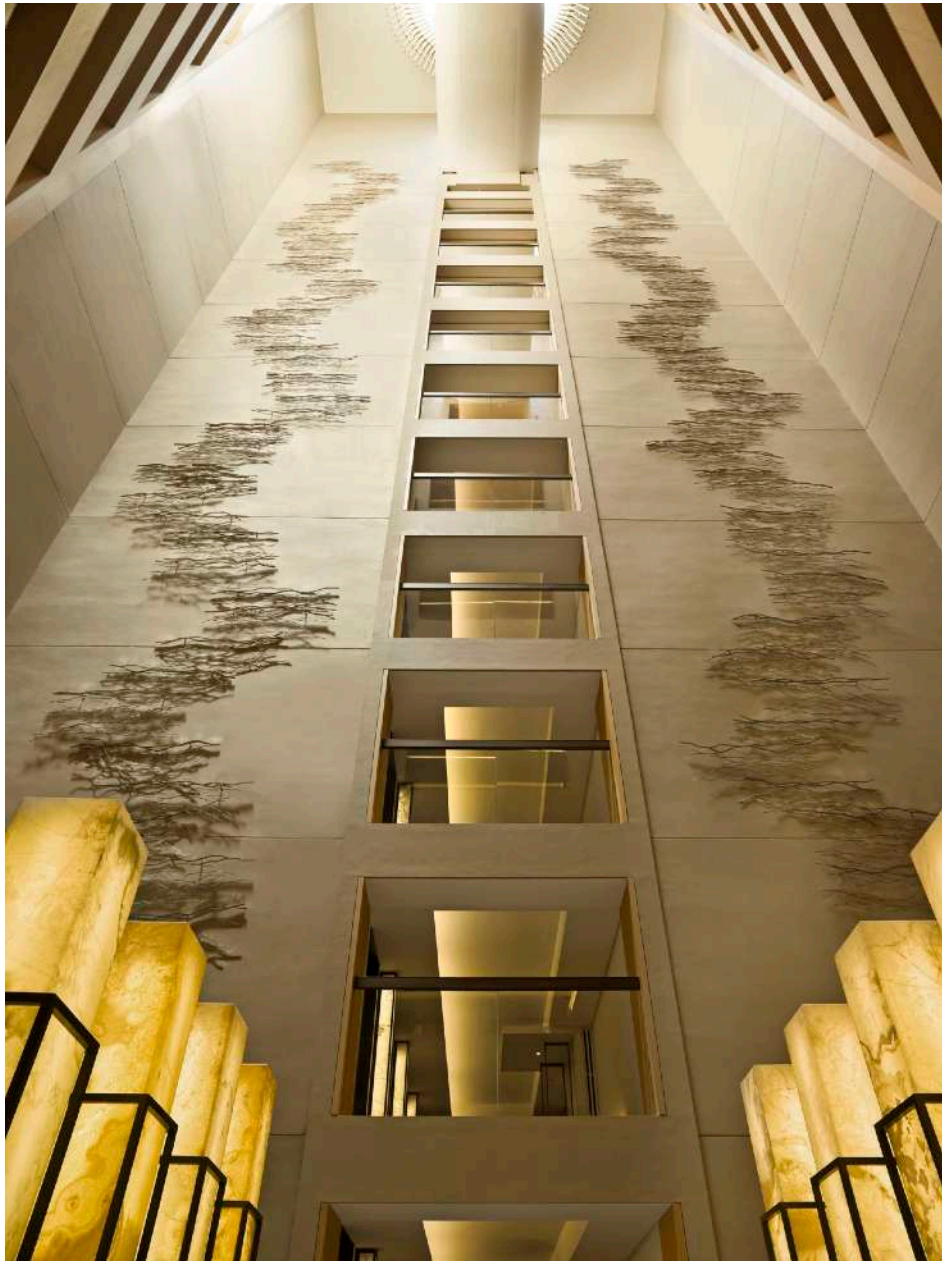


# Summary of the Hong Kong Hotel Industry Review 2018

## 2018年香港酒店業回顧－概覽



百年浩華 不忘初心 再譜華章  
Celebrating 100 years

本刊是香港酒店業第32份報告，由香港旅遊發展局及浩華管理顧問公司（Horwath HTL）共同編製，並由香港酒店業協會（HKHA）以及 Hotels Controllers & Accountants Association of Hong Kong（HCAA）協助。本報告將就財務、營運及市場資訊提供詳細的資料，資料來源是由參予此項研究並分佈在全港的103間酒店提供。報告中所有統計表的金額，均以港元為計算單位。

香港旅遊發展局及浩華管理顧問公司無意為香港酒店業制訂或統一價格，甚至確認酒店的業績。本報告所載的歷史數據和比率純粹作為比較的參考指引，並非任何類別酒店的既定標準。

本報告採用的數字均為算術平均數或加權平均數。由於部分酒店並未提供齊備的資料，故此每個項目均須獨立分析，而個別項目的平均數則乃根據該項目所得資料的計算。

相片由香港海洋公園萬豪酒店、香港沙田凱悅酒店、香港文華東方酒店、中環·石板街酒店和奕居提供。

This is the 32nd edition of the Hong Kong Hotel Industry Report, jointly produced by the Hong Kong Tourism Board (HKTb) and Horwath HTL (Horwath HTL), and supported by the Hong Kong Hotels Association (HKHA) and the Hotel Controllers & Accountants Association of Hong Kong (HCAA). This report presents detailed financial, operational and marketing information from 103 hotels located throughout Hong Kong. All tables found in this report are presented in Hong Kong Dollars.

The HKTb and Horwath HTL make no attempt to set or conform prices, or operating results for the Hong Kong hotel industry. The amounts and ratios in this report are past data and should not be considered standards for any type of property, but rather to serve as guidelines for comparison purposes.

All of the figures used in this report are arithmetic or weighted means. Since some hotels did not provide information for each category, it has been analyzed separately and the means are based on the information submitted for that category only.

Courtesy of photo from Hong Kong Ocean Park Marriott Hotel, Hyatt Regency Hong Kong, Sha Tin, Mandarin Oriental, Hong Kong, The Pottinger Hong Kong and The Upper House.

## 業務表現

## Performance Highlights

2018年的全港酒店的平均入住率為91%，較2017年提升了2個百分點。住宿需求的穩定上升使入住率再創新高。

The average Hong Kong hotel market occupancy in 2018 was 91%, 2 percentage points higher than 2017. The solid demand growth drove record-high occupancy for Hong Kong.

2018年訪港旅客與過夜旅客人次保持增長，分別錄得11.4%及4.9%的升幅。全年過夜旅客達到2,926萬人次。

The total visitor arrivals and overnight visitors in Hong Kong continued to grow in 2018, with an increase of 11.4% and 4.9% respectively. The overnight visitor arrivals reached 29.26 million.

2018年全港酒店平均房價水平達到1,376港元，較2017年上升6.8%。當中以平均房價等於或低於950港元類別酒店的房租水平增幅最大。但全港酒店的平均房價仍比近十年來的最高點（2012年，1,489港元）低7.6%。

The average room rate was HK\$1,376 in 2018, an increase of 6.8% compared to 2017. Hotels in the HK\$950 and below segment achieved the strongest growth. However, the average room rate of all hotels is still lower than the highest point in the past decade (2012, HK\$1,489) by 7.6%.

在客房部門方面，平均每間可供出租房間的客房收入顯著上升12.7%，支出則增加9.1%。這導致客房部門利潤率上升0.7個百分點，平均每間可供出租房間的利潤上升13.8%。

For the rooms department, revenues per available room showed a significant increase of 12.7%, and expenses per available room increased by 9.1%. This led to an increase in rooms departmental profit margin of 0.7 percentage point and an increase of 13.8% in rooms departmental profit per available room.

平均每間可供出租房間的餐飲收入與2017年相比上升10.7%，開支上升12.4%。餐飲部門平均每間可供出租房間的利潤則上升了7.0%。

Food and beverage revenues per available room increased by 10.7% compared to 2017, coupled with an increase of 12.4% in expenses. Food and beverage profits per available room had an increase of 7.0%.

在未分配經營開支方面，按每間可供出租房間計算，所有成本均錄得不同幅度的上升。升幅最大為資訊與通信系統，按年上升26.3%，依次為行政及一般開支（16.4%），工程維修部（12.7%），市場及營銷（10.3%）和能源成本（5.8%）。

For undistributed operating expenses per available room, all expenses experienced a rising trend. Information and Telecommunication Systems expenses recorded the highest year-on-year increase of 26.3%, followed by Administrative and General (16.4%), Property Operation and Maintenance (12.7%), Sales and Marketing (10.3%) and Utilities Expenses (5.8%).

直接散客仍是最大需求來源，它的市場佔比為39.8%。第二大市場為分銷/包價散客，佔比達20.9%。旅遊團隊出現下滑，其佔比由2017年的9.1%下降到8.0%。商務團隊則由3.1%增加至4.4%。

Direct FIT remained the largest source of demand, accounting for 39.8% of total demand. The second largest market segment was Wholesale/Package FIT, accounting for 20.9%. Leisure Group slightly declined, whose market share decreased from 9.1% in 2017 to 8.0% in 2018. Corporate Group increased from 3.1% to 4.4%.

# 2018 年香港酒店業概覽

## Hong Kong Hotel Industry Summary 2018

		所有酒店 All Hotels	HKD 2,351 and above	HKD 1,651 - HKD 2,350	HKD 951 - HKD 1,650	HKD 950 and below
參與本調查的酒店數目	Number of Participating Hotels	103	9	21	43	30
每日可供出租房間數目	Number of Rooms Available per Day	36,963	3,277	8,288	14,180	11,218
酒店入住率 (%)	Hotel Occupancy (%)	91%*	85%	88%	89%	92%
平均每日房租 (港元)	Average Daily Rooms Rates (HK\$)	1,376*	3,603	1,956	1,331	823
<b>每一可供出租房間數額 (港元) Amount Per Available Room (HK\$)</b>						
<b>分部門收入</b>	<b>Department Revenues</b>					
客房	Rooms	492,256	1,118,207	644,218	434,860	275,413
餐飲	Food & Beverage	239,755	970,438	345,685	173,658	60,830
SPA及健康中心	Spa / Health Club	4,246	34,585	1,293	2,142	263
其他營業部門收入 (包括停車場收入)	Other Operating Dept. (including Parking)	9,795	50,737	6,356	5,770	2,844
雜項收入	Miscellaneous Income	11,167	58,253	14,097	5,929	3,089
<b>分部門收入合計</b>	<b>Total Departmental Revenues</b>	<b>757,220</b>	<b>2,232,220</b>	<b>1,011,649</b>	<b>622,360</b>	<b>342,439</b>
<b>分部門支出</b>	<b>Department Expenses</b>					
客房	Rooms	111,086	222,029	144,888	100,903	67,887
餐飲	Food & Beverage	164,147	607,861	238,087	110,436	49,493
SPA及健康中心	Spa / Health Club	3,789	26,967	1,570	2,149	344
其他營業部門收入 (包括停車場收入)	Other Operating Dept. (including Parking)	7,800	41,329	6,464	5,224	1,995
<b>分部門支出合計</b>	<b>Total Departmental Expenses</b>	<b>286,822</b>	<b>898,186</b>	<b>391,009</b>	<b>218,713</b>	<b>119,719</b>
<b>分部門利潤合計</b>	<b>Total Departmental Profit</b>	<b>470,397</b>	<b>1,334,035</b>	<b>620,640</b>	<b>403,647</b>	<b>222,720</b>
<b>未分配經營開支</b>	<b>Undistributed Operating Expenses</b>					
行政及一般開支	Administrative & General	45,386	116,603	57,488	38,117	25,345
信息與通信系統	Information & Telecommunications Systems	6,359	20,816	10,700	4,024	1,943
市場及營銷	Sales & Marketing	33,554	110,484	45,616	25,753	12,395
工程維修部	Property Operation & Maintenance	26,971	66,054	32,915	23,406	15,838
能源	Utility	25,716	52,873	33,165	21,709	17,505
<b>未分配經營開支合計</b>	<b>Total Undistributed Operating Expenses</b>	<b>137,986</b>	<b>366,830</b>	<b>179,885</b>	<b>113,010</b>	<b>73,026</b>
<b>營運毛利潤</b>	<b>Gross Operating Profit</b>	<b>332,411</b>	<b>967,204</b>	<b>440,755</b>	<b>290,637</b>	<b>149,695</b>
管理費 (基本數及獎金)	Management Fees [Base & Incentive]	30,625	140,744	43,846	16,514	6,715
<b>除去固定費用前之收益</b>	<b>Income Before Fixed Charges</b>	<b>301,786</b>	<b>826,460</b>	<b>396,910</b>	<b>274,123</b>	<b>142,979</b>
固定費用	Fixed Charges	41,881	95,351	54,855	25,395	20,580
<b>淨營運收益</b>	<b>Net Operating Income</b>	<b>259,905</b>	<b>731,109</b>	<b>342,054</b>	<b>248,728</b>	<b>122,400</b>
<b>工資資料 (佔總收入百分率) Payroll Information (Percentage of Total Revenues)</b>						
<b>工資及有關開支</b>	<b>Payroll and Related Expenses</b>					
客房	Rooms	8.1	5.7	8.1	8.4	11.8
餐飲	Food & Beverage	11.0	12.9	12.1	9.3	7.9
SPA及健康中心	Spa / Health Club	0.4	0.8	0.1	0.3	0.1
其他營業部門收入 (包括停車場收入)	Other Operating Dept. (including Parking)	0.6	1.0	0.4	0.6	0.4
行政及一般開支	Administrative & General	3.7	2.8	3.4	4.3	4.6
信息與通信系統	Information & Telecommunications Systems	0.4	0.5	0.5	0.2	0.3
市場及營銷	Sales & Marketing	2.1	2.0	2.1	2.1	2.3
工程維修部	Property Operation & Maintenance	1.6	1.2	1.5	1.7	2.2
<b>工資及有關開支合計</b>	<b>Total Payroll and Related Expenses</b>	<b>27.9</b>	<b>26.8</b>	<b>28.3</b>	<b>26.9</b>	<b>29.6</b>

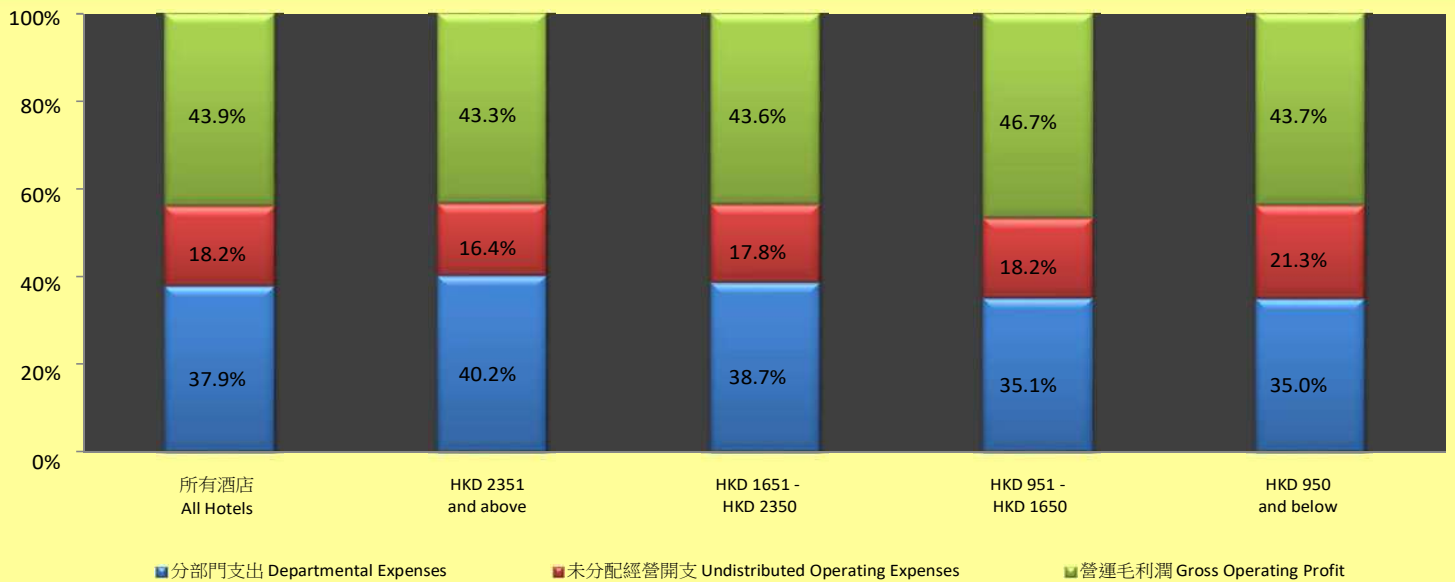
資料來源 Source : 香港酒店業務調查 Hong Kong Hotel Industry Survey

註 Remarks:

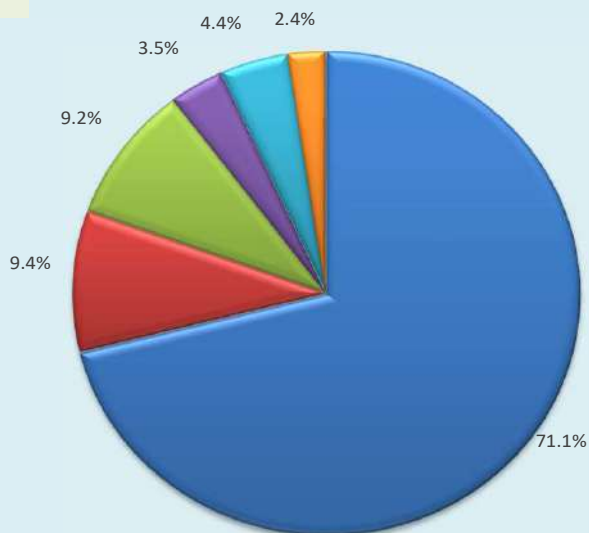
\* 數字來自旅發局之酒店入住率調查。 Figures based on results from HKTB Hotel Room Occupancy Survey.

# 2018 年香港酒店業概覽 Hong Kong Hotel Industry Summary 2018

## 2018 年營運表現 Operating Performance - 2018



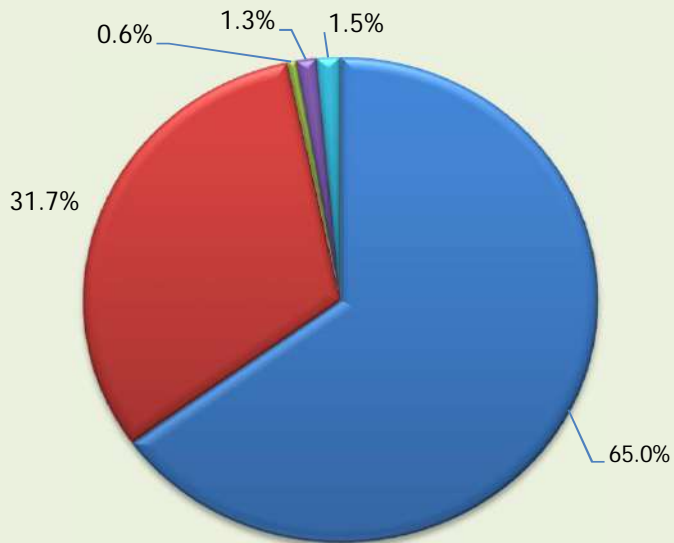
## 2018年住客原居地 Country/Region of Residence of All Guests - 2018



	2017	2018
亞洲 Asia	72.7%	71.1%
美洲 America	9.1%	9.4%
歐洲 Europe	8.6%	9.2%
大洋洲 Oceania	3.5%	3.5%
其他 Others	3.6%	4.4%
航空機組人員 Air Crew	2.7%	2.4%



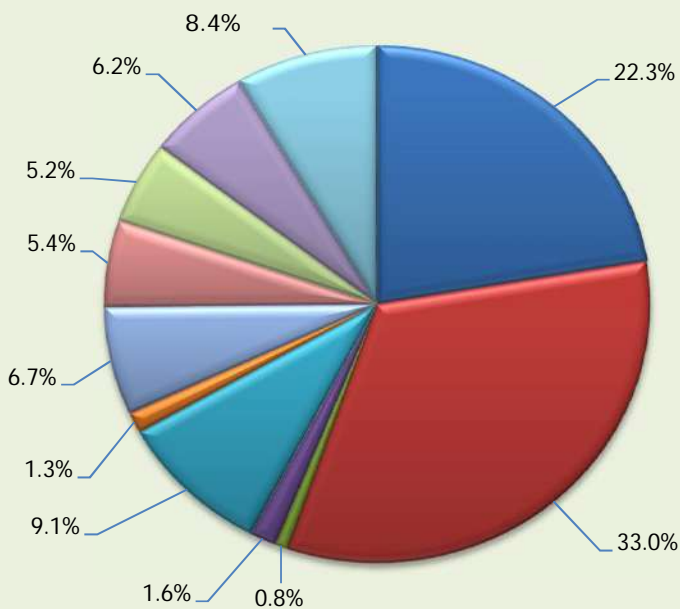
收入 Where It Came From 2018



- 客房部門  
Rooms Dept.
- 飲食部門  
Food & Beverage Dept.
- SPA及健康中心  
Spa / Health Club
- 其它營業部門  
Other Operating Department
- 雜項收入  
Miscellaneous Income

	2017	2018
客房部門 Rooms Dept.	65.0%	<b>65.0%</b>
飲食部門 Food & Beverage Dept.	32.2%	<b>31.7%</b>
SPA及健康中心 Spa / Health Club	0.8%	<b>0.6%</b>
其它營業部門 Other Operating Department	0.8%	<b>1.3%</b>
雜項收入 Miscellaneous Income	1.3%	<b>1.5%</b>

支出 Where It Went 2018



- 房間部門  
Rooms Dept.
- 飲食部門  
Food & Beverage Dept.
- SPA及健康中心  
Spa / Health Club
- 其它營業部門  
Other Operating Department
- 行政及一般開支  
Admin. & General Expenses
- 信息與通信系統\*  
Information & Telecommunication Sys.
- tem\* 市場及營銷  
Sales & Marketing
- 工程維修部  
Property Operation & Maintenance
- 能源  
Utility
- 管理費  
Management Fees
- 固定費用  
Fixed Charges

	2017	2018
房間部門 Rooms Dept.	23.3%	<b>22.3%</b>
飲食部門 Food & Beverage Dept.	33.4%	<b>33.0%</b>
SPA及健康中心 Spa / Health Club	0.9%	<b>0.8%</b>
其它營業部門 Other Operating Department	1.1%	<b>1.6%</b>
行政及一般開支 Admin. & General Expenses	8.9%	<b>9.1%</b>
信息與通信系統* Information & Telecommunication Sys.	1.2%	<b>1.3%</b>
tem* 市場及營銷 Sales & Marketing	7.0%	<b>6.7%</b>
工程維修部 Property Operation & Maintenance	5.5%	<b>5.4%</b>
能源 Utility	5.6%	<b>5.2%</b>
管理費 Management Fees	6.1%	<b>6.2%</b>
固定費用 Fixed Charges	7.2%	<b>8.4%</b>

注 Remarks:

\* 基於第11版《酒店業統一會計制度》，電話部門從營業部門中移除，資訊與通信系統被增添為未分配經營開支下的第五項。

\* Based on the 11th edition of the Uniform System of Accounts for the Lodging Industry, Telephone Department has been removed from Operating Departments while Information and Telecommunication Systems has been added as a fifth Undistributed Operating Department.



## 回應酒店一覽表 List of Responding Hotels

99號寶恒酒店	99 Bonham	華國酒店	Hotel Benito	百樂酒店	Park Hotel
龍堡國際賓館	B P International House	唯港薈	Hotel ICON	香港九龍貝爾特酒店	pentahotel Hong Kong, Kowloon
香港華大盛品酒店	Best Western Plus Hotel Hong Kong	港島英迪格酒店	Hotel Indigo Hong Kong Island	屯門貝爾特酒店	pentahotel Hong Kong, Tuen Mun
宏基國際賓館	Bishop Lei Internation House	香港沙田凱悅酒店	Hyatt Regency Hong Kong, Sha Tin	太子酒店	Prince Hotel
香港麗駿酒店	Brighton Hotel Hong Kong	尖沙咀凱悅酒店	Hyatt Regency Hong Kong, Tsim Sha Tsui	恆豐酒店	Prudential Hotel
城市花園酒店	City Garden Hotel	宜必思香港中環酒店	IBIS Hong Kong Central & Sheung Wan Hotel	富豪機場酒店	Regal Airport Hotel
港麗酒店	Conrad Hong Kong	宜必思香港北角酒店	IBIS Hong Kong North Point	富豪東方酒店	Regal Oriental Hotel
香港康得思酒店	Cordis, Hong Kong	富薈炮台山酒店	iclub Fortress Hill Hotel	麗豪酒店	Regal Riverside Hotel
香港萬怡酒店	Courtyard by Marriott Hong Kong	富薈馬頭圍酒店	iclub Ma Tau Wai Hotel	萬麗海景酒店	Renaissance Harbour View Hotel
香港沙田萬怡酒店	Courtyard by Marriott Hong Kong Sha Tin	富薈上環酒店	iclub Sheung Wan Hotel	香港珀麗酒店	Rosedale Hotel Hong Kong
香港銅鑼灣皇冠假日酒店	Crowne Plaza Hong Kong Causeway Bay	富薈灣仔酒店	iclub Wan Chai Hotel	九龍珀麗酒店	Rosedale Hotel Kowloon
香港九龍東皇冠假日酒店	Crowne Plaza Hong Kong Kowloon East	海峯嘉福洲際酒店	InterContinental Grand Stanford Hong Kong	莎瑪中環服務式公寓	Shama Central
香港觀塘帝盛酒店	Dorsett Kwun Tong, Hong Kong	港島太平洋酒店	Island Pacific Hotel	新樂酒店	Shamrock Hotel
香港東隅	EAST, Hong Kong	香港JW萬豪酒店	JW Marriott Hotel Hong Kong	香港喜來登酒店	Sheraton Hong Kong Hotel & Towers
香港逸東酒店	Eaton, Hong Kong	香港灣仔香景酒店	Kew Green Hotel Wanchai Hong Kong	南洋酒店	South Pacific Hotel
園景軒	Garden View Hong Kong	如心海景酒店暨會議中心	L' hotel Nina et Convention Centre	仕德福山景酒店	Stanford Hillview Hotel
港威酒店	Gateway Hotel	蘭桂坊酒店@九如坊	Lan Kwai Fong Hotel @ Kau U Fong	仕德福酒店	Stanford Hotel
香港粵海酒店	GDH Hotel	香港逸蘭精品酒店	Lanson Place Hotel	銅鑼灣利景酒店	The Charterhouse Causeway Bay
六國酒店	Gloucester Luk Kwok Hong Kong	數碼港艾美酒店	Le Meridien Cyberport	城景國際	The Cityview
香港君悅酒店	Grand Hyatt Hong Kong	香港珀麗尚品酒店	Le Petit Rosedale Hotel Hong Kong	灣景國際	The Harbourview
北角海逸酒店	Harbour Plaza North Point	如心銅鑼灣海景酒店	L'hotel Causeway Bay Harbour View	帝國酒店	The Imperial Hotel
嘉湖海逸酒店	Harbour Plaza Resort City	如心艾朗酒店	L'hotel elan	香港朗廷酒店	The Langham, Hong Kong
香港旺角希爾頓花園酒店	Hilton Garden Inn Hong Kong Mongkok	如心南灣海景酒店	L'hotel Island South	帝樂文娜公館	The Luxe Manor
香港銅鑼灣智選假日酒店	Holiday Inn Express Causeway Bay Hong Kong	香港旺角晉賢居	Lodgewood by L'hotel Mongkok Hong Kong	香港遨海酒店	The Olympian Hong Kong
香港九龍CBD2智選假日酒店	Holiday Inn Express Hong Kong Kowloon CBD2	香港文華東方酒店	Mandarin Oriental, Hong Kong	柏寧酒店	The Park Lane Hong Kong, a Pullman Hotel
香港九龍東智選假日酒店	Holiday Inn Express Hong Kong Kowloon East	馬哥孛羅香港酒店	Marco Polo Hongkong Hotel	香港半島酒店	The Peninsula Hong Kong
香港旺角智選假日酒店	Holiday Inn Express Hong Kong Mongkok	香港銅鑼灣維景酒店	Metropark Hotel Causeway Bay Hong Kong	中環·石板街酒店	The Pottinger Hong Kong
香港蘇豪智選假日酒店	Holiday Inn Express Hong Kong SoHo	香港九龍維景酒店	Metropark Hotel Kowloon Hong Kong	香港麗思卡爾頓酒店	The Ritz-Carlton, Hong Kong
香港金域假日酒店	Holiday Inn Golden Mile Hong Kong	香港旺角維景酒店	Metropark Hotel Mongkok	帝苑酒店	The Royal Garden
香港黃金海岸酒店	Hong Kong Gold Coast Hotel	千禧新世界香港酒店	New World Millennium Hong Kong Hotel	皇家太平洋酒店	The Royal Pacific Hotel & Towers
香港海洋公園萬豪酒店	Hong Kong Ocean Park Marriott Hotel	香港諾富特世紀酒店	Novotel Century Hong Kong	奕居	The Upper House
香港天際萬豪酒店	Hong Kong SkyCity Marriott Hotel	諾富特東薈城酒店	Novotel Citygate Hong Kong	彩鴻酒店	Travelodge Kowloon
壹零捌館	Hotel 108	香港九龍諾富特酒店	Novotel Hong Kong Nathan Road Kowloon	香港W酒店	W Hong Kong
		奧華酒店·南岸	Ovolo Southside	香港華美粵海酒店	Wharney Guang Dong Hotel
		香港遨舍衛蘭軒	OZO Wesley Hong Kong	憲酒店	Xi Hotel

如欲查詢網上研究刊物的資料，請與**香港旅遊發展局**研究部聯絡：

電話：+ 852 2807 6543  
 傳真：+ 852 2503 6377  
 電郵：research@hktb.com  
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### 浩華管理顧問公司 酒店及旅遊業顧問

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電話：+ 852 2524 6073  
 傳真：+ 852 2845 2008  
 電郵：hongkong@horwathhtl.com  
 網站：www.horwathhtl.com / www.horwathhtl-hk.com

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Telephone : + 852 2807 6543  
 Facsimile : + 852 2503 6377  
 E-mail : research@hktb.com  
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### Horwath HTL Hotel, Tourism and Leisure

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Telephone : + 852 2524 6073  
 Facsimile : + 852 2845 2008  
 E-mail : hongkong@horwathhtl.com  
 Website : www.horwathhtl.com / www.horwathhtl-hk.com

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