



HOTELS, HOTELS, HOTELS

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JAN

JAN HOSPITALITY

HOTEL EXPERTS

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REALITNÍ MIXÉR

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REALITNÍ KANCELÁŘ

CZECHIA IN 2024 BETTER THAN THE FAMOUS 2019

In **2024** hotels welcomed

- 22.8 million guests
- 57.3 million nights in total

Domestic tourists – 54 % of all guests

- Year-on-year decrease of 0.7 % in arrivals
- YoY **decrease 2.2 %** in overnight stays

Foreign visitors

- increased by 9.7 % YoY overnight stays
- growing by 9.2 % compared to 2023

Compared to 2019

- hotels recorded 820,000 more tourists
- 264,000 more overnight stays

21 998 366

Number of Arrivals

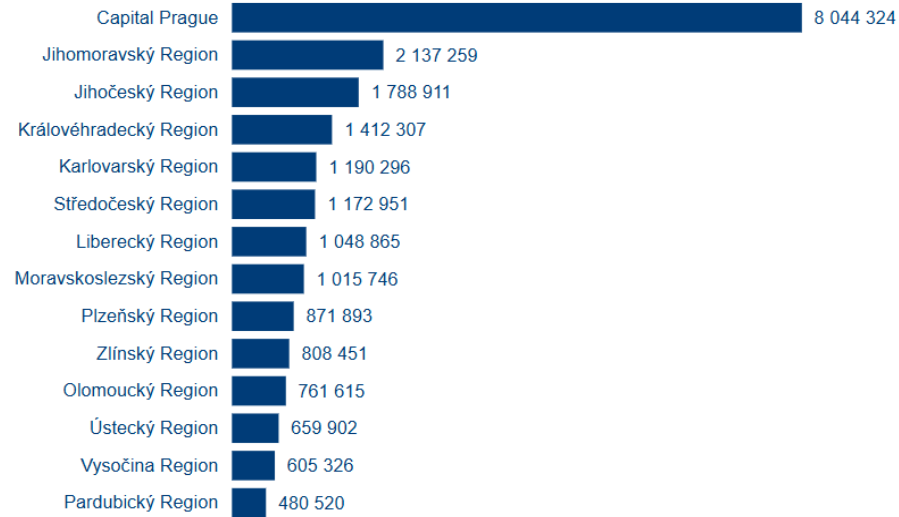
57 024 767

Number of Overnight Stays

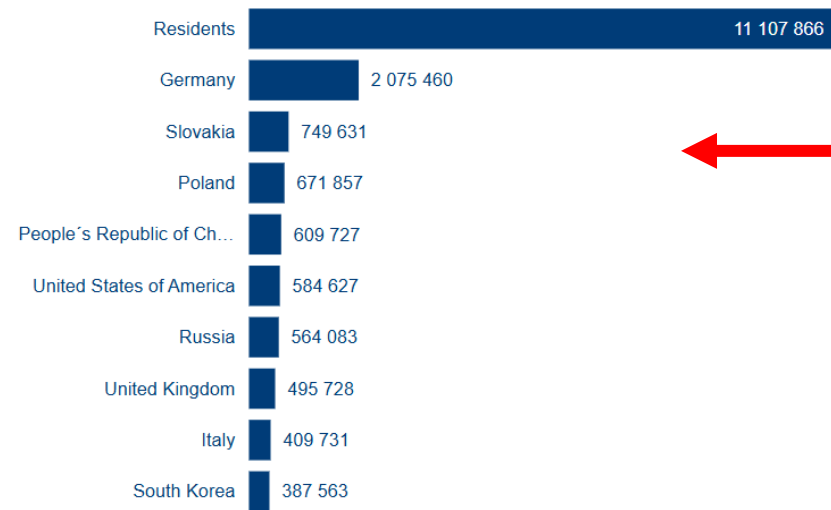
3,59

Average Length of Stay (in Days)

DISTRIBUTION OF TOURIST ARRIVALS IN REGION



TOP 10 COUNTRIES ACCORDING TO NUMBER OF ARRIVALS



2019

22 818 355

Number of Arrivals

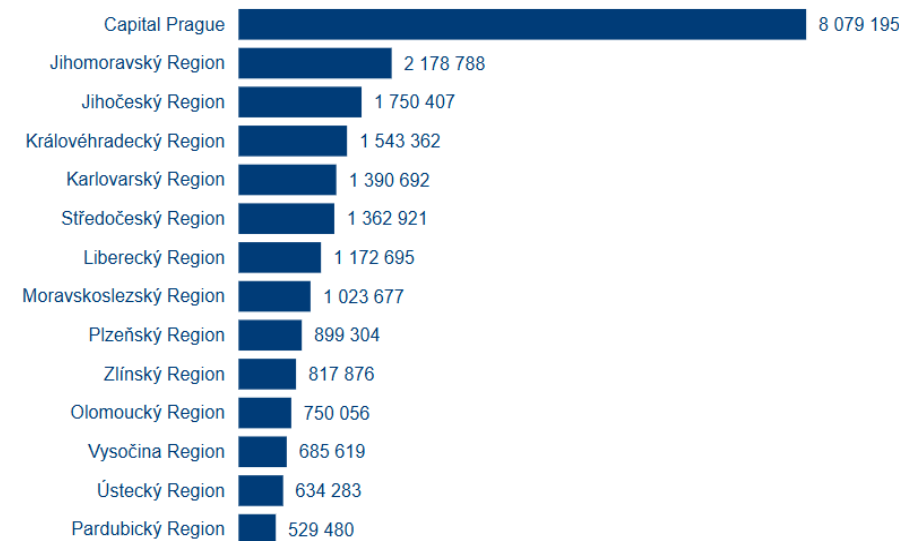
57 288 905

Number of Overnight Stays

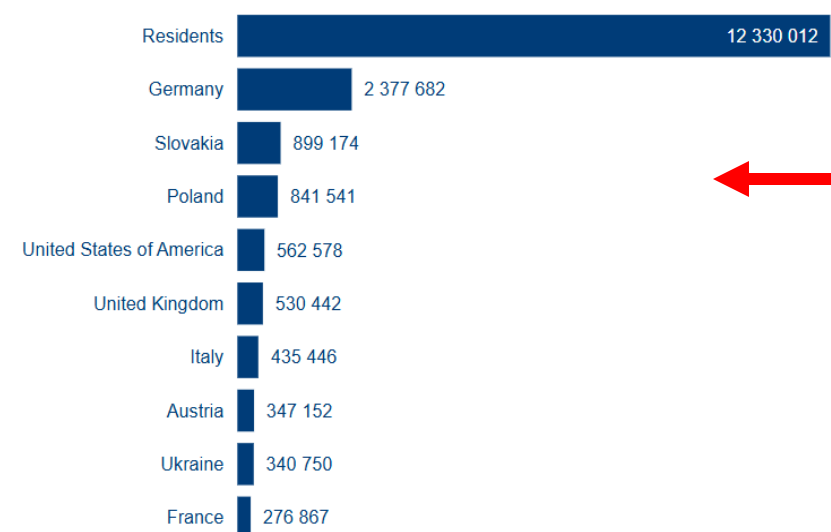
3,51

Average Length of Stay (in Days)

DISTRIBUTION OF TOURIST ARRIVALS IN REGION

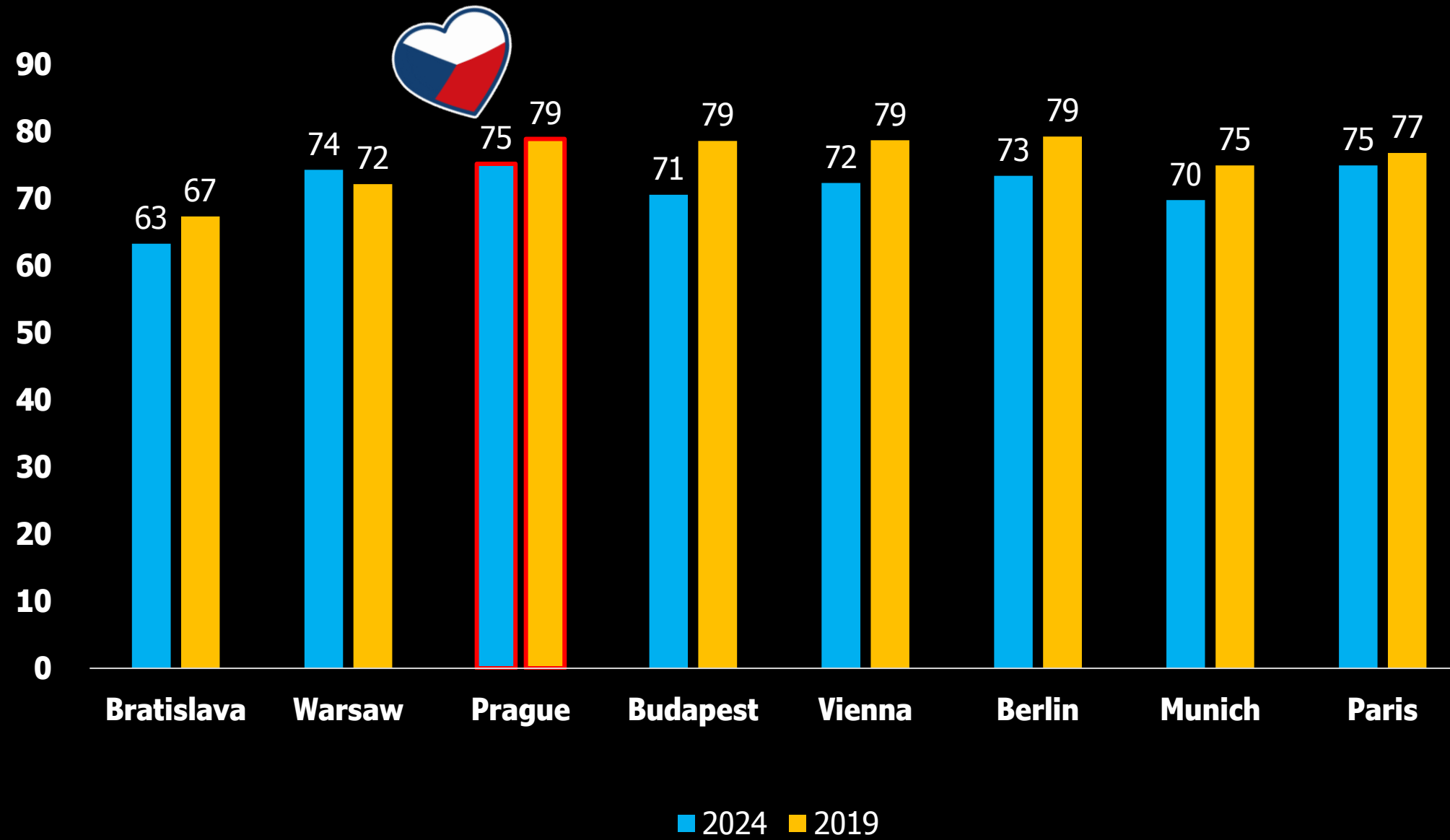


TOP 10 COUNTRIES ACCORDING TO NUMBER OF ARRIVALS



2024

Prague vs other main destinations Rooms occupancy (%) comparison 2024 vs 2019

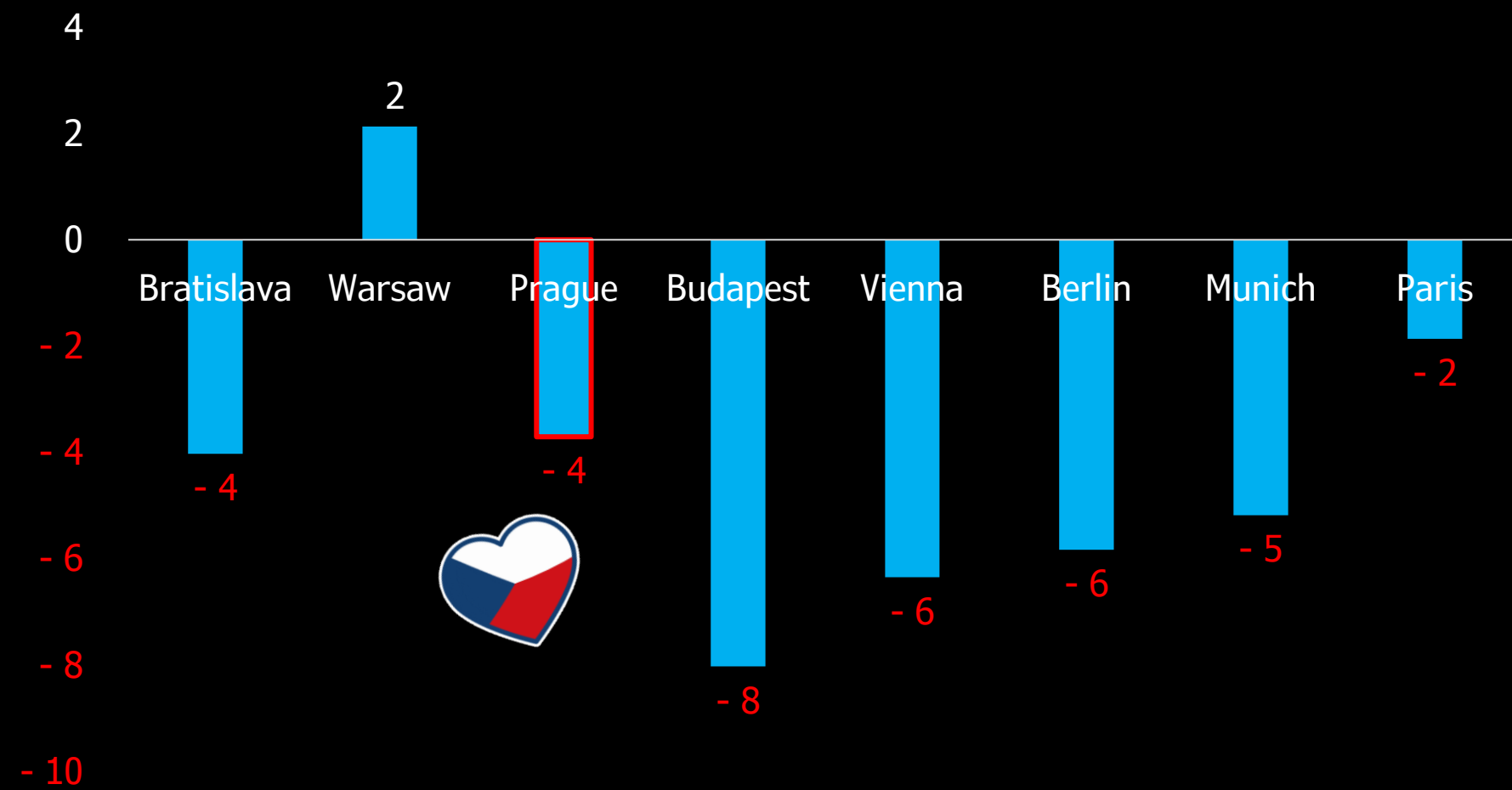


Source STR Global



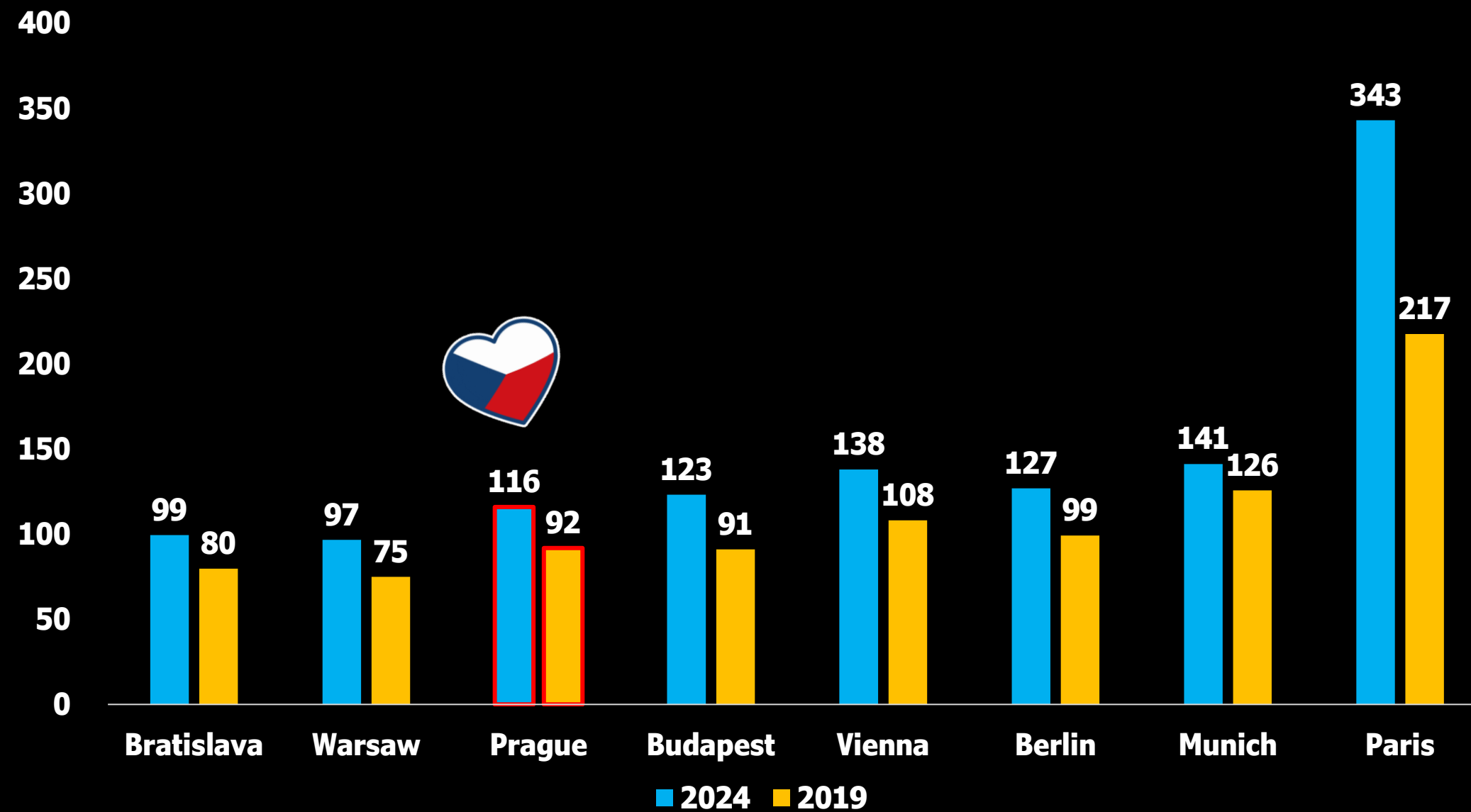


Occupancy difference 2024 vs 2019 %



Source STR Global

ADR (average daily rate / key) comparison 2024 vs 2019 EUR

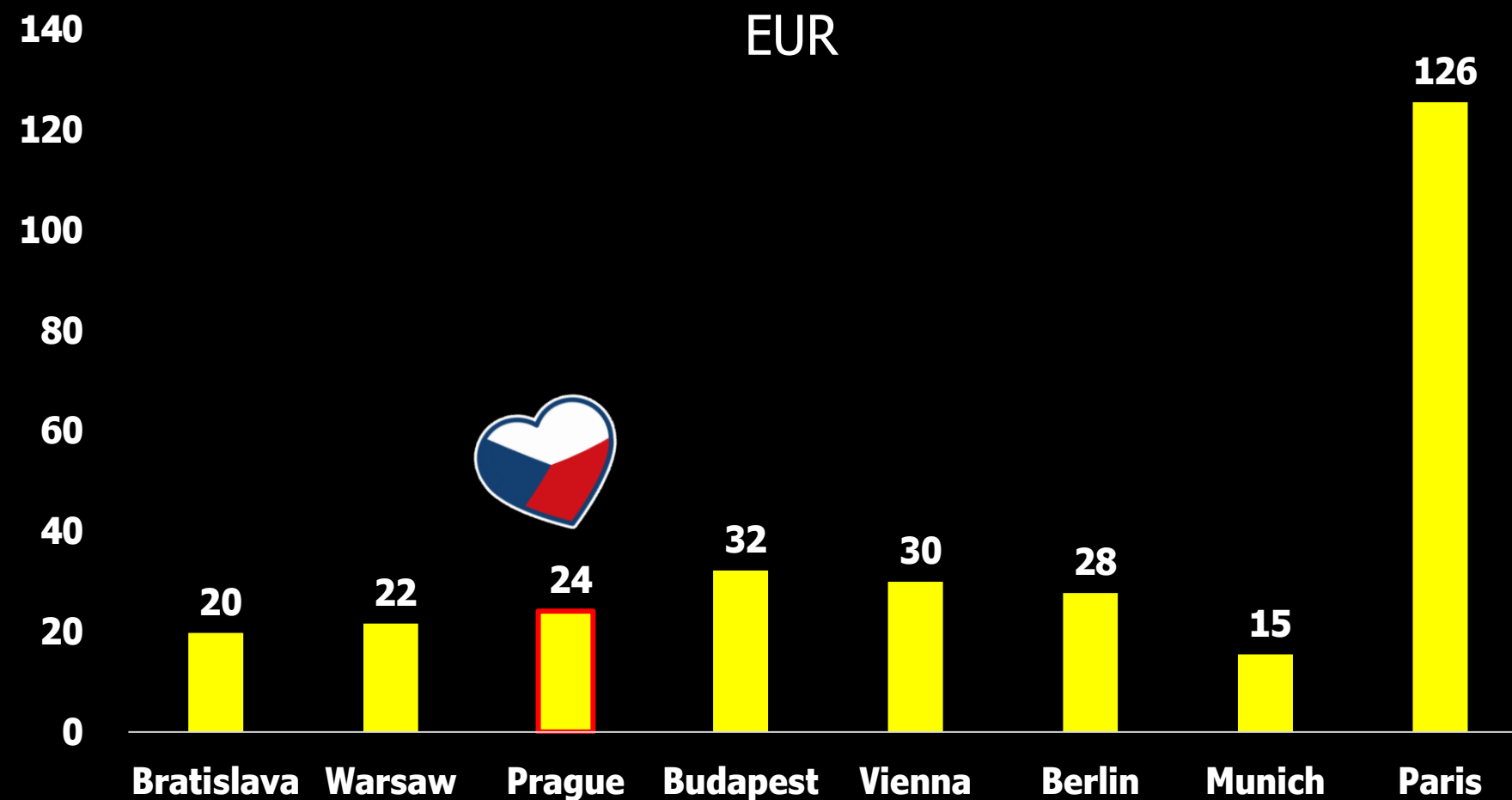


Source STR Global





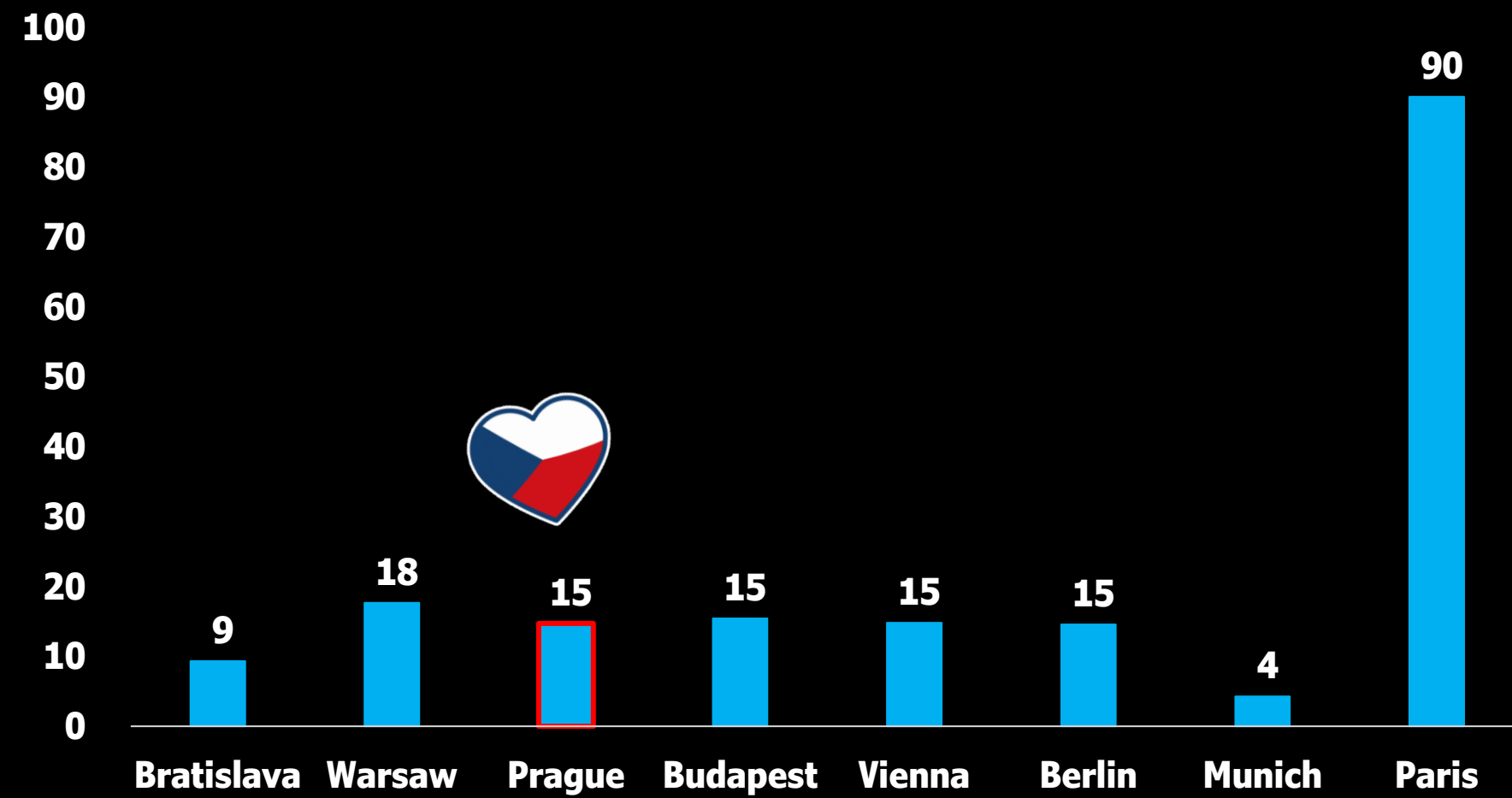
ADR difference 2024 vs 2019 EUR



Source STR Global



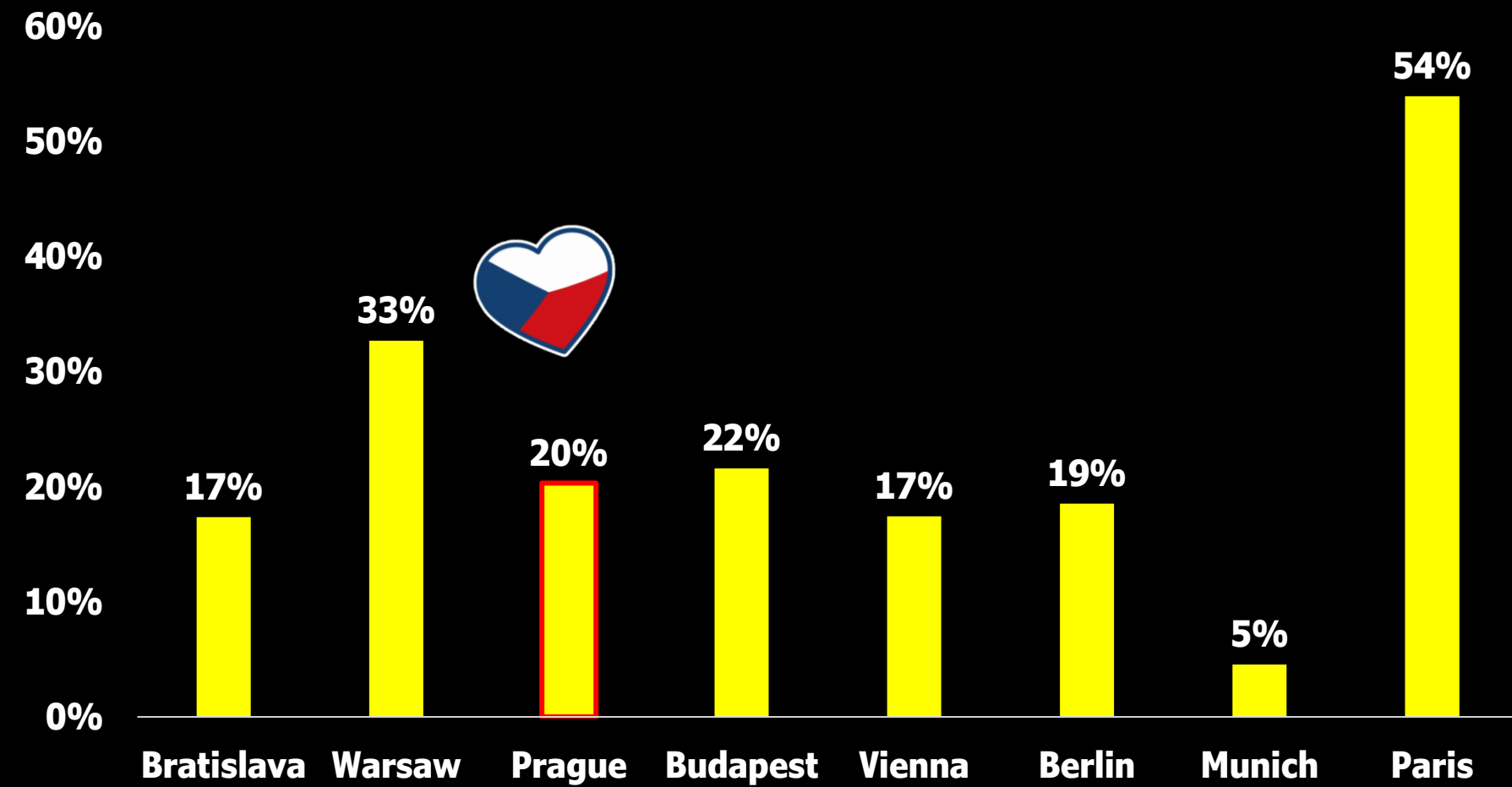
RevPAR difference 2024 vs 2019
absolut value (EUR)



Source STR Global



RevPAR difference 2024 vs 2019 %



Source STR Global



THE MAIN REASONS WHY HOTELS MAY BE STRUGGLING

- ↓ Not defined **product** / target **client**
- ↓ Bad **revenue** management
- ↓ „We prefer to do things our own **old** way”
/ no will for **changes**

MARKET ACTIVITY

- ↑ New hotels **coming** – Prague, Ostrava, Zlín, Břeclav
- ↑ New hotel **openings** – Cloud 9, W Prague, Fairmont Prague, Zleep (Waltrovka)
- ↑ Hotels **recently sold** – Hilton Prague, Juliš Prague, Perla Prague, Barcelo Brno, Four Seasons to be announced soon



MARKET ACTIVITY JAN HOSPITALITY FEASIBILITY STUDIES

- ↑ The very best **sport hotel resort** in middle Europe
- ↑ **Longevity** resort
- ↑ Luxury **self-service** hotel-style apartments with wellness
- ↑ Plenty of **valuations**





MARKET LIMITS

- ↓ Bank loans still **expensive**
- ↓ ESG / BREEM / PENB
- ↓ Still not having **EURO**
- ↓ **Overtourism & AirBnB**
- ↓ eTurista

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