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THE ROLE OF ACCOMMODATION, FOOD SERVICE AND HOSPITALITY IN THE HUNGARIAN ECONOMY IN 2008-2023

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Abstract: *The economic crisis that began in 2008 is now regarded as a historical fact – it was the first major crisis of the 21st century and caused a significant downturn in various sectors of the economy, particularly in lending. After nearly a decade of slow recovery, by 2019, economic indicators in most countries had reached record highs. Then, without much warning, the COVID-19 crisis emerged, creating an unprecedented global health, social, and economic "emergency" that also caused serious disruptions in Hungary. The travel and tourism sector was among the most heavily impacted, with demand dropping significantly at global, regional, and even local levels, and in some cases, coming to a complete halt due to strict travel restrictions such as border closures and the shutdown of restaurants, hotels, and entertainment venues. Although the acute phase of the crisis brought on by the coronavirus had passed by the summer of 2023, many sectors of the economy continue to experience its substantial short-and long-term aftereffects.*
This study focuses on the most affected sector – tourism – and examines the impact of the crisis on it. It explores the development of employment and gross average wages between 2008 and 2023, with special attention given to indicators characteristic of the accommodation and food service industry, such as the number of guest nights, the number of commercial accommodation establishments, and the revenue from domestic and international accommodation services.

Keywords: *crisis; tourism and hospitality; employment; sustainability*

JEL Classification: *G12; G15; G32*

1. Introduction

Tourism is an important driver of economic growth and job creation, but in addition to accommodation and food services, it also serves as a key engine for several other sectors such as road and air passenger transport, spa services, sports and leisure activities, cultural services, and various other industries. Within the Hungarian economy, the tourism sector plays a strategic role in contributing to GDP, maintaining balance in the current account and employment, and boosting overall consumption (Buljat et al., 2024; Darabos, 2015; Tömöri, 2021; Darabos et al., 2024). The accommodation and food service sector has a dual role in labor market: on the one hand, it increases employment, thereby helping to reduce unemployment, which generates revenue and savings for the state, since wages and related taxes and contributions are borne by companies, while unemployment benefits are paid from state funds. Tourism and hospitality are characterized by seasonality, which, along with low wages, significantly contributes to high employee turnover.

This study presents the trends in employment and gross average wages between 2008 and 2023, with a particular focus on indicators specific to the accommodation and food service sector, such as the number of guest nights, the number of commercial accommodation establishments, and domestic and international accommodation revenues. The data confirm that during periods of crisis, a downturn is typical across many sectors, and there are also significant regional variations (Gyurko et al., 2024); however, during the recovery phase, the goal is to achieve the highest possible growth across all sectors of the economy. The tourism and hospitality sector had already reached pre-crisis levels in several areas by 2022–23, and in some cases significantly exceeded them. European Union development funds played a significant role in the development of tourism in Hungary. The subsidies were primarily aimed at helping less developed regions and rural tourism catch up. According to Iron and colleagues, rural tourism can contribute significantly to the performance of the rural economy, but during development efforts, the focus should be on quality factors (productivity, authentic experiences, workforce skills, etc.) rather than quantitative indicators (Iron et al., 2024).

One of the key issues of the 21st century is the need to enhance social and economic sustainability while reducing social and environmental degradation (Árva et al., 2020; Csobán et al., 2022). The "industry" of tourism significantly contributes to environmental pollution through the use of natural resources, open-air recreational spaces, sports facilities, and similar infrastructures.

Beyond the relevant academic sources, the research relies primarily on statistical data published by the Hungarian Central Statistical Office (KSH) and publicly available databases of the Hungarian National Bank (MNB).

2. Key Indicators of the Accommodation and Food Service Sector between 2008-2023

At the national economy level, the number of employed persons declined after 2008, and the employment rate fell below 60%. From 2014 onwards, a more significant increase was observed, with only minor declines in 2020 and 2021, but by 2023 employment levels had returned to those of 2019. Between 2008 and 2023, the number of employed persons increased from 3.83 million to 4.6 million, representing nearly 800,000 new jobs (Table 1). During 2009-2013, the unemployment rate fluctuated around 10-11%, but from 2013 onwards, it steadily decreased, resulting in a reduction in the number of unemployed from 416.6 thousand to 156.9 thousand between 2009 and 2019. However, during the COVID-19 crisis, an increase in unemployment was again observed.

In the accommodation and food service sector, employment grew slowly between 2009 and 2016, but from 2017 onwards, the number of employees in the sector continuously declined, primarily due to low wages, prompting many to seek employment abroad. Throughout the 2010s, the sector was increasingly characterized by a shortage of skilled labor. The lowest point in employment during the coronavirus pandemic was recorded in the first quarter of 2021, when only 142,000 people were employed in accommodation and food services – approximately 50,000 fewer than in the corresponding quarter of 2019 (Zerényi, 2023).

Table 1: Economic Activity of the Working-Age Population

Year	Employed persons (thousands)	Unemployed persons (thousands)	Unemployment rate (%)	Employment rate (%)	Accommodation and food service sector (thousands)	Change compared to previous year (%)
2009	3 831,4	416,6	9,8	59,8	157,2	1,00
2010	3 811,4	468,4	10,9	59,6	154,2	0,98
2011	3 833,0	464,5	10,8	60,3	165,2	1,07
2012	3 886,8	470,3	10,8	61,6	168,0	1,02
2013	3 963,8	438,2	10,0	63,3	164,7	0,98
2014	4 155,1	341,1	7,6	67,2	173,2	1,05
2015	4 275,8	306,4	6,7	68,3	189,0	1,09
2016	4 403,7	232,7	5,0	70,9	200,8	1,06
2017	4 489,3	190,6	4,1	71,5	195,5	0,97
2018	4 515,3	168,6	3,6	73,0	185,9	0,95
2019	4 548,6	156,9	3,3	72,4	193,4	1,04
2020	4 484,9	194,6	4,2	72,1	176,9	0,91
2021	4 511,2	190,4	4,0	73,3	169,4	0,96
2022	4 583,5	171,6	3,6	73,5	181,8	1,07
2023	4 600,1	198,3	4,1	73,9	179,5	0,99

Source: KSH (2024)

Following the lifting of pandemic restrictions, employment gradually increased in 2022, reaching nearly 182,000 people, which was 12,400 more than the previous year, though still below the pre-pandemic figure of 193,400. Although the number and proportion of vacant positions slightly decreased, the shortage of skilled labor continued to pose a significant problem for the sector. During these years, an increasing number of workers left the sector, seeking better-paid employment either abroad or in other industries (Béresné et al., 2021). In 2023, employment levels in the sector still had not recovered to pre-crisis levels: in the first quarter of 2023, approximately 12,000 fewer people were employed compared to the same period in 2019. Additionally, due to unfavorable demographic trends, the shrinking labor force is expected to remain one of the sector's greatest challenges (Zerényi, 2023). Even rising wages have not been sufficient to boost employment figures in this sector.
In 2023, the proportion of vacant positions in the accommodation and food service sector was 0.2 percentage points lower than the previous year, remaining below the national average (KSH, 2024).

According to Fekete-Fábián and co-authors (2022), following the prolonged 2008 economic crisis, the long-term decline in the number of registered job seekers was significantly supported not only by market processes but also by state interventions (such as the expansion of public employment programs and large-scale public investments), and this positive trend continued practically until the outbreak of the pandemic. The decrease in employment due to lockdown measures would have been even more severe if workers in certain occupations and sectors had not been able to shift to remote work, typically working from home. According to research by Köllő and his co-authors (2021), most job losses occurred in the service sectors, including accommodation, catering, and tourism, despite the fact that these sectors had a much higher-than-average proportion of employees who were not working but had not been dismissed, as well as a particularly high proportion of employees working remotely. Without the opportunity for remote work, the employment rate would have deteriorated even more significantly.

The crisis also substantially increased the already high levels of income inequality (Köllő et al., 2021; Barizsné et al., 2021). While lower-income groups depleted almost all of their savings, higher-income groups generally did not experience financial hardship. Furthermore, the job loss rate was considerably higher among groups with lower education levels and those more vulnerable to deep poverty, compared to university graduates, further exacerbating income inequality.

Table 2: Trends in Gross Average Earnings in the National Economy and in the Accommodation and Food Service Sector, and Their Proportion

Years	National economy average (HUF)	Of which: accommodation and food service sector (HUF)	National economy average change compared to previous year = 100%	Accommodation and food service sector change compared to previous year = 100%	Ratio compared to national economy average = 100%
2009	199 837	122 561	100,6	101,6	61,3%
2010	202 525	122 699	101,3	100,1	60,6%
2011	213 094	125 757	105,2	102,5	59,0%
2012	223 060	139 731	104,7	111,1	62,6%
2013	230 714	146 742	103,4	105,0	63,6%
2014	237 695	152 874	103,0	104,2	64,3%
2015	247 924	157 560	104,3	103,1	63,6%
2016	263 171	165 969	106,1	105,3	63,1%
2017	297 017	189 489	112,9	114,2	63,8%
2018	329 943	211 984	111,3	112,6	64,2%
2019	356 286	234 509	111,3	111,5	65,8%
2020	391 194	245 265	109,8	104,6	62,7%
2021	425 915	261 633	108,9	106,7	61,4%
2022	499 980	314 513	117,4	120,2	62,9%
2023	571 182	367 194	114,2	116,8	64,3%

Source: KSH (2024)

In the national economy, gross average earnings nearly tripled between 2009 and 2023, rising from 200,000 HUF to 571,000 HUF, while in the accommodation and food service sector, they almost tripled as well, from 123,000 HUF to 367,000 HUF (Table 2). From 2017 onwards, the annual growth of the national gross average wage (297,017 HUF in 2017) slightly exceeded 10%, while in the accommodation and food service sector, there was a 14% increase in 2017. However, wage growth in the sector stagnated somewhat in the following years, only surpassing 20% in 2022, with nearly 17% growth recorded in 2023, resulting in a gross monthly wage of 367,000 HUF for employees in the sector. Despite this substantial increase, the gross monthly average earnings of employees in accommodation and food services remain among the lowest, amounting to only 64.3% of the national average, still falling short of the pre-crisis 2019 level (65.8%).

Table 3: Key Indicators of the Accommodation and Food Service Sector

Years	Tourism balance (billion HUF)	Change in the number of beds in commercial accommodation facilities compared to the previous year = 100.0%	Change in the number of guest nights in commercial accommodation facilities compared to the previous year = 100.0%
2007	430	99,8	102,4
2008	506	96,2	99,2
2009	612	99,7	93,7
2010	652	103,2	104,5
2011	666	109,3	105,4
2012	692	98,8	105,8
2013	750	108,7	105,3
2014	880	101,3	106,4
2015	975	100,8	106,0
2016	982	102,0	106,7
2017	1 016	92,3	107,7
2018	1 179	100,4	104,2
2019	1 340	99,1	101,7
2020	650	77,9	43,4
2021	834	102,8	118,3
2022	1 228	103,8	153,6
2023	1 552	100,9	101,5

Source: KSH (2024)

The data in Table 4 and Figure 1 show the trends in the number of guest nights spent by domestic and foreign visitors. Both groups experienced a decline by 2009, with a larger drop observed among foreign guest nights (7.9%). In 2020, there was a significant decrease in both domestic (37.2%) and foreign (76%) guest nights, primarily due to travel and hospitality restrictions, most notably the closure of borders (Palkovics, 2022). In 2021, a recovery began, with the number of domestic guest nights increasing by 12.2% and foreign guest nights rising by 34.4%. In 2022, both segments showed significant growth, with domestic guest nights nearly reaching the 2019 level.

In 2023, while the number of domestic guest nights decreased by 5.4%, the number of foreign guest nights increased by 10.2%, although the latter still did not reach the 2019 figures. The decline in domestic guest nights can primarily be attributed to a decrease in household consumption, explained by high inflation and rising food prices and accommodation costs.

Table 4: Number of Domestic and Foreign Guest Nights in Commercial Accommodation Facilities

Years	Number of domestic guest nights	Number of foreign guest nights	Domestic change compared to previous year	Foreign change compared to previous year	Total	Total change compared to previous year
2007	9 957	10 171			20 128	
2008	9 964	10 010	0,1%	-1,6%	19 974	-0,8%
2009	9 490	9 220	-4,8%	-7,9%	18 710	-6,3%
2010	9 940	9 614	4,7%	4,3%	19 554	4,5%
2011	10 205	10 411	2,7%	8,3%	20 616	5,4%
2012	10 413	11 392	2,0%	9,4%	21 805	5,8%
2013	10 985	11 983	5,5%	5,2%	22 968	5,3%
2014	12 082	12 351	10,0%	3,1%	24 434	6,4%
2015	12 925	12 962	7,0%	4,9%	25 888	6,0%
2016	13 827	13 802	7,0%	6,5%	27 629	6,7%
2017	14 827	14 942	7,2%	8,3%	29 769	7,7%
2018	15 671	15 340	5,7%	2,7%	31 011	4,2%
2019	15 785	15 753	0,7%	2,7%	31 538	1,7%
2020	9 916	3 774	-37,2%	-76,0%	13 690	-56,6%
2021	11 122	5 071	12,2%	34,4%	16 193	18,3%
2022	15 590	12364	40,2%	143,8%	27 954	72,6%
2023	14 744	13629	-5,4%	10,2%	28 373	1,5%

Source: KSH (2024)

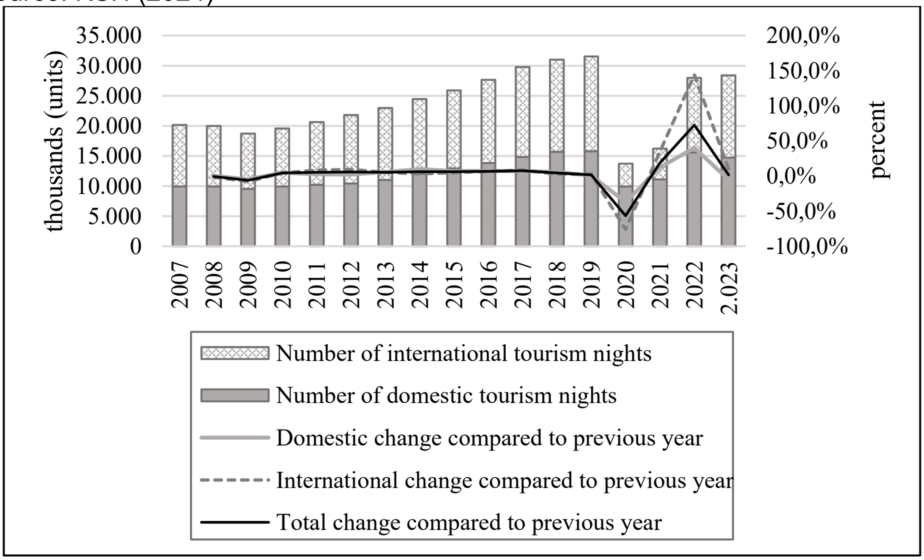

Figure 1: Number and Change of Domestic and Foreign Guest Nights in Commercial Accommodation
Source: KSH (2024)

According to data from the Hungarian Central Statistical Office (KSH), in 2009 the number of domestic guest nights fell to 95% and that of foreign guest nights to 92% compared to the previous year. In the following years, growth resumed, fluctuating

between 2% and 11%. In 2020, however, a dramatic decline occurred: the number of domestic guest nights dropped to 59.5%, and foreign guest nights plummeted to 22.2% of the previous year's figures (KSH, 2024), exceeding the rate of overall decline in total guest nights. Resilience to crises is enhanced by a proper balance between international and domestic tourism, as well as a diversified tourism offering, such as health tourism, natural attractions, and historic cities (Gyurko et al., 2024).
Accommodation revenues fell by 2-3% in 2009-2010, with little difference between domestic and foreign guests (see Figure 2). By 2019, revenues from both segments showed continuous growth. The amount paid by domestic guests nearly doubled (2.4 times higher), while revenue from foreign guests increased by almost 2.7 times during the period between the two crises. In 2020, domestic accommodation revenues dropped to 65.8%, while foreign revenues were severely hit by border closures, falling drastically to 21.6% compared to the previous year. In both 2022 and 2023, commercial accommodations realized significantly higher revenues in both segments, well above the 2009 levels.
The average gross accommodation fee per guest night paid by domestic guests increased from HUF 5,445 in 2009 to HUF 7,855 in 2019, while the corresponding figure for foreign guests rose from HUF 8,400 to HUF 13,250. This indicates that foreign tourists tend to choose more expensive accommodations offering higher-quality services. In 2020, the average accommodation fee per night for domestic guests did not decrease – in fact, it increased by 9.1%, while the fee paid by foreign guests fell by nearly 10%. In 2022 and 2023, however, both segments recorded a significant increase in average accommodation prices.

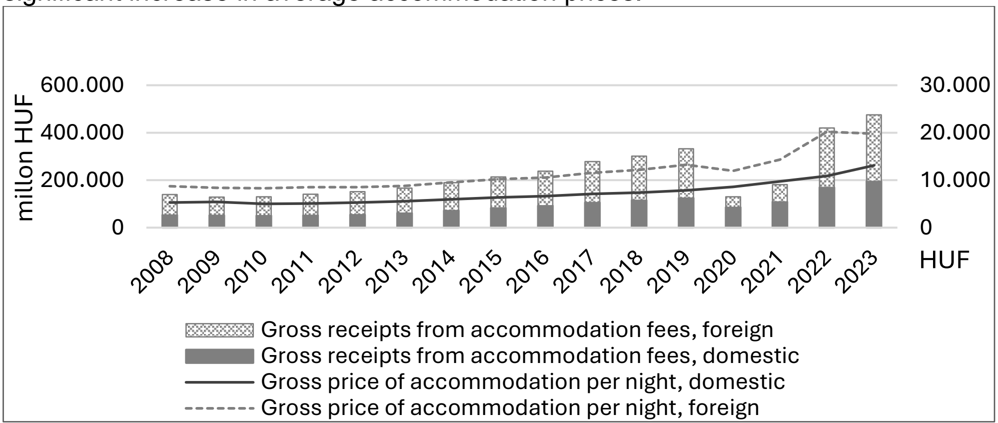

Figure 2: Accommodation Revenue and Gross Average Price per Guest Night in Commercial Accommodations – Domestic and Foreign
Source: KSH (2024)

The continuous increase in accommodation revenues was influenced not only by the rise in guest nights and the number of visitors but also by the ongoing weakening of the Hungarian forint. Accommodation prices significantly increased as early as 2022; when viewed in euros, the price hike was around 15%, indicating that accommodations became more expensive even alongside the forint's depreciation. However, payments made in forints provide a competitive advantage for accommodation providers, especially in Budapest, as Western guests are inclined to spend in non-eurozone countries primarily due to lower consumer prices.

During the period of the energy crisis and ongoing war, Western tourists have become more cautious, carefully considering where to spend their holidays. Prices continued to rise in 2023, with KSH data indicating an increase between 17% and 20%. Not only energy but also food prices have significantly increased, leading to substantial cost escalations for accommodations. The sector continues to face serious challenges due to labor shortages, further wage increases, and rising raw material costs, all contributing to additional price hikes. These costs are largely passed on to consumers, as companies can no longer absorb them.

3. The Issue of Sustainability in the Tourism Sector

The above analysis reveals that following the COVID crisis, employment increased, unemployment decreased, and the number of guest nights and both domestic and foreign visitors rose sharply. According to the latest statistical data, records were broken in Hungary in 2023 and 2024. But how long can this be sustained? Achieving sustainable tourism has become a priority for all stakeholders in Europe and Hungary. This requires ensuring an appropriate economic environment, social sustainability, and environmental sustainability.

After the pandemic – and even before – European tourism faced a new challenge: so-called "overtourism," its consequences, and the need for management and restrictions. While tourism boosts GDP, local residents – especially in large cities – are less enthusiastic about the influx of tourists, not to mention that increased demand drives up consumer and real estate prices. Árva and colleagues (2020) concluded that while tourism is one of the most dynamically developing sectors of the national economy, it has also become one of the largest polluters and least sustainable, making further tourism development nearly impossible in several destinations. In this situation, instead of previous solutions, new approaches must increasingly be integrated into marketing tools. Hungary has opportunities in this area, such as health, medical, and business tourism (Kinczel et al., 2023; Csobán et al., 2022; Novoselova et al, 2023). In his study, Gyurko highlights the importance of sustainable tourism development, the quality of infrastructure, and the role of integrating ESG factors (environmental, social, and governance considerations) in ensuring long-term competitiveness (Gyurko, 2025).

Sustainability will continue to be a defining trend in tourism. Tourists are increasingly seeking destinations and accommodations that employ environmentally friendly solutions. In Hungary, demand for nature-based tourism –such as national parks, ecotourism sites, and sustainable accommodations – is expected to grow.

According to Gabor et al., however, travellers consider factors such as air transport infrastructure, cultural resources, and price competitiveness to be just as important as environmental sustainability when making their decisions (Gabor et al., 2021).

4. Summary

Globally and within Hungary, tourism has been one of the most dynamically growing sectors in the last decades of the 20th century and the first two decades of the 21st century, becoming a social phenomenon affecting an increasingly broad segment of the population. However, crises have not spared this sector either.

Both crises led to downturns in the sector, but the consequences of measures aimed at curbing the pandemic – which also restricted free movement – were much more significant than those of the global economic crisis. Additionally, the two crisis periods affected domestic and foreign tourist travel differently.

The 2020 crisis impacted foreign tourist traffic almost immediately and to a much greater extent. From a regional perspective, while the global economic crisis did not

have a significant loser in tourism, Budapest suffered the most during the COVID-induced crisis, experiencing a drastic decline in foreign tourists. Nationwide, guest traffic, the number of guest nights, and accommodation revenues also significantly decreased. However, by 2023, the sector had already achieved significant results, reaching or surpassing 2019 levels in several areas, despite the substantially changed economic environment – primarily due to average inflation rates of 15-20% and rising energy prices, with food prices increasing by 30-50%.
During the 2008 crisis, the state did not intervene in the sector, but during the COVID crisis, entrepreneurs received benefits such as wage subsidies and reduced local tax obligations. Nevertheless, the sector suffered significant losses after 2020, with substantial labor migration to other sectors, and many small businesses ceased operations due to skyrocketing energy prices, most of which have not resumed activities since. While many smaller accommodations closed, several new, higher-standard, trend-setting accommodations opened across the country, which in itself is a price-increasing factor. Additionally, the reduced supply – or decreased competition – contributed to price increases. The restart occurred as early as 2021 in the accommodation and hospitality sector, and in 2022-2023, several areas significantly exceeded pre-2019 levels.
However, statistical data reveal a kind of duality behind the positive trend: while the number of foreign guests and guest nights is increasing, domestic demand is stagnating or shifting. According to statistics, Hungarians are traveling more, but an increasing number are choosing to travel abroad.
At the same time, the question arises: to what extent does the rapid growth following major crises serve sustainable, less polluting, environmentally and socially friendly tourism? Stakeholder interest conflict, and in the long term, resolving this must become a priority for decision-makers.

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