

# Hungary

## Tourism in the economy and outlook for recovery

Tourism has been a driver of the Hungarian economy. In 2019, tourism directly contributed 6.8% to total GVA and 9.5% of the national workforce (421 036 jobs). The impact of COVID-19 has had a significant impact on the tourism sector, with preliminary estimates suggesting tourism GVA fell to HUF 2 194 billion or 5.4% of the national economy in 2020.

In 2019, there were 15.9 million international tourists in Hungary, and international expenditure accounted for 75% of total tourism expenditure. As a result of the pandemic, international tourists fell to 6.6 million (down 58.5%) in 2020 before rebounding to 6.9 million in 2021. The decline in tourists saw international receipts fall to HUF 1 738 billion in 2021 (down 41.6% compared to 2019).

Domestic tourism began to rebound in 2021. Domestic overnight tourists increased by 14.2% in 2021 but remained 28.5% under pre-pandemic levels.

## Tourism governance and funding

Overall responsibility for tourism is with the Minister leading the Cabinet Office of the Prime Minister. The Deputy Prime Minister is responsible for religious tourism, while the Minister for Agricultural Policy, in co-operation with the Minister for Tourism, is responsible for the development of rural tourism.

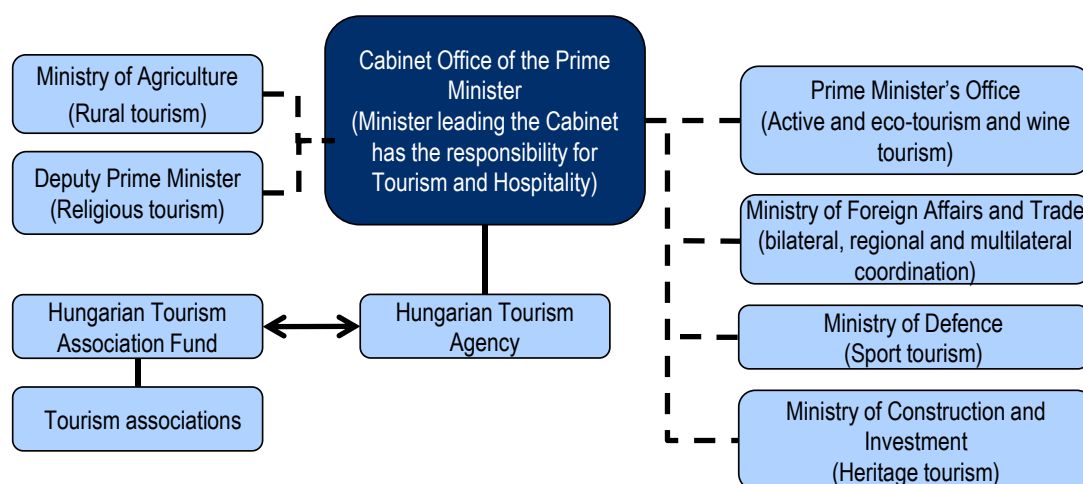
The Hungarian Tourism Agency carries out the management of the Hungarian tourism sector on the basis of a mandate from the government. The responsibilities for destination management are divided into local, regional and central activities. The Agency and its subsidiaries carry out central tasks at the national and regional levels. Roles include the management of the tourism sector, strategy development, development and management of tourism products, central marketing, international sales, communication campaigns and the co-ordination of specific tourism developments.

The Agency co-ordinates and manages professional and other tasks related to destination management and plays a role in the professional co-ordination of Tourinform and the destination management organisation network. The role of Tourinform is to support local marketing and ensure the bilateral flow of information. Clear identification of tourist areas allows for planning, implementation, co-ordination and communication tasks for each destination.

The Agency is creating a new destination management services network. The new model will implement unified management and support the co-operation of local stakeholders to achieve a shared vision for the destination. The aim is for the destination management services, as key players in the tourism ecosystem, to ensure effective communication between local and central levels and within the destination to promote a destination-based approach to product development and successful market entry.

The central budget available to the Hungarian Tourism Agency for the period 2021-30 is HUF 90 billion in 2021, decreasing to HUF 45.9 billion by 2024 and staying at HUF 45.9 billion until 2030.

## Hungary: Organisational chart of tourism bodies



Source: OECD, adapted from the Hungarian Tourism Agency, 2022.

## Tourism policies and programmes

In 2021, Hungary developed a revised Tourism 2.0 Strategy which incorporates the impacts of COVID-19 and the lessons learned through the first three years of the National Tourism Development Strategy 2030. COVID-19 created a new context for tourism, with new objectives being set and related activities defined:

- Complement the previous supply and product-based approach with a strong demand and needs-based approach. The focus of the Strategy is shifting from development to marketing, with a well-developed understanding of international and domestic market segment needs, used for marketing, sales and future development.
- Define a new model of governance whereby sectoral governance is complemented at the destination level. The new network of destination management organisations links central management with the tourism regions.
- Strengthen the role of the Hungarian Tourism Agency in education and career-path shaping to help improve the quality of the workforce.
- Utilise digital solutions to accompany and support the travel process. In addition to the Agency's role, sectoral interests also need to play an active role in developing and connecting digital solutions to improve the guest experience and understanding the opportunities of big data by looking in detail at sub-sectors, such as hospitality and the labour market.
- Promote sustainability as a strategic objective, channelled through sector-based interests to involve actors across all sectors. Sustainability considerations are reflected in product development at the destination level through the introduction of a sustainability trademark and priority development for sustainable and ecotourism attractions (e.g. national park visitor centres and water recreation sites). This will help lay the foundations for a sustainable profile for tourism in Hungary.

The timeframe of the updated Strategy remains unchanged and sets out the direction and priorities until 2030. Tourism 2.0 aims for a 20% increase in guest nights by 2030 compared to 2019. The goal is to increase the number of nights to 50 million per year. These 50 million nights will be generated by 20 million tourists, with an equal distribution of domestic and international tourists. For sustainable growth, it is aimed to share increases between Budapest and rural destinations.

The Strategy identifies areas for development to attract international visitors, especially in the realms of nature, culture and active tourism. Health tourism is also attractive at the regional level from neighbouring source markets. For example, Hungary features 12 internationally important spa towns that account for one-fifth of overnight stays. Consequently, cultural and active tourism attractions, complementary services and the upgrading of spas to an internationally attractive level could be the most important breakthrough for Hungary and individual destinations.

Hungary's Strategy identifies a range of other issues that will complement the structural changes. These include unified destination branding, the use of targeted and personalised marketing channels and quality improvement. Relatively small-scale improvements to quality can strengthen the wider offer. Education and training remain a core theme, as does sector financing. Tailored funding solutions and familiarisation with the needs and performance of the sector are necessary to ensure the continued availability of capital. It is also proposed to alleviate the administrative burden of complex regulation through the interconnection and re-regulation of data services and improved co-operation between sectoral interests, ensuring a clear division of roles and responsibilities between public and other stakeholders.

In terms of the recovery from COVID-19, domestic tourism is expected to be a significant driver of demand. Hungary expects that car-friendly and nature destinations will be popular with visitors, especially those from neighbouring countries.

## Statistical Profile

## Hungary: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism<sup>1</sup></b>					
Total domestic trips	46 816	48 310	47 923	29 932	38 810
Overnight visitors (tourists)	14 374	14 386	14 249	8 919	10 183
Same-day visitors (excursionists)	32 442	33 924	33 674	21 013	28 628
Nights in all types of accommodation	20 790	22 053	22 445	15 736	17 996
Hotels and similar establishments	11 553	12 302	12 394	7 877	8 701
Other collective establishments	5 114	5 188	5 054	2 948	3 599
Private accommodation	4 123	4 563	4 997	4 911	5 696
<b>Inbound tourism<sup>2</sup></b>					
Total international arrivals	22 371	55 462	58 619	29 057	33 050
Overnight visitors (tourists)	14 102	16 766	15 949	6 624	6 973
Same-day visitors (excursionists)	8 270	38 696	42 670	22 433	26 077
Top markets					
Romania	2 076	11 898	13 249	6 733	8 026
Slovak Republic	1 562	10 000	10 072	5 606	5 216
Austria	1 254	8 523	9 053	5 167	5 140
Germany	1 865	3 202	3 075	1 371	2 269
Poland	427	2 425	2 435	1 193	1 438
Nights in all types of accommodation	19 077	20 162	20 794	5 035	7 200
Hotels and similar establishments	12 754	13 094	13 413	3 126	4 139
Other collective establishments	2 188	2 246	2 339	648	932
Private accommodation	4 135	4 822	5 042	1 261	2 129
<b>Outbound tourism</b>					
Total international departures	10 874	19 248	20 722	8 782	8 753
Overnight visitors (tourists)	6 707	7 771	8 318	2 762	3 101
Same-day visitors (excursionists)	4 167	11 477	12 404	6 019	5 653
Top destinations					
Germany	1 007	943	938	356	394
Austria	897	840	701	356	364
Croatia	344	523	470	216	268
Romania	705	788	941	272	244
Slovak Republic	769	883	841	416	213
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION HUF</b>					
<b>Inbound tourism</b>					
Total international receipts	2 299 013	2 608 871	2 979 032	1 291 019	1 738 388
International travel receipts	1 694 330	1 870 832	2 123 363	987 013	1 243 701
International passenger transport receipts	604 683	738 039	855 669	304 007	494 687
<b>Outbound tourism</b>					
Total international expenditure	831 196	877 872	976 583	410 014	519 438
International travel expenditure	672 179	715 494	799 100	356 203	440 144
International passenger transport expenditure	159 016	162 379	177 484	53 812	79 294

| Break in series

1. Trips from demand side surveys; Nights from supply side surveys.

2. Arrivals from demand side surveys; Nights from supply side surveys.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/jlu47e>

## Hungary: Enterprises and employment in tourism

	Number of establishments <sup>1</sup>	Number of persons employed				
	2021	2017	2018	2019	2020	2021
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	<b>194 333</b>	<b>418 017</b>	<b>412 674</b>	<b>421 036</b>	..	..
Accommodation services for visitors	39 741	35 838	41 486	44 305	..	..
Hotels and similar establishments	1 968	30 588	35 201	..	..	..
Food and beverage serving industry	33 806	146 097	131 214	134 382	..	..
Passenger transport	10 828	98 840	91 674	104 111	..	..
Air passenger transport	124	..	..	..	..	..
Railways passenger transport	4	33 138	29 386	37 236	..	..
Road passenger transport	10 519	60 186	55 229	55 980	..	..
Water passenger transport	181	..	..	..	..	..
Passenger transport supporting services	5 480	25 163	30 772	24 753	..	..
Transport equipment rental	4 986	..	..	..	..	..
Travel agencies and other reservation services industry	3 293	8 087	6 298	6 683	..	..
Cultural industry	46 386	39 466	43 468	41 673	..	..
Sports and recreation industry	21 051	27 339	33 598	36 361	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	28 762	29 546	31 837	26 778	..	..
<b>Other industries</b>	<b>..</b>	<b>..</b>	<b>..</b>	<b>..</b>	<b>..</b>	<b>..</b>

.. Not available

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/3yh20r>

## Hungary: Internal tourism consumption

Million HUF

	2019		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>723 466</b>	<b>2 247 976</b>	<b>2 971 441</b>
Tourism characteristic products	426 434	1 339 993	1 766 427
Accommodation services for visitors	146 771	359 885	506 656
Food and beverage serving services	142 551	287 457	430 008
Passenger transport services	61 016	273 349	334 366
Air passenger transport services	48 796	227 696	276 492
Railways passenger transport services	6 180	4 458	10 638
Road passenger transport services	6 035	38 998	45 032
Water passenger transport services	6	2 197	2 203
Passenger transport supporting services	6 653	30 372	37 025
Transport equipment rental services	89	5 363	5 452
Travel agencies and other reservation services industry	26 162	7 759	33 921
Cultural services	8 375	77 484	85 859
Sports and recreation services	28 057	150 531	178 588
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	6 760	147 792	154 552
Other consumption products	297 031	907 982	1 205 014
Tourism connected products	279 775	791 420	1 071 195
Non-tourism related consumption products	17 257	116 563	133 819
<b>Non-consumption products</b>	<b>..</b>	<b>..</b>	<b>..</b>

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/2d8if0>



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