

2016 CHINA

中国饭店业务统计 HOTEL INDUSTRY STUDY

2015 财政年度 FINANCIAL YEAR 2015



中国旅游饭店业协会
China Tourist Hotel Association



Horwath HTL 浩华

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5-Star Hotels in Tertiary Cities Showed Moderate Decrease in GOP Ratio. Because oversupply continued troubling tertiary cities, with increasing operational expenses, 5-star hotels in tertiary cities observed a significant decrease in GOP PAR levels by 13%, resulting in a Y-o-Y drop of 2.7 percentage points in GOP Ratio.

China Resort Market Overview

The last 5 years have seen substantial tourism real estate developments by Chinese investors. International brands have entered major tourism and vacation destinations from Heilongjiang to Hainan. The boom in resort and tourism developments to a great extent reflects the increasing leisure demand of Chinese households. With rising income levels, people are seeking chances to get away from the increasing stress of city lives. To reflect the new hot area of investment and development, we have analyzed China's 5-star Resort market performance. The nearly 80 resorts included in the analysis covered the suburban resorts in or around primary and secondary cities and resorts within famous vacation destinations such as Jiuzhai, Lijiang, Si Changbai Mountain, and Thousand Island Lake.

Exhibit 1: Geographical Distribution of Sample 5-Star Resorts



To better illustrate the overall performance of China's 5-star resorts, a comparison of 5-star city hotel category is presented as follows:

Exhibit 2: General Indicator Comparison, 5-Star Resorts VS. 5-Star Hotels (RMB)

Indicators	5-Star Resorts	5-Star Hotels
Occupancy	50%	58%
ADR	966	774
RevPAR	488	446
Total Revenue PAR	281,884	304,829
GOP PAR	80,390	94,041
GOP (% Total Revenue)	29%	31%

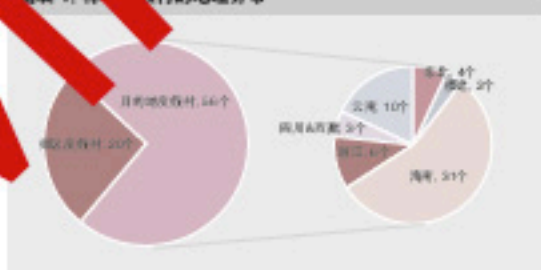
Overall, China's 5-star resorts achieved higher RevPAR than China's 5-star city hotels in 2015 as a result of much higher ADR levels. However, this sector's total revenue and GOP were lower than 5-star city hotels. On one hand, the strong demand seasonal

三线城市五星酒店的经营毛利率适度下滑仍较为明显。饱受供给过剩之困扰，加上运营成本的不增长，三线城市五星酒店的每间可供出租客房经营毛利同比上年大幅下滑了13%，经营毛利率也同比下降了2.7个百分点。

中国度假酒店市场概况

过去五年，中国投资商投资开发了大量度假项目。从黑龙江到海南岛，中国各主要旅游和度假目的地随处可见国际酒店品牌的身影。度假和旅游项目的蓬勃发展在很大程度上反映了中国家庭休闲旅游需求持续增长的态势。随着收入水平的不断上升，人们纷纷寻找机会走出家门，以期缓解快速提高日益加重的都市生活压力。为了反映这一新的投资热点，我们分析了中国五星度假酒店市场的整体表现与经营特征。本次分析包含近80家度假酒店涵盖了中国的一、二线城市周边的郊区度假项目以及位于知名旅游目的地的度假项目，诸如九寨沟、丽江、长白山和千岛湖等。

图表 1: 样本五星度假村的地理分布



为了更好地体现中国五星度假酒店的整体业绩水平，下表将对五星度假城市酒店的业绩表现进行说明：

图表 2: 五星度假酒店相对于五星城市酒店，综合业绩指标比较，2015年(人民币元)

指标	五星度假酒店	五星城市酒店
住宿率	50%	58%
平均房价	966	774
平均每间房收益	488	446
每间可供出租客房总收入	281,884	304,829
每间可供出租客房经营毛利	80,390	94,041
经营毛利率(占总收入的比例)	29%	31%

总体而言，得益于其优异的平均房价表现，中国五星度假酒店实现的平均每间房收益高于五星城市酒店，但前者在每间可供出租客房总收入和经营毛利这两项指标上均逊色于后者。一方面，需求的显著季节性波动和较为疲软的餐饮业绩制约了中国五星度假酒店的整体创收能力；另一方面，其运营成本和未分配经营开支未能根据住