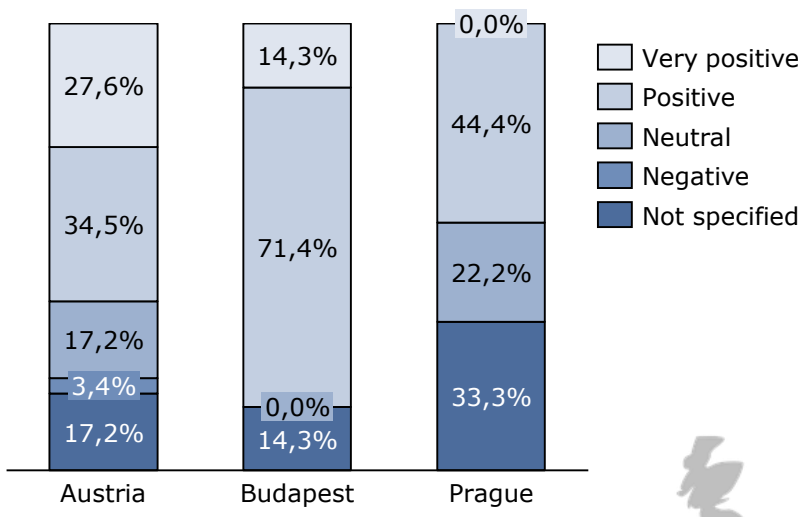


FACT SHEET

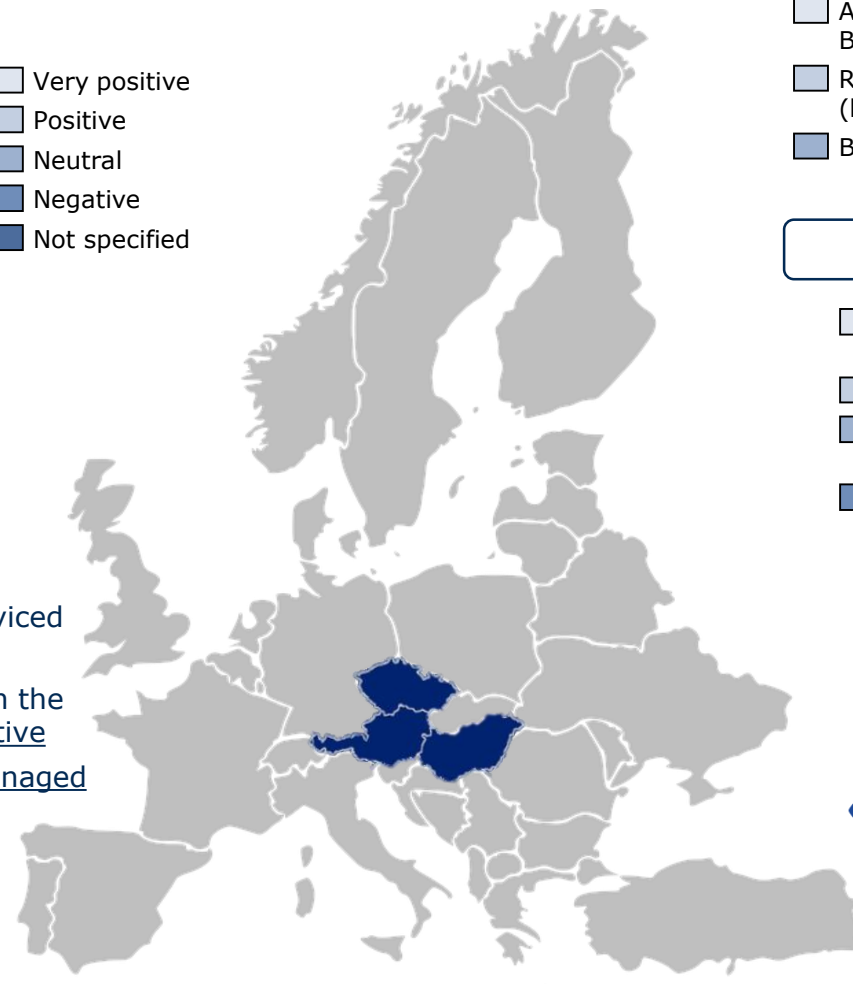
Market Report Serviced Apartment & Serviced Accommodation 2019 for Austria, Budapest and Prague

How would you estimate the **development** of the serviced apartment / accommodation market in your home country (**total market**) for the year 2019?

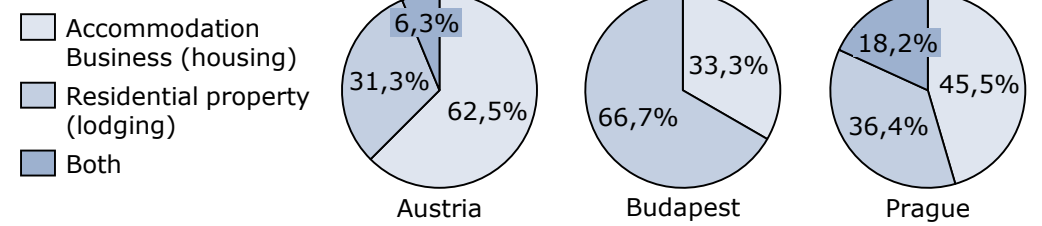


**Austria** Overview of market perception for serviced apartment/accommodation

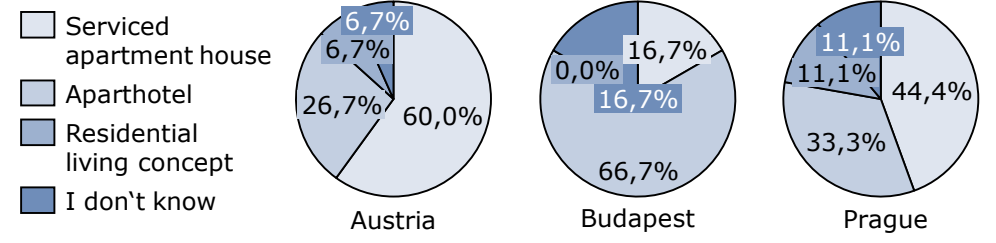
- 62,1% consider the market development on the overall market in Austria positive/very positive
- 36,7% of the establishments are owner-managed
- 86,2% offer WLAN
- 62,1% do not offer breakfast
- 45,8% increased their prices compared to the previous year



To which **object type** does your house belong to?



To which **operating type** does your house belong to?



**Budapest (Hungary)** Overview of market perception for serviced apartment/accommodation

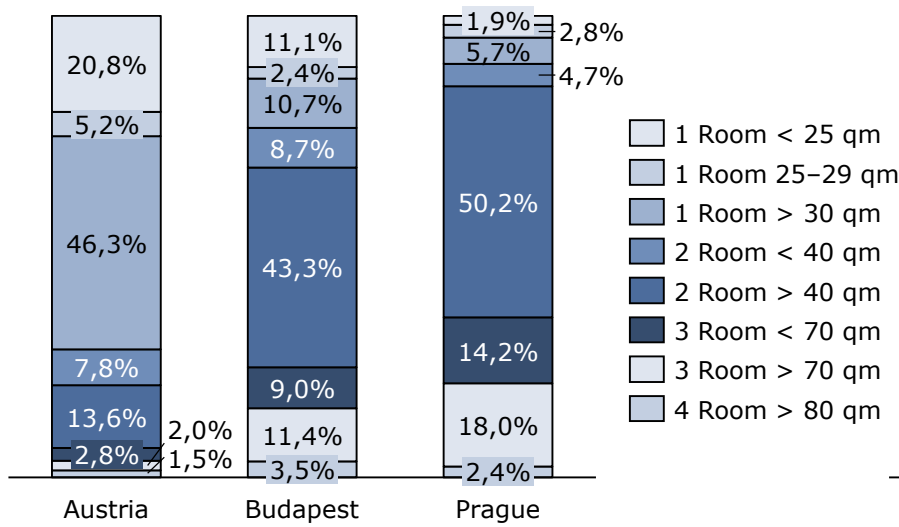
- 85,7% consider the market development on the overall market in Budapest positive/very positive
- 100% increased their prices compared to previous year

**Prague (Czech Republic)** Overview of market perception for serviced apartment/accommodation

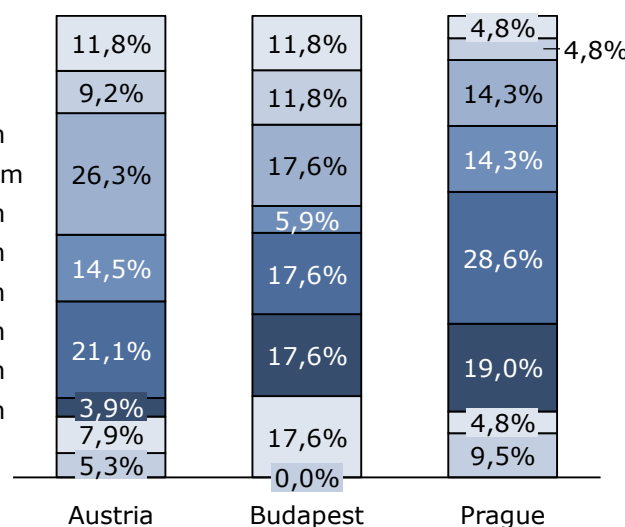
- 44,4% consider the market development on the overall market in Prague positive/very positive
- 50% decreased their prices compared to previous year

Serviced Apartment/Accommodation **Supply & Demand** by Segments

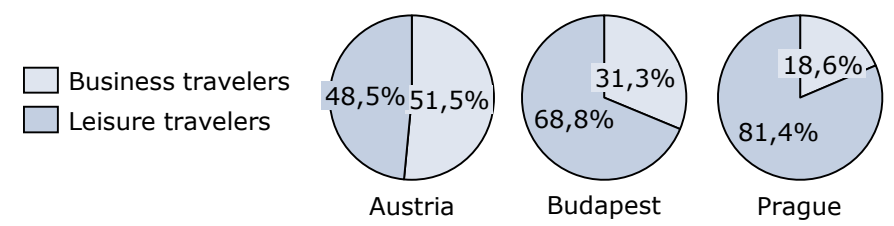
Supply



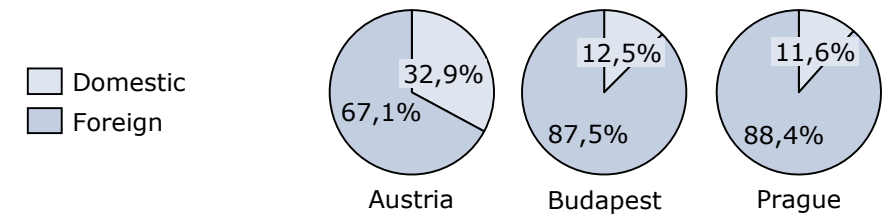
Demand



Guest Share

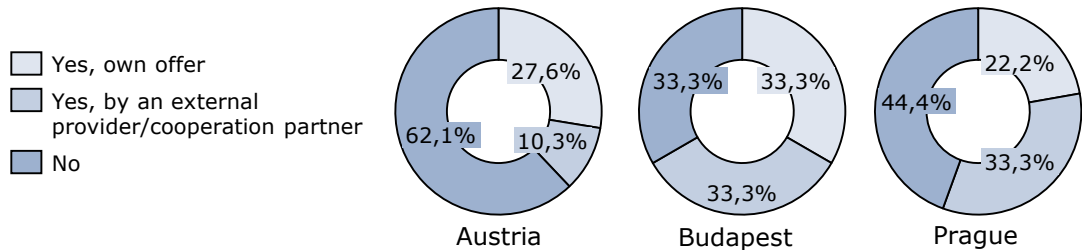


Guest Origin



Serviced Apartment/Accommodation **Service & Cleaning**

Breakfast Offer



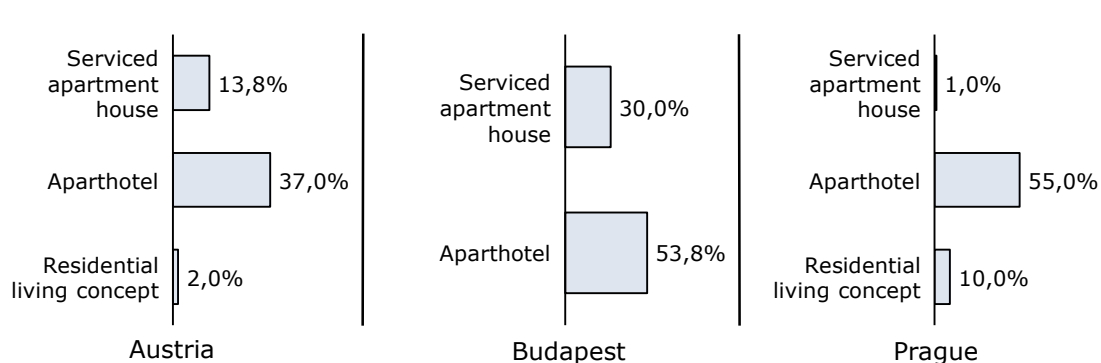
WLAN

- Austria - 86,2% offer WLAN with full bandwidth
- Budapest - 100% offer WLAN with full bandwidth
- Prague - 88,9% offer WLAN with full bandwidth

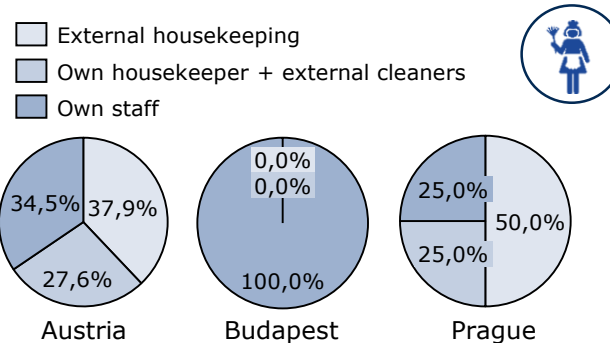
Parking

- Austria - 86,2% offer parking spaces / greatest demand for serviced apartment houses (44,0%)
- Budapest - 50,0% offer parking spaces / greatest demand for aparthotels (25,0%)
- Prague - 88,9% offer parking spaces / greatest demand for aparthotels (21,7%)

Breakfast Demand



Cleaning



Included Basic Cleaning

- Austria - 42,9% offer a daily cleaning at short & medium stay
- Austria - 34,5% offer a weekly cleaning at long stay
- Budapest - 50% offer 2x weekly cleaning (short & medium stay)
- Budapest - 66,6% offer cleaning once or twice a week (long stay)
- Prague - 50% offer a weekly cleaning at long stay

Key Tourism Indicators of 2018

Vienna (Austria)

Number of establishments	426
Number of rooms	34,1K
Occupancy (rooms)	77,8%
Length of stay	2,2 nights

Budapest (Hungary)

Number of establishments	201*
Number of rooms	19,8K*
Occupancy (rooms)	76,0%
Length of stay	2,4 nights

Prague (Czech Republic)

Number of establishments	531
Number of beds	75,0K
Occupancy (rooms)	79,0%
Length of stay	2,3 nights