

# DUNA HOUSE BAROMETER

The latest property market info  
from Duna House network

**Issue 161**  
**November 2024**



**DHS**  
**BÉT**

**PRIME  
MARKET**

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## FORTHCOMING ISSUES

DATE OF ISSUE	CONTENT
13.01.2025	Q4 2024 data (including price indices and housing loan data)
12.02.2025	January 2025 data
12.03.2025	February 2025 data

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## GENERAL INFORMATION CONCERNING THE CONTENT OF THE PRESENT PUBLICATION

**Attention! The present publication must not serve as grounds for estimating, or making conclusions in relation of Duna House business profitability.**

**All data, information, estimates and professional statements presented in the publication are developed based on data gained from the activities of Duna House Holding members,** or in some cases are based on subjective experience. Application of those for the entire Hungarian property market may require additional corrections.

Data sources – unless indicated differently at the given section – derive from the database operated by Duna House Holding, the content of which is compiled by members of the network upon their individual judgement and information gained from clients. The operator does not take responsibility for the comprehensiveness of the data. Data presented in the present publication is mainly based on parameters of property transactions in major Hungarian cities given by Duna House branch offices and agents.



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## EXECUTIVE SUMMARY

### UNUSUALLY STRONG BUYER INTEREST ACCOMPANIED BY HIGH TRANSACTION VOLUMES IN NOVEMBER

Last month saw the domestic real estate market close its second strongest month in 2024 in terms of transaction numbers, with the Duna House Demand Index showing its strongest November ever, as evidenced by data available since 2010. According to the buyer demand index measured by the company, interest in real estate continued to increase: the November reading of 87 points was 8 points higher than the October figure. November was also a good month as far as transaction numbers are concerned, with Duna House estimating 11,277 sales, up 5% on the previous month and 28% better than in the same period last year. Our analysts expect this December to be more active than the traditional year-end slowdown, with the market set to close the year around the mid-point of the 110-130k annual range forecast at the beginning of the year. The mortgage market also boasts good results for the year, with Credipass, the international financial brand of the Duna House Group estimating that the volume of housing loans in Hungary could exceed HUF 1300 billion by the end of the year.

With the exception of brick and mortar homes in Buda, Duna House sales data show an increase in prices in all areas and for all property types across the country compared to the same period last year. In the Eastern part of Hungary, the average price paid for a concrete block unit increased to HUF 500,000 per sq. m., while in the Western regions it rose to HUF 546,000. In the case of concrete block homes in the capital, the price increase was milder on the Buda side and more pronounced on the Pest side: in Buda the price paid rose to HUF 922,000 per sq. m., while in the districts of Pest it was HUF 844,000. The price per sq. m. paid for brick and mortar apartments and houses in the country ranged between HUF 436,000 and HUF 462,000 in the period under review. In Budapest, brick and mortar homes in Buda that changed hands in November sold for an average of nearly HUF 1.2 million per sq. m., while in the centre and in other areas of Pest the average was HUF 994,000 per sq. m. and HUF 884,000 per sq. m., respectively.

In November a district not seen on the podium for a long time ranked third in popularity among the capital's districts, according to a survey by Duna House. District 14 (Zugló) made a big comeback with 18.6% of the preferences of clients planning to buy property in Budapest, while District 13 (21.4%) retained its leading position and District 11 (Újbuda, 19%) remained in second place.

In the capital, the most active buyer group was the 40-50 year olds, while almost a quarter of those employing the services of Duna House were aged 30-40. In line with last year's figures, 38% of buyers were making a property investment in November this year, 23% were moving into a larger home, while clients acquiring their first home accounted for 19% of all buyers. Investors spent HUF 60.5 million on residential property purchases in Budapest, while those moving into a larger property or buying their first home spent HUF 84.8 million and HUF 48.4 million, respectively. In the country, the 30-40 year olds had a stronger presence in the residential property market at 27%, and making a residential property investment was the leading motivation for rural buyers, too, while a quarter of buyers were signing a contract for their first home. On average, investors spent HUF 33 million, compared to HUF 37.7 million for a first home in the country.

Across the country, the majority of buyers were in the over-60 age group. The strongest motivation for selling in Budapest was cashing in on a previous investment with 30%, while 28% of sellers were parting with their previous home in order to move into a larger property. The sale of an inherited property accounted for 23% of all sales, while in the country the sale of an inheritance continued to lead the ranking (29%). 26% of cases were motivated by the sale of a property previously bought as an investment.

**Further information:**  
Szászi Roni • PR coordinator  
+36 30 811 0690  
szaszi.roni@dh.hu

**Duna House Holding Nyrt.**  
1016 Budapest Gellérthegy u. 17.  
+36 1 555 2222  
www.dh.hu

#### THREE INTERESTING FACTS

**November had never been so strong: the Duna House Demand Index stood at a remarkable 87 points.**

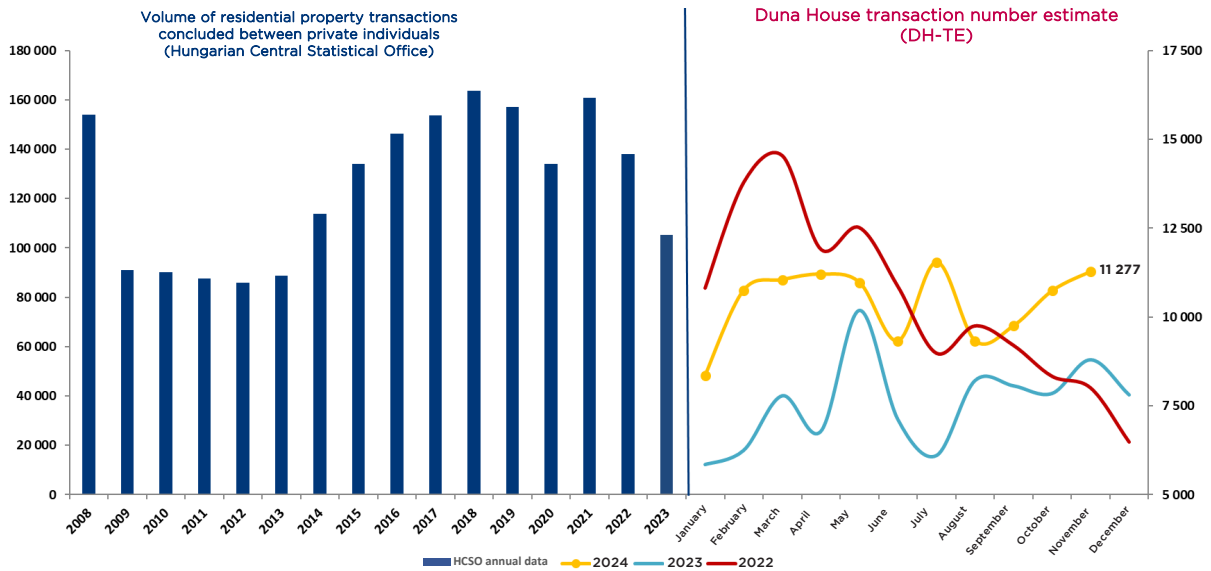
**Zugló became the third most popular district in the capital after a long time, with a share of 18.6%.**

**With 11,277 transactions the residential property market closed its second strongest month of the year in November.**

# TRANSACTION DATA

## DUNA HOUSE TRANSACTION NUMBER ESTIMATE (DH-TE)

The Duna House Group presents its monthly Transaction Number Estimate (DH-TE) and Mortgage Forecast below, showing that 11,277 residential property transactions were concluded in November 2024 and residential mortgage contracts worth HUF 100 billion were signed in the whole of Hungary.



The domestic housing market closed the second strongest month of 2024 in November. Duna House estimates that there were 11,277 transactions on the market, up 5% on the previous month and 28% better than the same period last year. The company estimates that July was the most active month of the year, with November only 2% behind. With no sign of a slowdown in buyer sentiment, property professionals expect December to be more active than the traditional year-end slowdown, ending the year around the mid-point of the 110-130k annual range forecast at the beginning of the year.

According to data from Credipass, the international financial brand of the Duna House Group in Hungary, the mortgage market saw HUF 100 billion in contracted residential mortgage loans this November. Although this represents a 15% decline compared to the October result estimated by Credipass, the segment still closed 49% stronger in November this year compared to the data published by MNB, the National Bank of Hungary for the same period last year.

THE TABLE BELOW SHOWS MONTHLY TRANSACTION VOLUME ESTIMATES OF DUNA HOUSE.

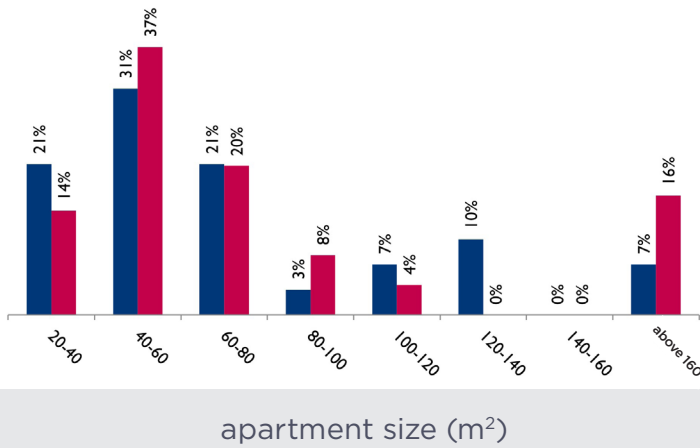
	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
2021	11 185	14 569	15 630	13 511	14 198	13 615	11 185	11 304	11 807	11 526	11 022	11 422
2022	10 815	13 793	14 548	11 911	12 519	10 859	8 978	9 748	9 200	8 326	8 000	6 474
2023	5 853	6 253	7 787	6 787	10 187	7 120	6 107	8 213	8 067	7 853	8 800	7 813
2024	8 354	10 754	11 046	11 200	10 969	9 323	11 538	9 323	9 754	10 738	11 277	-

**Methodology behind DH-TE:** Regardless of the time of year, the most important indicator of the real estate market is the annual number of sale transactions. The DH-TE figure is an estimate published by Duna House and it reflects interim approximate data. The estimate is based on the number of monthly property transactions brokered by Duna House and the estimated market share of Duna House. The estimate of the current monthly market share of Duna House is based on the following indicators: 1. Data published by the Hungarian Central Statistical Office on transactions among private individuals. Since the Statistical Office publishes data with several months' delay, market share can be adjusted retroactively which also results in a more accurate estimate as well. **Please note:** After 2016 and as a consequence of the boom in newly-built apartments, pre-contracted purchase transactions appear in the statistics of the Statistical Office with a delay of several months or even one or two years, after the capital transfer tax has been levied, which results in anomalies in the statistics. 2. The number of Energy Certificates issued; 3. Subjective assessment based on other management information from Duna House Holding. **Please also note** that DH-TE data cannot be used for defining the volume of transactions brokered by Duna House, or for estimating the business profit of Duna House Holding or for the drawing of any related conclusions. **Mortgage forecast:** Figures published Credipass can primarily be used for quick trend forecasts; the National Bank of Hungary publishes the actual figures for the second last month at the beginning of each month.

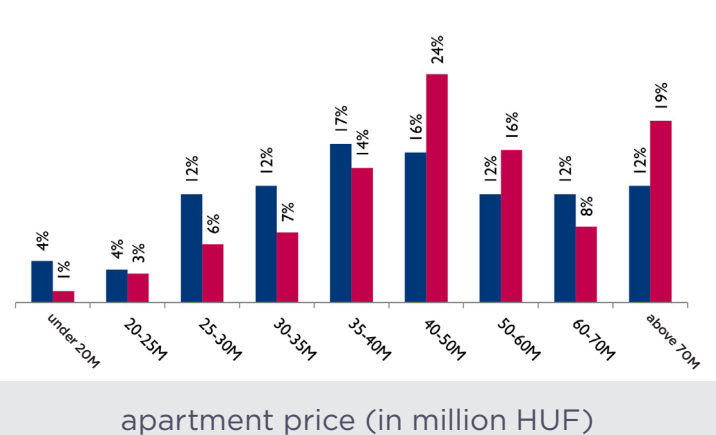
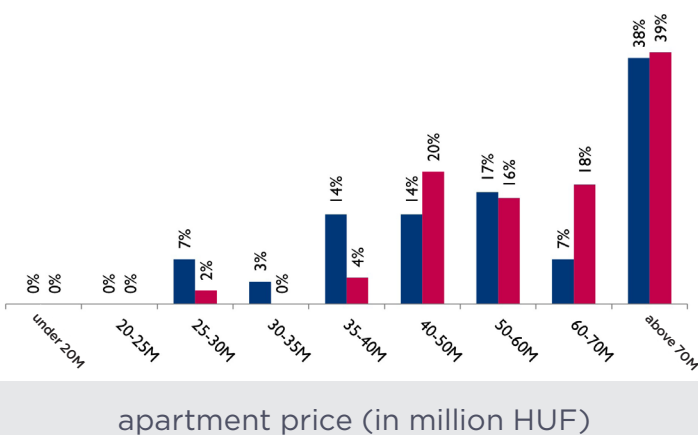
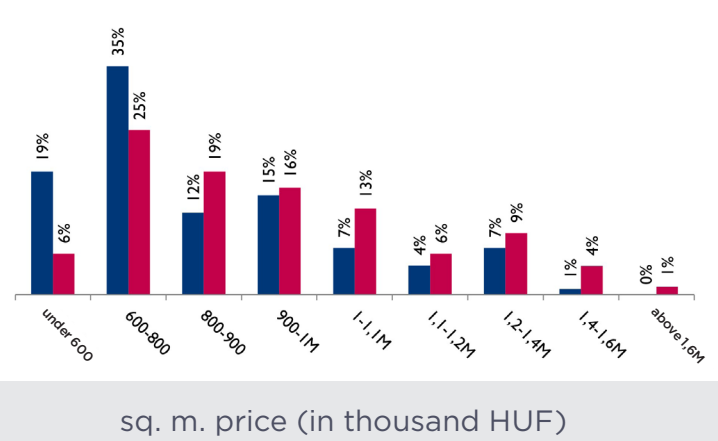
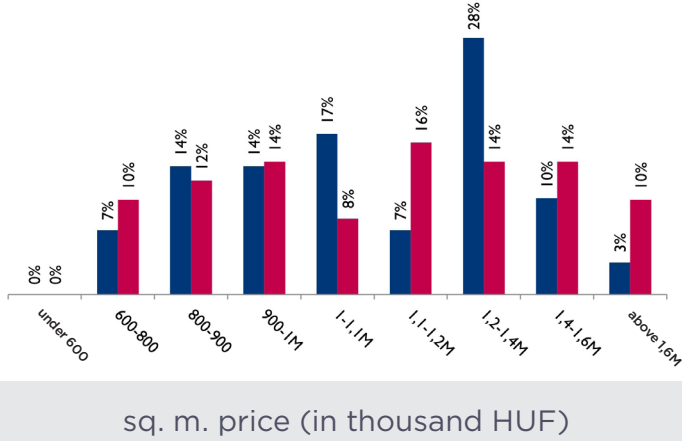
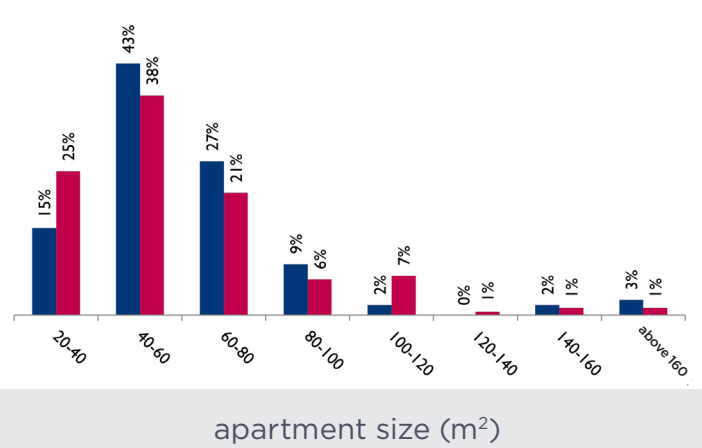
# TRANSACTION PARAMETERS IN BUDAPEST

According to the November sales data of Duna House, 37% of all transactions closed on the Buda side of the capital involved properties with a floor space between 40-60 sq. m. In 16% of all transactions, the price per sq. m. of the apartments sold was between HUF 1.1 and 1.2 million. 39% of homes sold in Buda last month found a new owner at prices north of HUF 70 million. In the Pest districts, Duna House clients were mainly looking for apartments between 40-60 sq. m. (38%) and 20-40 sq. m. (25%). The majority (25%) of apartments changed hands at prices between HUF 600-800 thousand per sq. m. Nearly a quarter of the transactions closed at a purchase price between HUF 40-50 million.

## BUDA



## PEST



■ November 2023 ■ November 2024

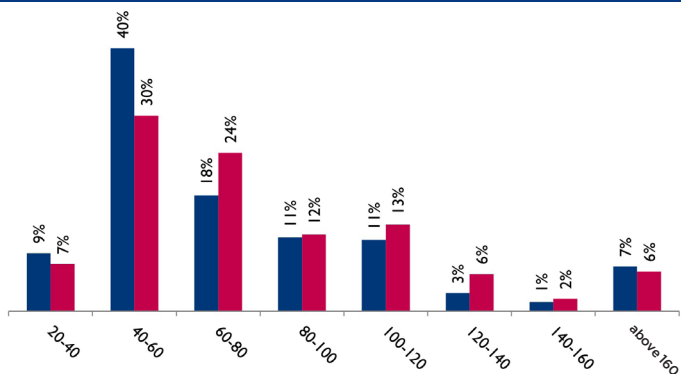
Based on properties sold by Duna House Franchise Network.

# TRANSACTION PARAMETERS IN THE COUNTRY

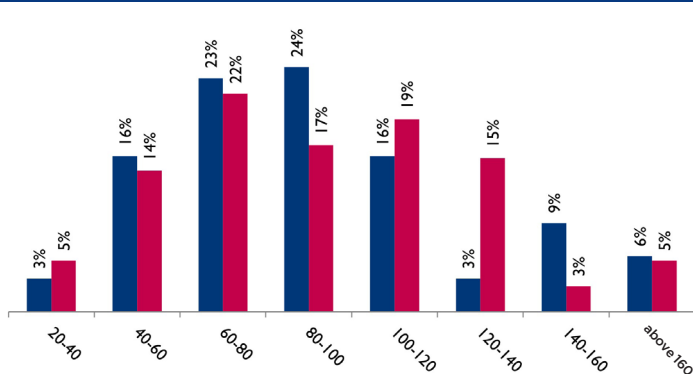
As far as the entire country is concerned, with the exception of Central Hungary, 30% of transactions were for homes between 40-60 sq. m. In terms of sq. m. prices, the category under HUF 250,000 dominated with a 28% share, with almost a quarter of sales closing at prices above HUF 40 million. Duna House experts found the highest demand for properties with a floor space between 60-80 sq. m. in County Pest. 40% of houses and flats sold at prices exceeding HUF 600,000 per sq. m., while 36% of properties were bought for more than HUF 50 million in November this year.

## COUNTRYWIDE (EXCLUDING CENTRAL HUNGARY)

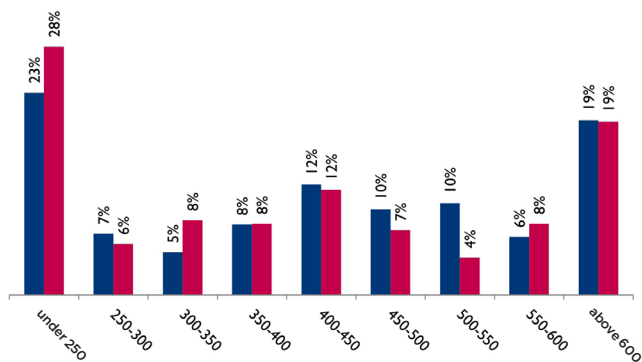
## COUNTY PEST



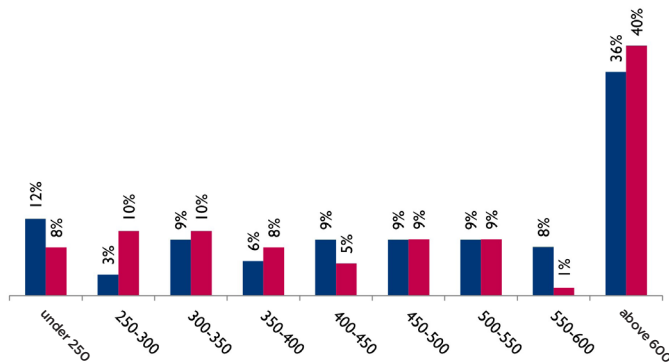
apartment size (m<sup>2</sup>)



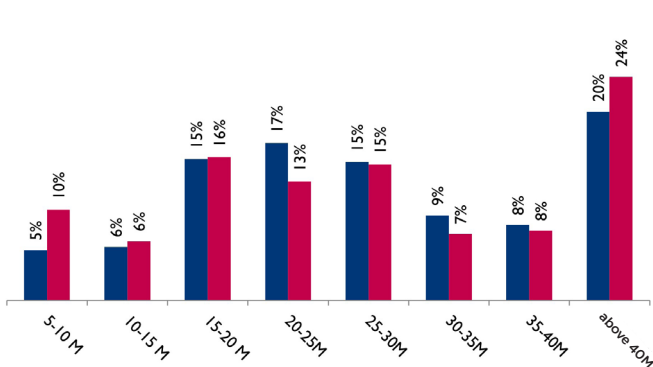
apartment size (m<sup>2</sup>)



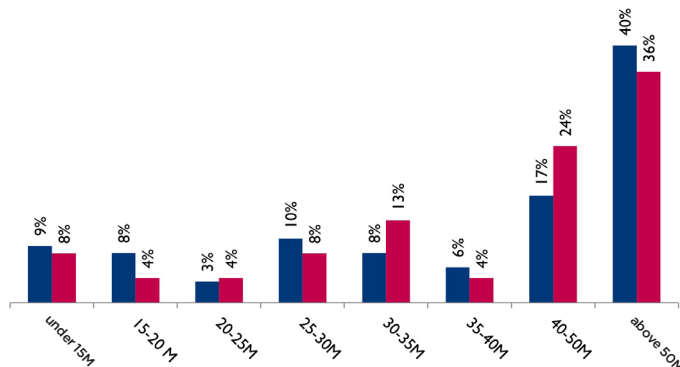
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

■ November 2023 ■ November 2024

Based on properties sold by Duna House Franchise Network.

## SALES DATA - PRICES - BARGAINING MARGINS

Compared to the same period of the previous year, Duna House sales data show an increase in prices in all areas and for all property types across the country, except for brick and mortar properties in Buda. After a slight increase in the price of concrete block apartments in the country, the average price paid for these units rose to HUF 500,000 per sq. m. in the East and HUF 546,000 in the West. Owners tended to reduce their asking prices during the advertising process by 2-3%, while the bargaining margin was 4-5%. The average price per sq. m. of brick and mortar apartments and houses in Western and Eastern Hungary was around HUF 436-462 thousand in November 2024. Sellers cut the target price of brick and mortar homes in the country by 4-5%, leaving even more room for bargaining at 7-8%.

### PANEL: COUNTRYWIDE

	EAST				WEST			
	price	m <sup>2</sup> price	change in listing price	bargain	price	m <sup>2</sup> price	change in listing price	bargain
<b>November 2023</b>	24 892 000	484 000	4%	4%	25 678 000	490 000	5%	5%
<b>November 2024</b>	30 992 000	500 000	3%	5%	28 107 000	546 000	2%	4%

### BRICK: COUNTRYWIDE

	EAST				WEST			
	price	m <sup>2</sup> price	change in listing price	bargain	price	m <sup>2</sup> price	change in listing price	bargain
<b>November 2023</b>	32 910 000	371 000	5%	9%	31 769 000	382 000	7%	8%
<b>November 2024</b>	37 030 000	462 000	4%	8%	33 170 000	436 000	5%	7%

This time, the price increase for concrete block homes in the capital was milder on the Buda side and more pronounced on the Pest side: in Buda the price paid for these homes rose to HUF 922,000 per sq. m., while in the districts of Pest it was HUF 844,000. During the advertising process, owners reduced the asking price by 1-3% only, and also left little room for bargaining at a mere 2-3%. Brick and mortar apartments in Buda that changed hands in November sold at an average price of nearly HUF 1.2 million per sq. m., while the average price in the centre of Pest was HUF 994,000 and HUF 884,000 per sq. m. elsewhere. Sellers softened their advertising prices by 3-5% and there was also a 3-4% margin for buyer bargaining.

### PANEL: BUDAPEST

	EAST				WEST			
	price	m <sup>2</sup> price	change in listing price	bargain	price	m <sup>2</sup> price	change in listing price	bargain
<b>November 2023</b>	46 267 000	868 000	2%	3%	38 503 000	681 000	4%	4%
<b>November 2024</b>	48 008 000	922 000	3%	2%	44 936 000	844 000	1%	3%

### BRICK: BUDAPEST

	BUDA				PEST				INNER CITY			
	price	m <sup>2</sup> price	change in listing price	bargain	price	m <sup>2</sup> price	change in listing price	bargain	price	m <sup>2</sup> price	change in listing price	bargain
<b>November 2023</b>	86 309 000	1 261 000	4%	5%	51 888 000	797 000	6%	5%	58 811 000	896 000	5%	5%
<b>November 2024</b>	110 333 000	1 194 000	4%	4%	52 559 000	884 000	3%	3%	54 271 000	994 000	5%	4%

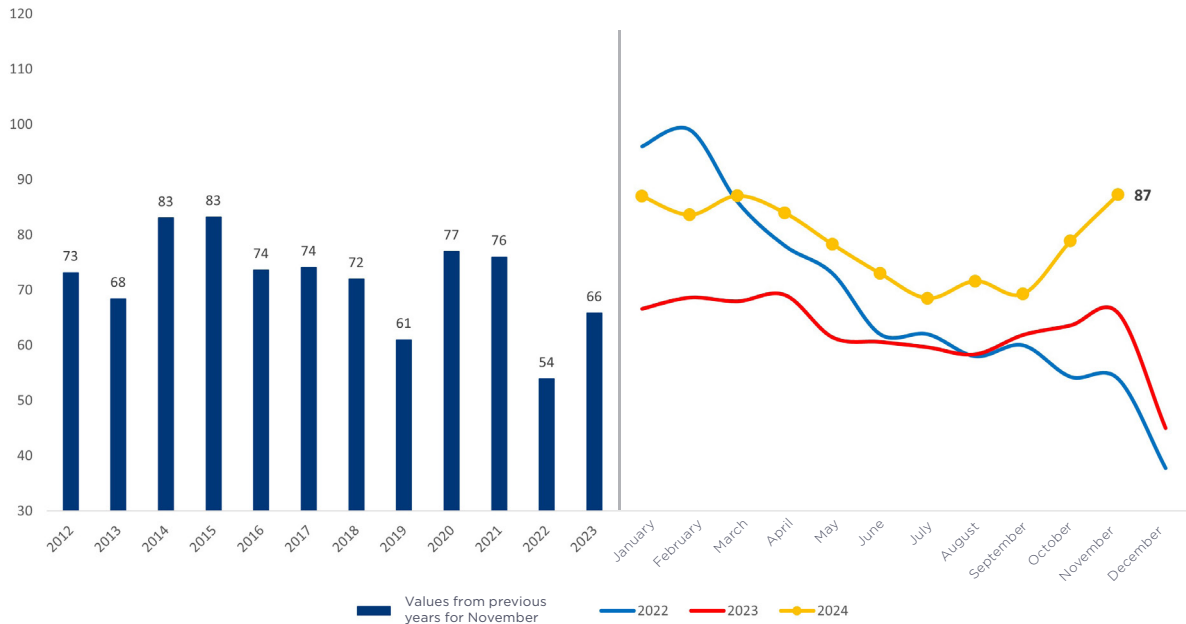
Based on purchase prices of the given period of properties brokered by Duna House.

**Methodology:** Change in the listing price is the difference between the first price indicated by the seller in the Duna House assignment and the last registered price at the time of the appearance of the buyer. Bargain shows additional changes in the price agreed upon by the seller and buyer. The two indicators together give a good picture of the difference in price between the original idea of the seller and the actual final price.



# BUYERS - DEMAND INDEX

According to the buyer demand index measured by Duna House, the Hungarian real estate market was again very active in November. The 87 points recorded in the month were 8 points higher than in October, making this the strongest November ever for the segment, based on data collected by Duna House since 2010.



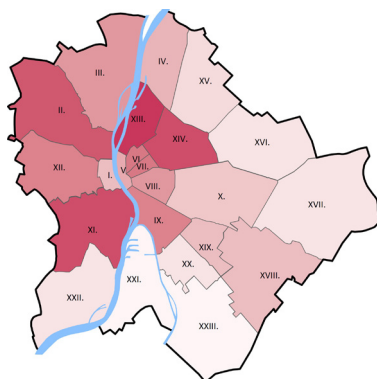
**Methodology behind Demand Index:** The basis of the estimate is the activity registered by our agents in various, mainly major cities and Duna House offices. Corrections are made depending on the number of active agents and working days. The Demand Index is an important indication of buyer side's reactions to political decision or solutions offered by the financial sector. Demand Index is a quantitative indicator which has no direct connection with the realized or future transaction numbers. The latter is a qualitative issue highly affected by market environment and available financial product.

## DEMAND FOR INDIVIDUAL DISTRICTS

According to the Duna House popularity survey of the capital's districts, District 13 retained its leading position in November 2024. 21.4% of clients planning to buy a property in Budapest indicated the district as their preferred location. District 11 (Újbuda) remained in second place (19%), but unlike in recent months, District 14 (Zugló), not a Buda district or even a downtown district, came in third with a popularity of 18.6% among respondents.

DISTRICT	NOVEMBER 2023	NOVEMBER 2024
Bp. 01.	8,6%	8,4%
Bp. 02.	17,7%	18,2%
Bp. 03.	14,1%	12,5%
Bp. 04.	7,6%	9,4%
Bp. 05.	10,2%	10,7%
Bp. 06.	15,7%	15,6%
Bp. 07.	15,7%	15,8%
Bp. 08.	11,5%	12,9%
Bp. 09.	11,5%	14,9%
Bp. 10.	5,0%	8,3%
Bp. 11.	16,7%	19,0%
Bp. 12.	12,3%	14,4%
Bp. 13.	17,4%	21,4%
Bp. 14.	14,2%	18,6%
Bp. 15.	6,6%	6,5%
Bp. 16.	6,7%	5,5%
Bp. 17.	4,3%	4,9%
Bp. 18.	8,0%	8,8%
Bp. 19.	5,8%	8,5%
Bp. 20.	5,1%	5,4%
Bp. 21.	2,7%	3,2%
Bp. 22.	4,1%	5,3%
Bp. 23.	2,3%	1,9%

### INTEREST TOWARD THE DISTRICTS IN BUDAPEST:

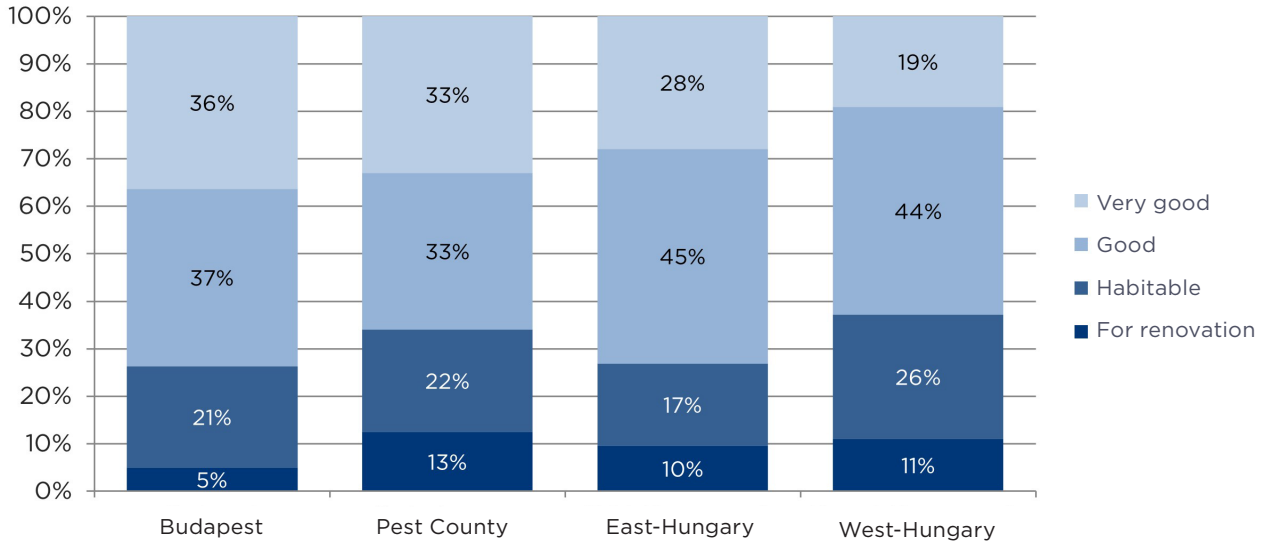


**Methodology:** Our clients with a purchase intention indicate their preferred districts (more at the same time) when meeting our agents. The above preference map is put together based on this "popularity information".

Data is analysed based on real estate transactions brokered by Duna House. The territorial distribution of DH transactions may differ from the territorial distribution of the market as a whole. Duna House Holding pursues its real estate agency activities mainly in Budapest and in major cities. Duna House Holding does not make corrections in view of the differences in territorial distribution between its own transactions and of the market in general.

## QUALITY PREFERENCES

According to data released by Duna House in November 2024, properties in a good condition were the most popular choice across the country (33-45%). In the capital, the 'very good' category was also popular, with only one percentage point fewer people signing contracts for these apartments, while in County Pest both quality categories were equally sought after. Propensity to renovate was lowest in Budapest, at 5%, while 10-11% of sales in Eastern and Western Hungary included a home in need of a complete renovation. The proportion of homes requiring an overhaul was highest in County Pest, at 13%.



## TURNOVER SPEED (TIME NEEDED TO SELL)

According to Duna House data for November, the sale of concrete block flats in Budapest took the shortest time, two months on average, while the average time to sell a similar unit in Buda was 2.5 months. In the country, it took more, an average of 3 months to sell these apartments. The sale of brick and mortar apartments and houses in the capital took an average of 4 months, as evidenced by Duna House transaction data, while in the country it took slightly longer to close a successful deal.

PANEL				
TIME NEED OF SALE (DAY)				
	EAST	WEST	BUDA	PEST
November 2023	92	97	112	113
November 2024	96	95	80	65

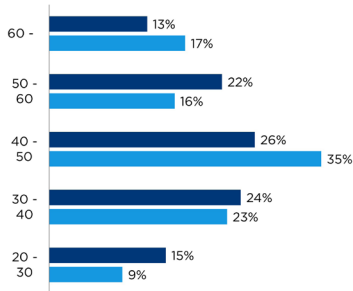
BRICK					
TIME NEED OF SALE (DAY)					
	EAST	WEST	BUDA	PEST	INNER CITY
November 2023	144	127	129	129	139
November 2024	130	133	125	131	115

Data is assessed based on real estate sold by Duna House. Territorial distribution of transactions brokered by Duna House may differ from the territorial distribution of the market in whole. Duna House Holding carries out its real estate agency activities mainly in Budapest and major cities. Duna House Holding does not make corrections in relation of the territorial distribution of own and market transactions.

# BUYER PROFILE IN BUDAPEST

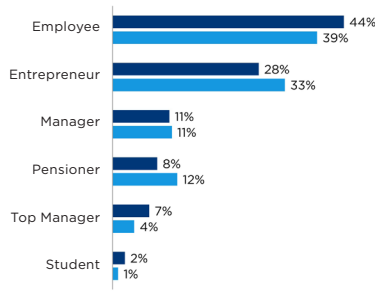
An analysis of the buy-side data of the November transactions in the capital, completed with the assistance of Duna House, shows that the most active group of buyers was still the 40-50 year olds with a share of 26%, while those between 30-40 years of age had a share of 24%. The majority (44%) of buyers were employees. In line with last year's figures, 38% of buyers were making an investment this November, 23% of buyers were moving into a larger home, while first-time buyers had a share of 19%. Investors and those moving into a larger home spent HUF 60.5 million and HUF 84.8 million on their purchases in the capital, respectively, while those buying their first home spent HUF 48.4 million.

## BUYERS' AGE IN BUDAPEST



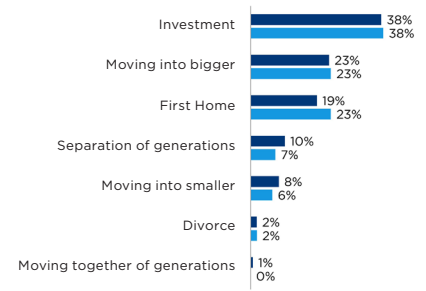
AGE	AVERAGE PRICE	m <sup>2</sup>
20 - 30	50 218 000	59
30 - 40	67 828 000	75
40 - 50	60 679 000	62
50 - 60	68 178 000	59
60 -	68 279 000	61

## BUYERS' STATUS IN BUDAPEST



STATUS	AVERAGE PRICE	m <sup>2</sup>
Employee	55 176 000	59
Top Manager	115 672 000	85
Manager	51 550 000	58
Pensioner	54 310 000	53
Student	59 167 000	64
Entrepreneur	72 550 000	74

## MOTIVATION IN BUDAPEST

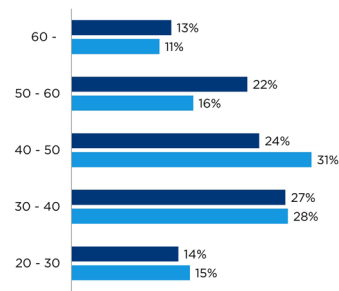


SITUATION	AVERAGE PRICE	m <sup>2</sup>
Investment	60 530 000	58
First Home	48 463 000	56
Separation of generations	52 492 000	50
Moving together of generations	71 000 000	72
Moving into smaller	78 600 000	68
Moving into bigger	84 834 000	87
Divorce	30 800 000	31

# BUYER PROFILE IN THE COUNTRY

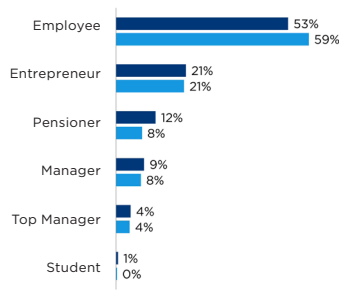
In November 2024, 27% of property buyers in the country were in the 30-40 age group, and more than half (53%) of them were employees. The largest proportion (30%) of sales were for investment purposes, while a quarter of buyers were acquiring their first home. Investors spent an average of HUF 33 million, while buyers in the country spent more than that, HUF 37.7 million, on their first home.

## BUYERS' AGE IN THE COUNTRY



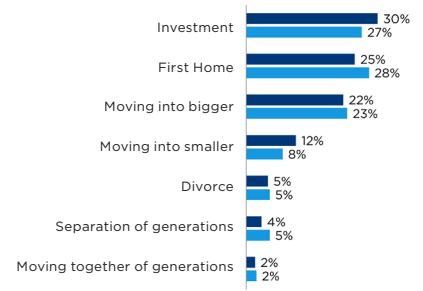
AGE	AVERAGE PRICE	m <sup>2</sup>
20 - 30	37 734 000	80
30 - 40	45 853 000	89
40 - 50	45 777 000	86
50 - 60	40 139 000	75
60 -	37 773 000	72

## BUYERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	m <sup>2</sup>
Employee	34 790 000	81
Top Manager	65 836 000	82
Manager	45 308 000	89
Pensioner	38 544 000	74
Student	16 000 000	42
Entrepreneur	53 888 000	87

## MOTIVATION IN THE COUNTRY



SITUATION	AVERAGE PRICE	m <sup>2</sup>
Investment	33 040 000	68
First Home	37 750 000	82
Separation of generations	32 250 000	56
Moving together of generations	61 500 000	104
Moving into smaller	34 863 000	61
Moving into bigger	60 067 000	119
Divorce	47 500 000	81

■ November 2023 ■ November 2024

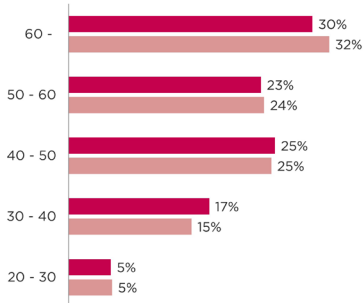
Under our methodology investment as a motivation includes all property transactions that, judged by the buyer's characteristics, can be considered as an investment, i.e. this is not a strictly business category. It includes all family investments and short-term investors who buy a property in a poor state of repair, renovate it and sell it on immediately. These latter buyers have a favourable effect on improving the overall state of repair of the existing pool of properties and are, in view of current construction industry and property market conditions, performing a welcome activity.

Data presented above relating to age, status and reason of purchase have been acquired through voluntary declarations of our clients. Therefore, they qualify as a sample and are regarded as estimates.

## SELLER PROFILE IN BUDAPEST

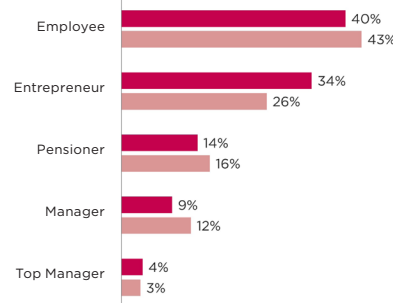
According to November 2024 sales data, 30% of transactions in the capital were made by people over 60 years old and 40% of all sellers were employees. The strongest seller motivation in Budapest with a share of 30% was selling a previous investment, while 28% of sellers were parting with their previous home to move into a larger property. Selling an inherited property accounted for 23% of sales in November 2024.

### SELLERS' AGE BUDAPEST



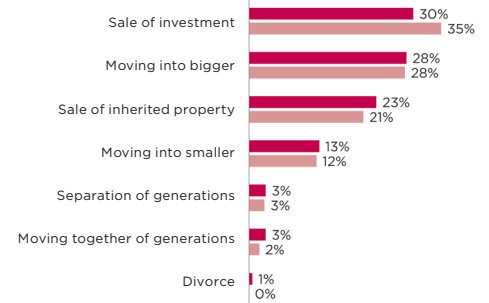
AGE	AVERAGE PRICE	m <sup>2</sup>
20 - 30	87 614 000	78
30 - 40	58 228 000	58
40 - 50	76 669 000	67
50 - 60	57 952 000	62
60 -	59 300 000	67

### SELLERS' STATUS BUDAPEST



STATUS	AVERAGE PRICE	m <sup>2</sup>
Employee	48 652 000	54
Top Manager	62 580 000	66
Manager	56 196 000	56
Pensioner	62 376 000	72
Entrepreneur	84 929 000	74

### MOTIVATION BUDAPEST

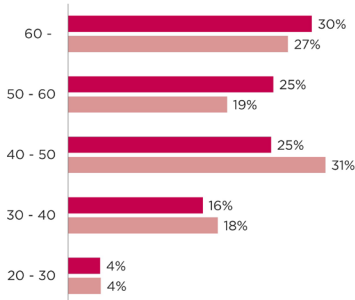


SITUATION	AVERAGE PRICE	m <sup>2</sup>
Sale of investment	69 264 000	69
Separation of generations	61 500 000	72
Moving together of generations	52 400 000	55
Moving into smaller	72 189 000	81
Moving into bigger	51 078 000	49
Sale of inherited property	74 627 000	77
Divorce	27 000 000	35

## SELLER PROFILE IN THE COUNTRY

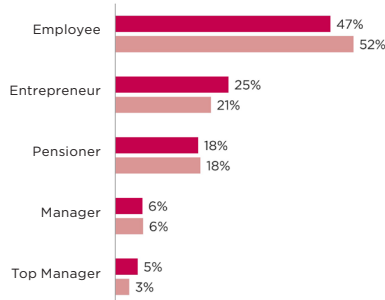
According to sales data collected by Duna House in November this year, 30% of sellers were aged over 60, as in the capital, while 25% were aged between 50 and 60. 47% of those selling a residential property were employees and 25% were self-employed. In the country, the sale of an inherited property continued to lead the ranking (29%), while in 26% of cases the motivation was the sale of a property previously bought as an investment.

### SELLERS' AGE IN THE COUNTRY



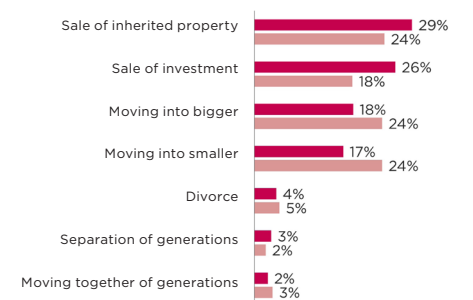
AGE	AVERAGE PRICE	m <sup>2</sup>
20 - 30	32 494 000	81
30 - 40	33 677 000	72
40 - 50	39 588 000	74
50 - 60	47 384 000	94
60 -	38 820 000	81

### SELLERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	m <sup>2</sup>
Employee	35 092 000	80
Top Manager	52 336 000	99
Manager	45 142 000	89
Pensioner	34 773 000	69
Entrepreneur	57 544 000	93

### MOTIVATION IN THE COUNTRY



SITUATION	AVERAGE PRICE	m <sup>2</sup>
Sale of investment	47 842 000	70
Separation of generations	58 049 000	97
Moving together of generations	42 150 000	65
Moving into smaller	51 403 000	106
Moving into bigger	39 532 000	73
Sale of inherited property	30 198 000	79
Divorce	50 131 000	140

■ November 2023 ■ November 2024

In seller profile data analysis an updated methodology has been introduced, which partly explains the significant change in the "sale of a property investment" row in recent months.

An overhead photograph of a meeting table. On the left, a person in a grey suit is seated. In the center, a woman in a white blazer is looking at a laptop. On the right, another person in a white blazer is looking at a smartphone. The table is cluttered with papers, a laptop, a tablet, a ruler, and a pen. The background is a light-colored wall.

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