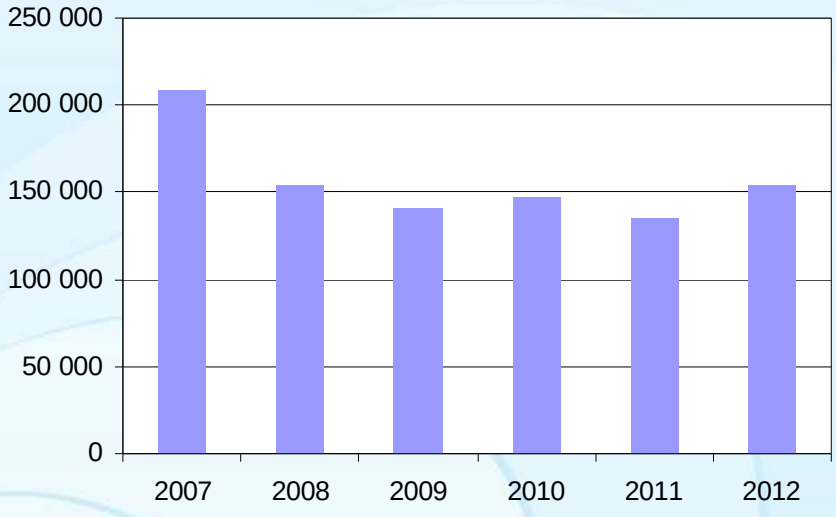
Overseas Source Markets: Overnights at Public Accommodation Establishments

2007-2012

China



Japan



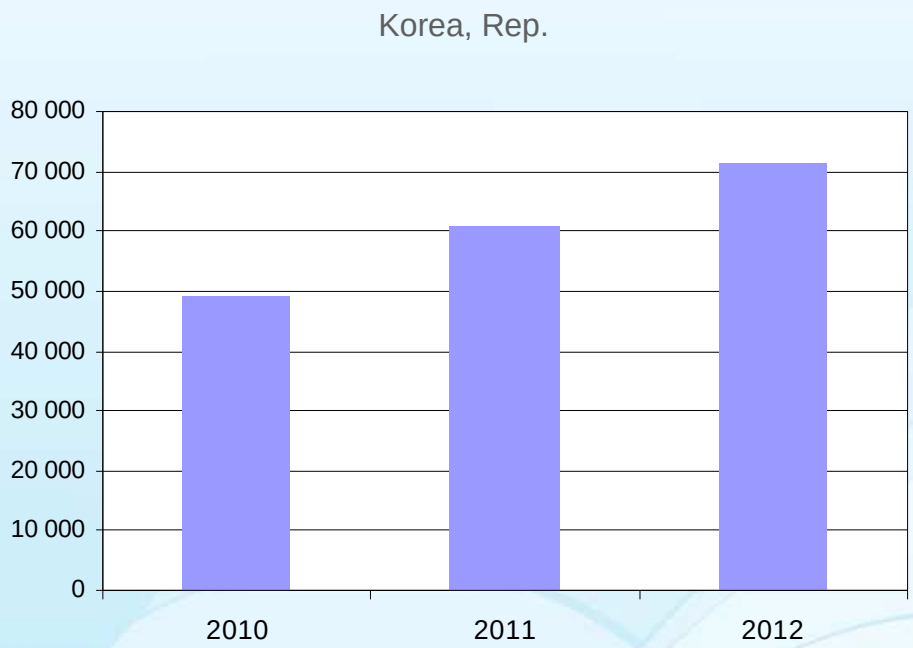
Recovery from crisis at different pace

Source: HCSO, international visitor survey & public accommodation statistics (final data published on 25.06.2013.)

For methodological notes please check out the annex.

Overseas Source Markets: Overnights at Public Accommodation Establishments

2007-2012



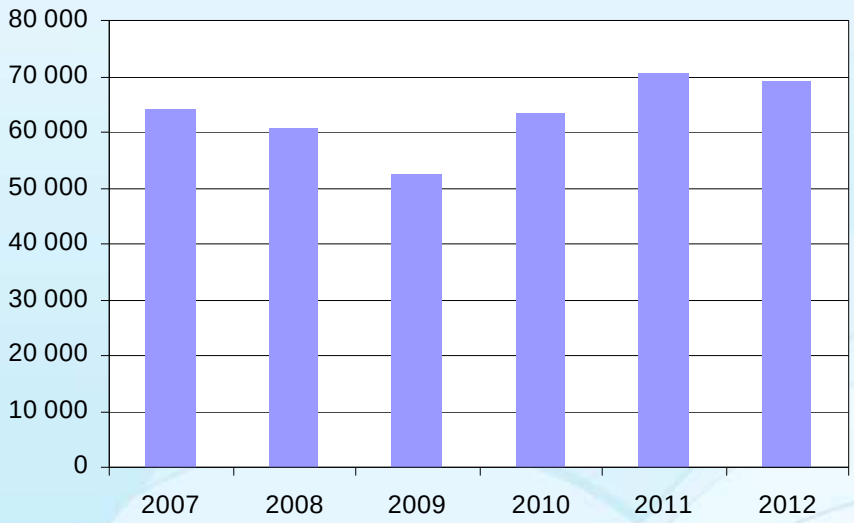
Recovery from crisis at different pace

Source: HCSO, international visitor survey & public accommodation statistics (final data published on 25.06.2013.)
Data collected for Korean Rep. since 2010.
For methodological notes please check out the annex.

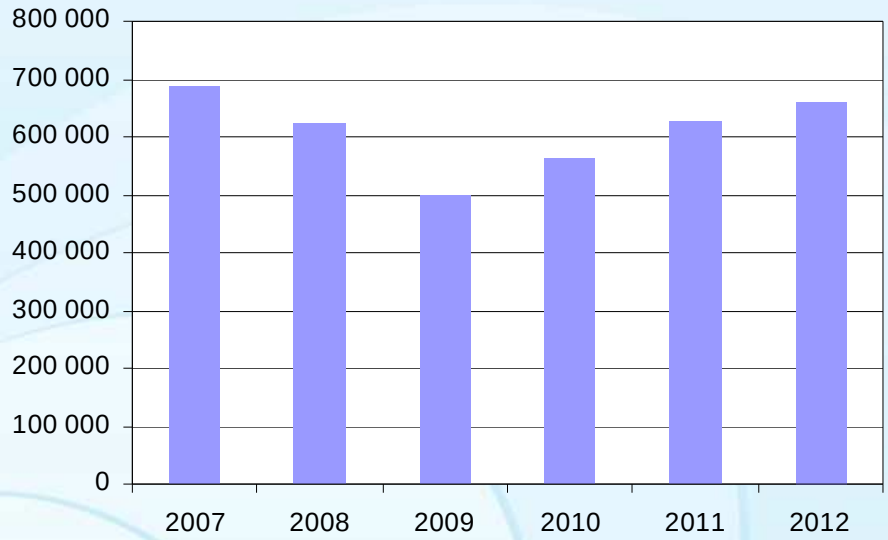
Overseas Source Markets: Overnights at Public Accommodation Establishments

2007-2012

Canada



Total America



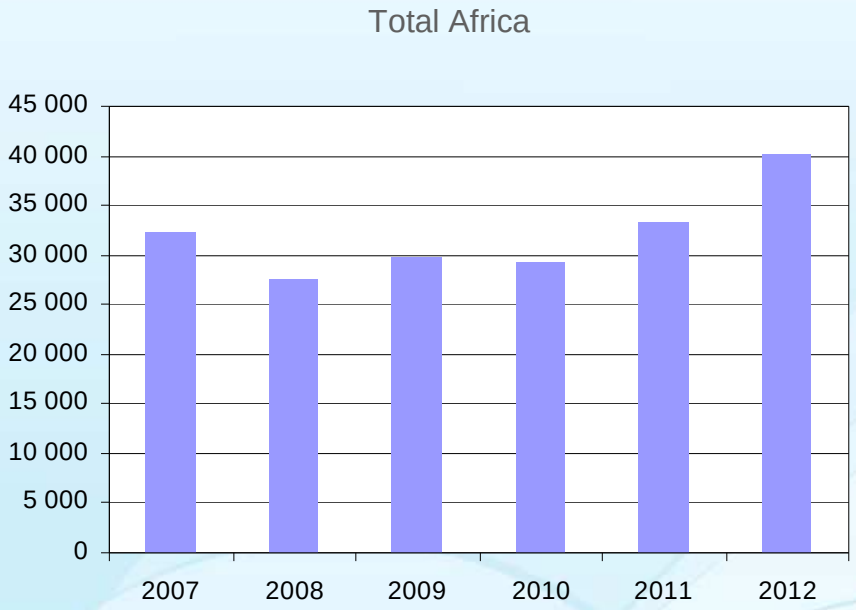
Recovery from crisis at different pace

Source: HCSO, international visitor survey & public accommodation statistics (final data published on 25.06.2013.)

For methodological notes please check out the annex.

Overseas Source Markets: Overnights at Public Accommodation Establishments

2007-2012



Recovery from crisis at different pace

Source: HCSO, international visitor survey & public accommodation statistics (final data published on 25.06.2013.)
For methodological notes please check out the annex.

Top 10 Source Markets: Arrivals & Overnights at Public Accommodation Establishments of BUDAPEST

2007, 2011, 2012

Strengthening position of new markets

	2007		2011		2012	
Countries	**Arrivals**	**Overnights**	**Arrivals**	**Overnights**	**Arrivals**	**Overnights**
Germany	234 067	588 350	234 707	571 097	252 324	625 779
Austria	72 222	141 636	85 584	163 702	92 609	181 843
Italy	140 438	389 100	154 499	426 900	186 743	528 179
Russia	47 302	156 782	86 906	264 587	108 470	329 148
United Kingdom	205 388	535 440	193 722	461 740	214 901	541 690
Czech Republic	29 070	55 136	47 241	105 083	50 835	111 984
Poland	46 937	95 280	81 758	163 341	93 017	188 660
Netherlands	44 970	115 738	63 590	163 634	89 847	256 876
USA	178 975	477 660	160 710	401 839	160 476	404 032
Romania	84 966	140 259	89 831	156 540	95 567	170 194
Total foreign	2 144 182	5 327 509	2 398 454	5 689 303	2 691 786	6 522 604

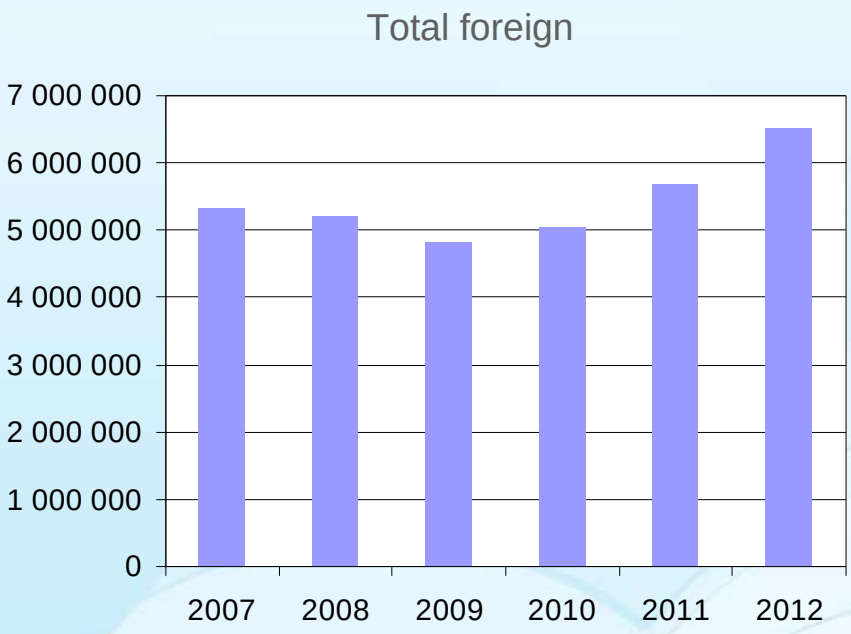
Top markets are defined by total number of ***overnights at Hungarian public accommodation establishments*** in 2012.

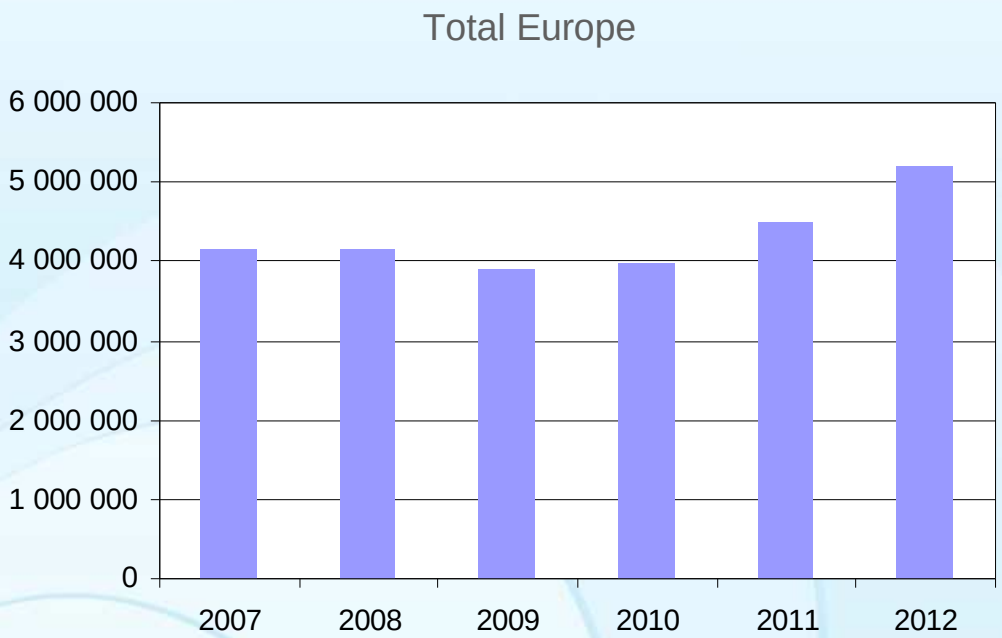
Source: HCSO, public accommodation statistics (final data for 2012 published on 25.06.2013.), TourMIS

For methodological notes please check out the annex.

Overnights at Public Accommodation Establishments of Budapest

2007-2012





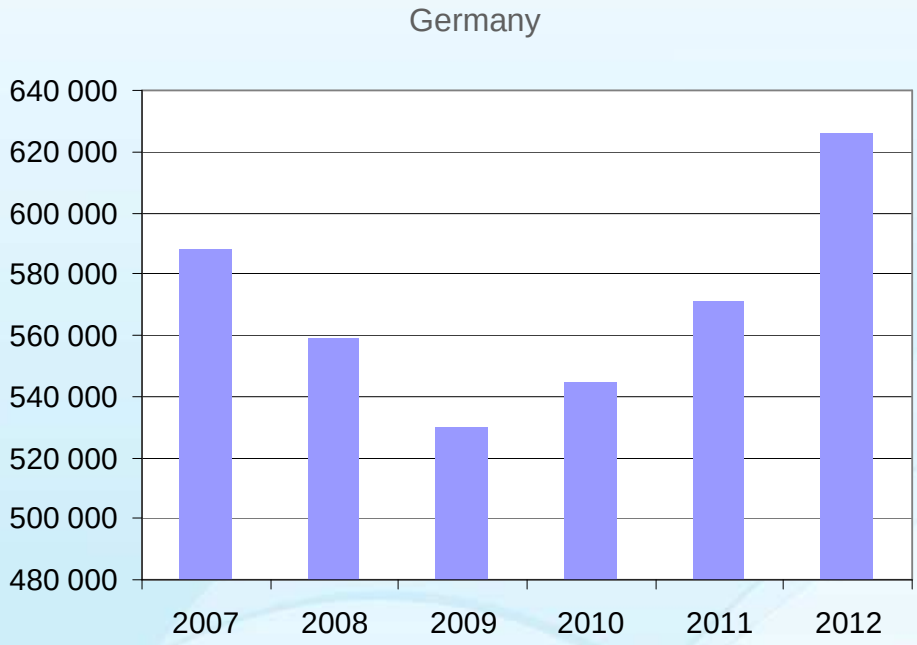
Conclusion: importance of emerging markets is increasing

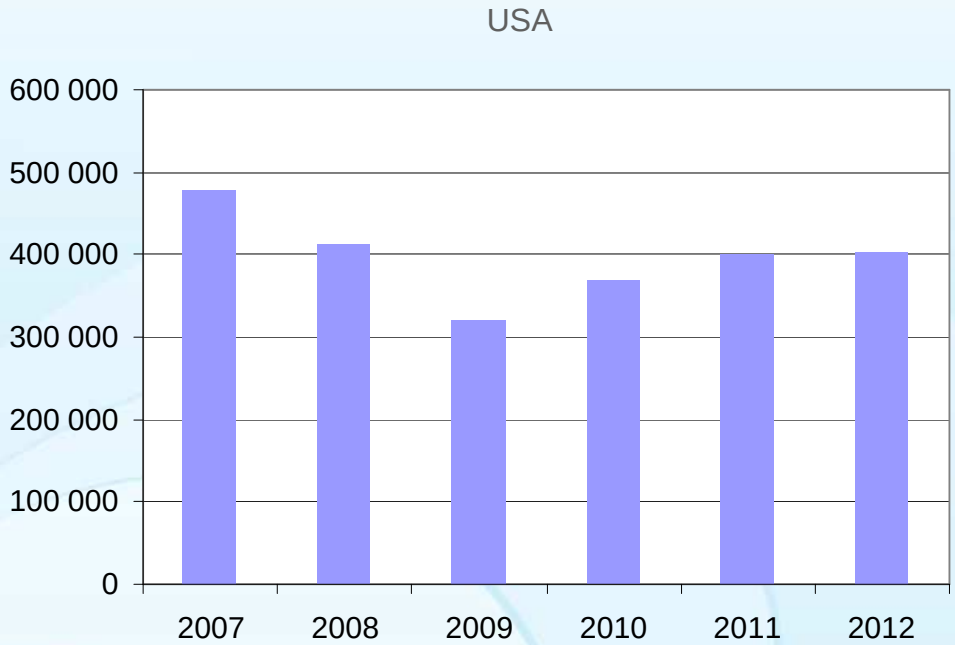
Source: HCSO, public accommodation statistics (preliminary data for 2010, final data for 2012 published on 25.06.2013.), TourMIS.

For methodological notes please check out the annex.

Top 6 Source Markets: Overnights at Public Accommodation Establishments of Budapest

2007-2012





Recovery from crisis at different pace

Top markets are defined by total number of ***tourist arriving by air*** in 2012.

Source: HCSO, public accommodation statistics (preliminary data for 2010, final data for 2012 published on 25.06.2013.), TourMIS.

For methodological notes please check out the annex.

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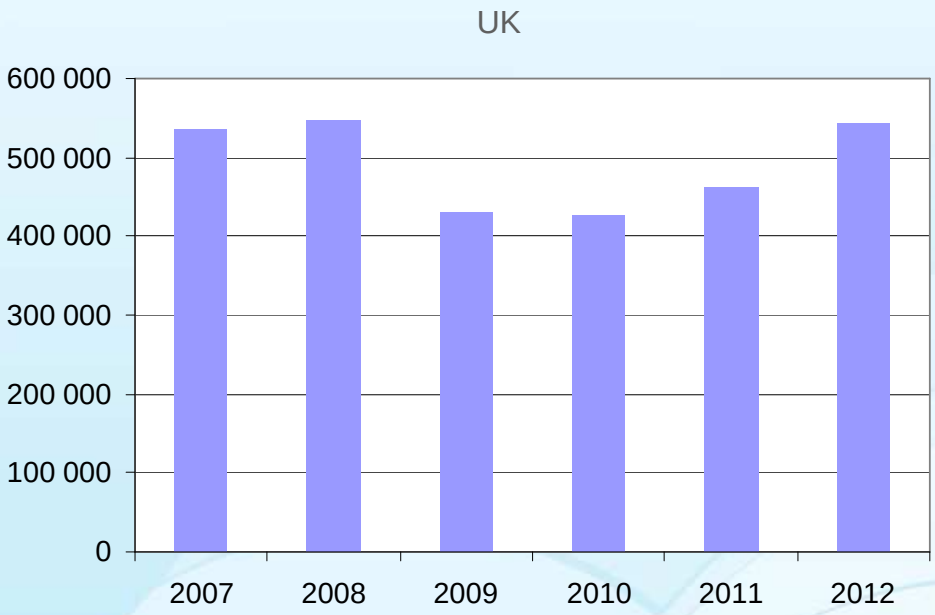
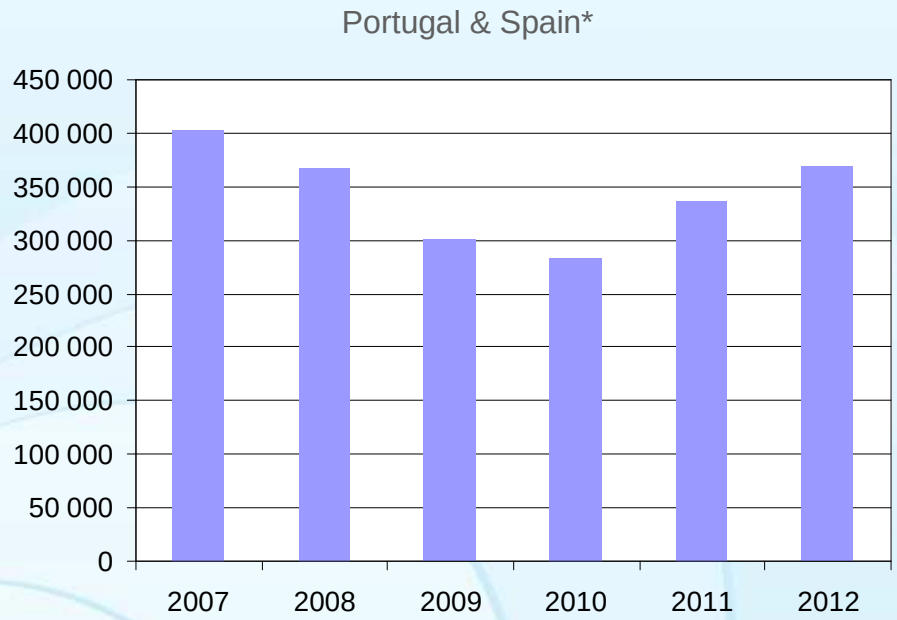
Top 6 Source Markets: Overnights at Public Accommodation Establishments of Budapest

2007-2012





Recovery from crisis at different pace

* Summary data is published due to the insufficient number of replies.

Top markets are defined by total number of ***tourist arriving by air*** in 2012.

Source: HCSO, public accommodation statistics (preliminary data for 2010, final data for 2012 published on 25.06.2013.), TourMIS.

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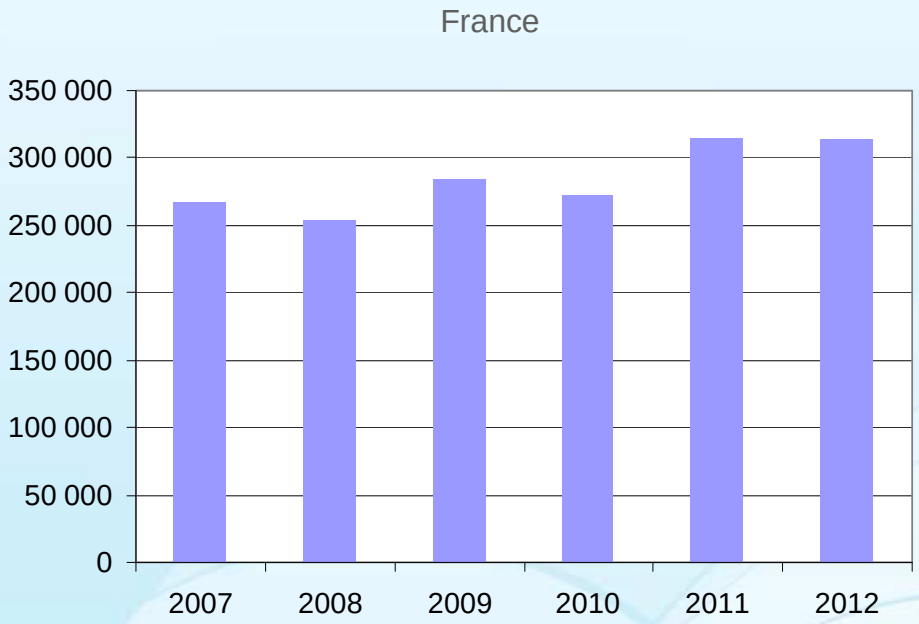
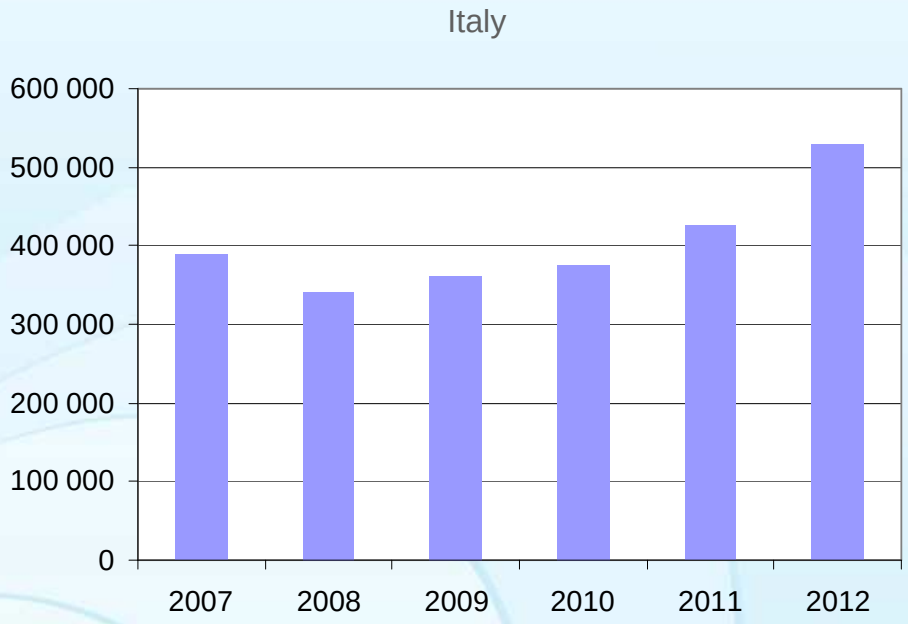
Top 6 Source Markets: Overnights at Public Accommodation Establishments of Budapest

2007-2012





Recovery from crisis at different pace

Top markets are defined by total number of ***tourist arriving by air*** in 2012.

Source: HCSO, public accommodation statistics (preliminary data for 2010, final data for 2012 published on 25.06.2013.), TourMIS.

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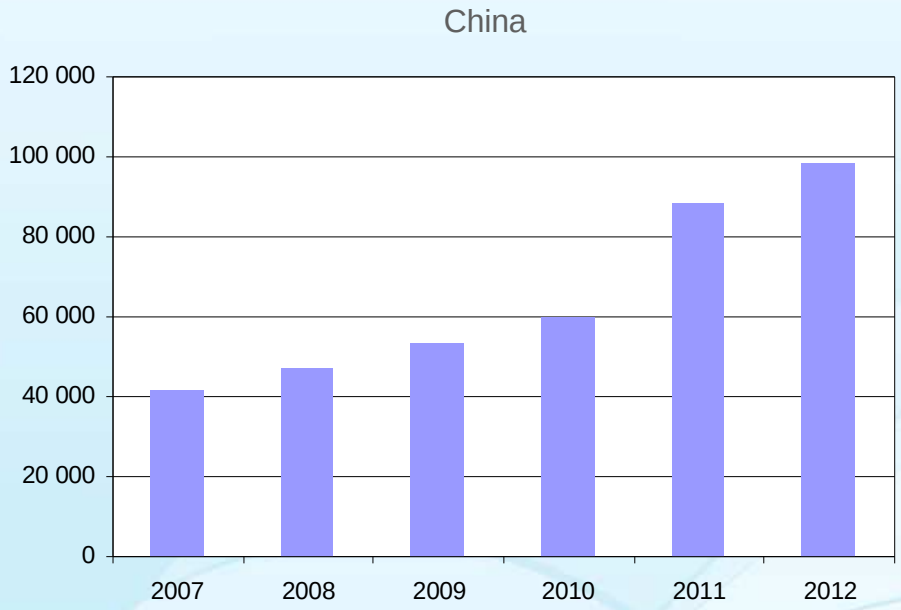
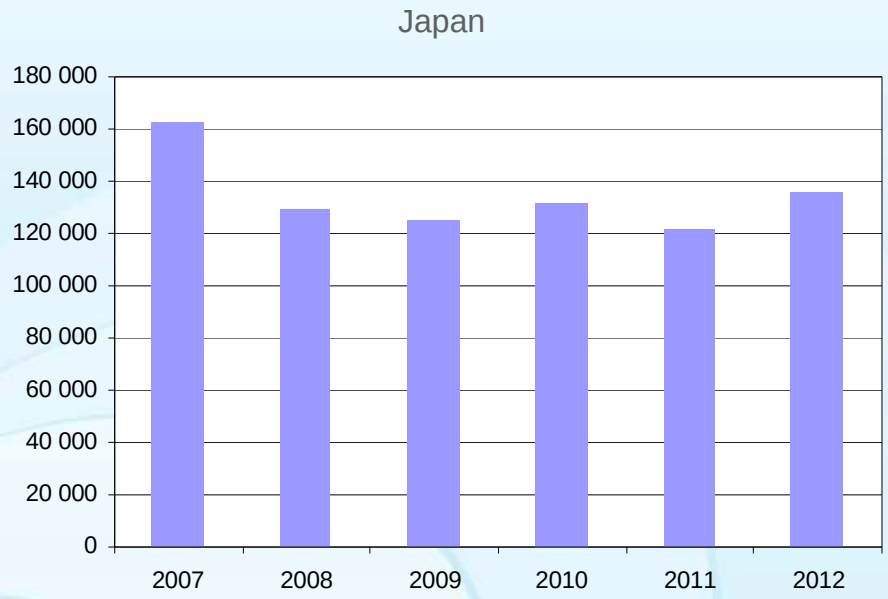
Overseas Source Markets: Overnights at Public Accommodation Establishments of Budapest

2007-2012





Recovery from crisis at different pace

Source: HCSO, public accommodation statistics (preliminary data for 2010, final data for 2012 published on 25.06.2013.), TourMIS.

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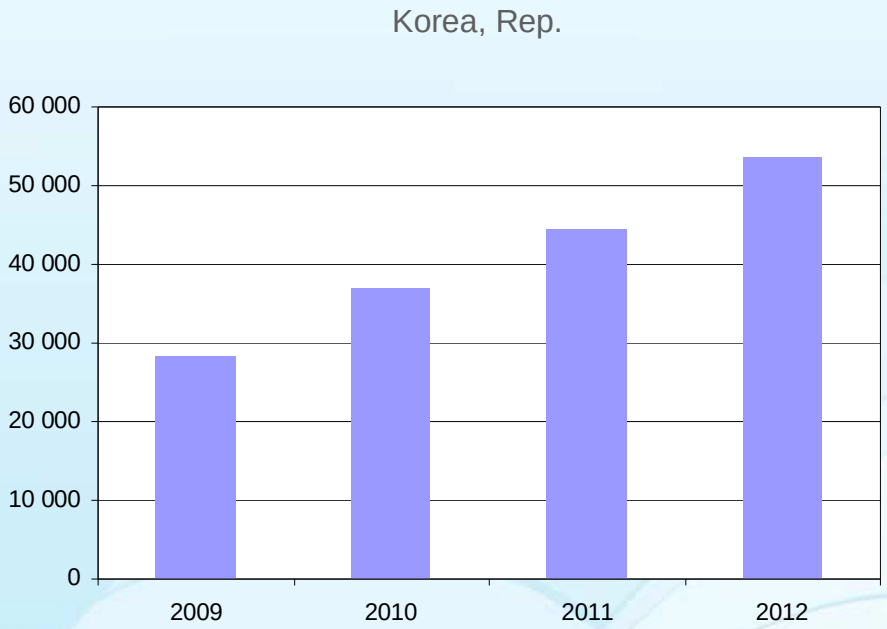
Overseas Source Markets: Overnights at Public Accommodation Establishments of Budapest

2007-2012



Recovery from crisis at different pace

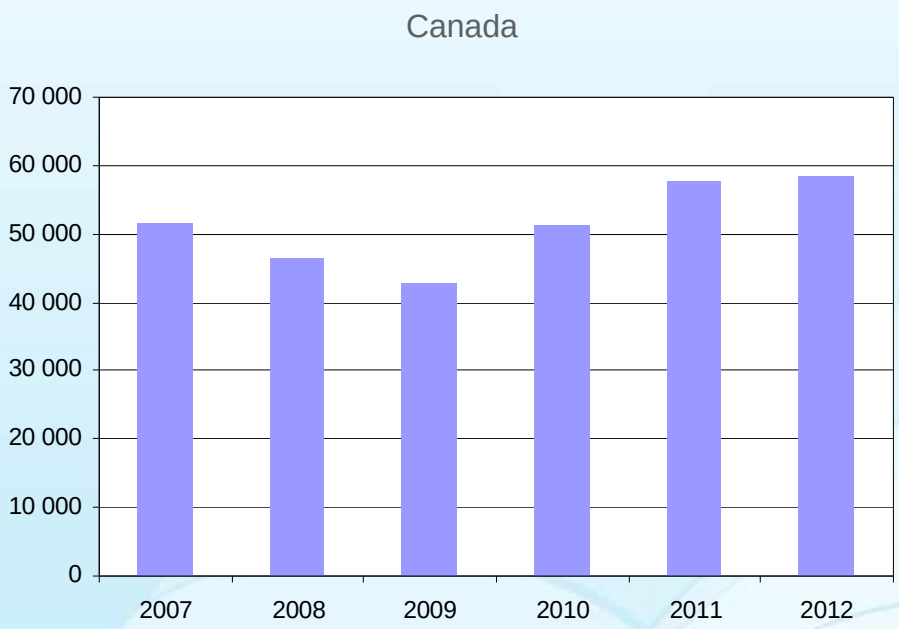
Source: HCSO, public accommodation statistics (preliminary data for 2010, final data for 2012 published on 25.06.2013.), TourMIS.

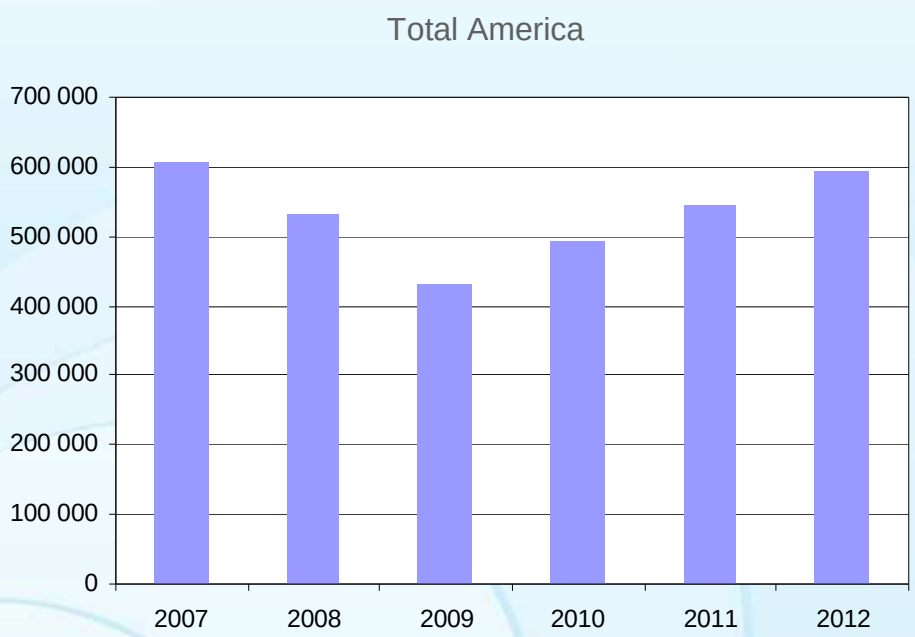
Data collected for Korean Rep. since 2009.

For methodological notes please check out the annex.

Overseas Source Markets: Overnights at Public Accommodation Establishments of Budapest

2007-2012





Recovery from crisis at different pace

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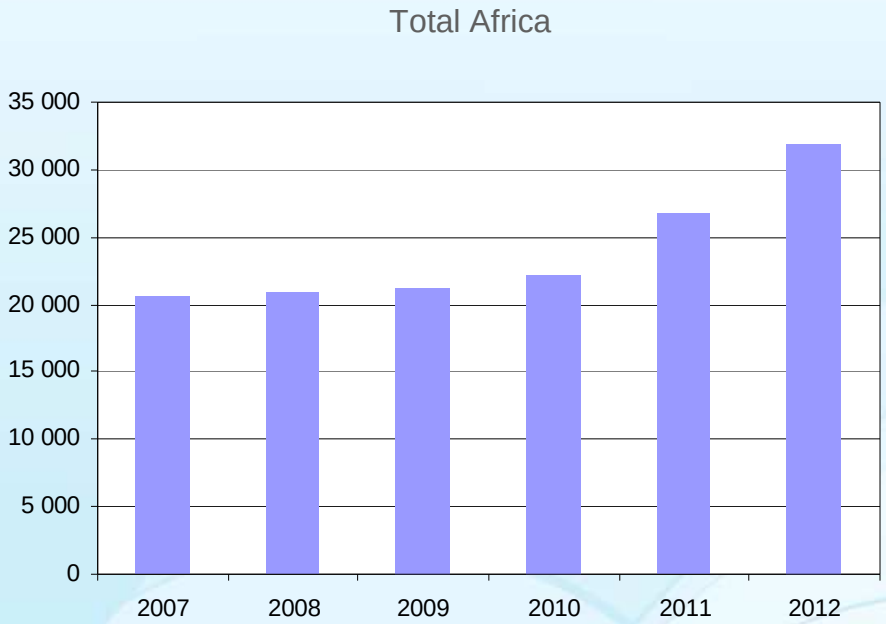
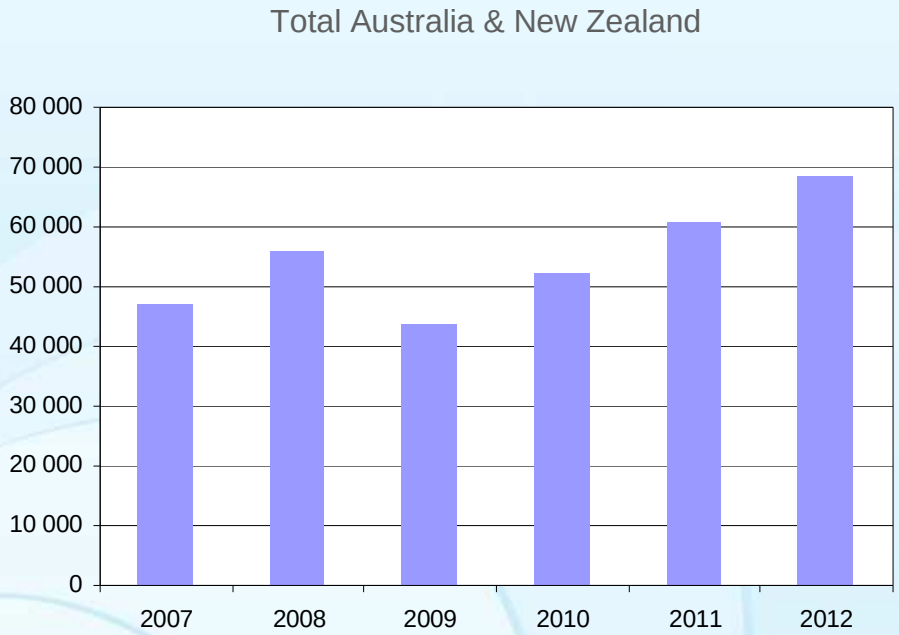
2007-2012





Recovery from crisis at different pace

Source: HCSO, public accommodation statistics (preliminary data for 2010, final data for 2012 published on 25.06.2013.), TourMIS.

For methodological notes please check out the annex.

Annex

- 2007 was a record year (and last year before the crisis) in Hungarian tourism, results of 2011 and 2012 outperformed even 2007 data.
- At the same time 2012 was a special year in Hungarian tourism as the national flag carrier MALÉV has stopped operation therefore it is less representative, it is worth to examine 2011 data also.
- The Hungarian Central Statistical Office (HCSO, http://www.ksh.hu/tourism_catering) has two main types of data collection:
  1) public accommodation establishments (hotels, boarding houses, bungalows, community hostels and camping sites) data (arrivals and overnights of guests, etc.);
  2) tourism demand surveys:
     a) international visitor survey (total arrivals, transit passengers, tourists; nights; expenditure; motivations in detail; transportation [road/air]; etc.),
     b) domestic tourism survey (number of overnight trips; nights; spending; motivations in detail; expenditure; etc.)
     c) survey of Hungarian travelling abroad (number of trips; nights; spending; motivations in detail; expenditure; etc.)
- Hungarian Tourism Plc. uses HCSO's officially published figures. For further information please get in touch with HCSO. Contact information can be provided when needed.

- Expenditure data is published in HUF by HCSO. Estimates for expenditure in USD were calculated by using the official yearly average exchange rate of MNB (the central bank of Hungary).
- Exchange rate 2007: 1 USD=183,83 HUF, 2011: 1 USD=200.94 HUF, 2012: 1 USD = 225,37 HUF

- Differences may be caused by rounding.
- Decimals are marked with „ . ".
- Billion: 1 000 000 000.
- The Hungarian Tourism Plc. does not take responsibility for business decisions made on the basis of the data provided.

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