

# Summary of the Hong Kong Hotel Industry Review 2021

## 2021 年香港酒店業回顧 - 概覽



## 引言

本刊是香港酒店業第35份報告，由香港旅遊發展局 (HKTB) 及浩華管理顧問公司 (Horwath HTL) 共同編制，並由香港酒店業協會 (HKHA)、以及Hotel 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，2021及2020年的資料來源分別由71及92間分佈在全港的酒店提供。報告中所有統計表的金額均以港元為計算單位。

由於受到疫情反覆的影響，2020及2021年各酒店平均房價都有顯著變化，為求達到可比性，在進行數據分析時，我們依據參與酒店2019年平均每日房租將各參與酒店分為以下四個類別：2,351港元或以上，1,651港元至2,350港元，951港元至1,650港元，950港元或以下。與往年報告一樣，本報告不包括有關從業員數據分析。

本報告採用的數字均為算術平均數或加權平均數。由於並非所有酒店均提供全部項目的資料，故此每個項目均須獨立分析，而個別項目的平均數均是根據該項目所得資料而計算。

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，或者確認酒店的業績。本報告所載的歷史數據和比率只作為比較的參考指引，並非任何類別酒店的既定標準。

封面及內頁相片由香港東涌世茂福朋喜來登酒店、香港東涌世茂喜來登酒店及The Hari Hong Kong 提供。

## 業務表現

2021年所有參與酒店的平均入住率為52%，較2020年上升了12個百分點。2021年在『疫苗氣泡』放寬社交距離及回港強制檢疫措施下，本地居民入住度假(staycation)、長期住宿 (extended stay)、加上接待檢疫人士需求，彌補部分訪港旅客住宿需求，全年入住率回升至五成，但仍然處於低水平。

2021年訪港旅客與過夜旅客人次繼續大幅減少，分別錄得97%及93%的減幅。全年過夜旅客從2019年的2,375萬人次減少至2020年的135萬人次，2021年更跌至只有8.9萬人次。

2021年的平均房價為845港元。與2020年的相比，2021年只有平均房價950港元或以下類別的酒店房租上升了11港元，其他三個酒店類別的平均房價皆分別錄得下降，酒店平均房價以2,350港元以上、1,651港元至2,350港元兩個類別下降最多，皆減少約270港元左右。

在客房部門方面，平均每可供出租房間的客房收入上升65%，支出上升幅度較少為28%，整體利潤為84,661港元。

平均每可供出租房間的餐飲收入及開支與2021年相比分別上升82%及46%，轉虧為盈，錄得26,634港元利潤。餐飲收入佔總收入50%，貢獻高於客房收入。

總體上，雖然2021年的經營環境有所改善但仍處於不明朗的前景，所有參與酒店的平均可供出租房間仍錄得1,251港元營運虧損，較2020年的虧損減少96%，營運毛利率至負0.3%。

直接散客仍是最大需求來源，它的市場佔比為53.9%。第二大市場為分銷/包價散客，佔比達18.2%。商務散客些微上升，佔12.7%。所有團隊業務仍然處於停頓，合共只佔1.4%。

## Introduction

This is the 35th edition of the Hong Kong Hotel Industry Report, jointly produced by the Hong Kong Tourism Board (HKTB) and 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. 2021 and 2020 data was contributed by 71 and 92 hotels located throughout Hong Kong. All prices found in this report are presented in Hong Kong Dollars.

Due to the continued impact of the COVID-19 global pandemic, Average Daily Rate (ADR) achieved by each participating hotel has severely changed over the past two years. To establish comparability in analysing 2020 and 2021 data, we segment the participating hotels by their achieved ADR in 2019 into the following four categories: HK\$ 2,351 and above, HK\$ 1,651 to HK\$ 2,350, HK\$ 951 to HK\$ 1,650, and HK\$ 950 and below. Meanwhile, same as previous year's report, this report has not covered the Employment Statistics.

All 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.

The HKTB and Horwath HTL make no attempt to set prices or conform 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.

Courtesy of photos from Four Points by Sheraton Hong Kong Tung Chung, Sheraton Hong Kong Tung Chung Hotel and the Hari Hong Kong.

## Performance Highlights

The average occupancy of all participating hotels in 2021 was increased by 12 percentage points to 52%. In 2021, under the relaxation of social distancing measures based on 'vaccine bubble' and quarantine requirements for inbound travellers, staycation, quarantine packages and extended-stay were the major sources of hotel demand, resulting in occupancy level climbing up to 52% but still at low level.

The total visitor arrivals and overnight visitors in Hong Kong continued to decrease by 97% and 93% respectively in 2021. The overnight visitor arrivals dropped from 23.75 million in 2019 to 1.35 million in 2020, and further decreased to 89,190 only.

The average room rate was HK\$845 in 2021. Hotels of each segment all recorded decline in average room rate. The situation is more severe for hotels in ADR HK\$2,351 and above and HK\$1,651 to HK\$ 2,350 categories, both of their room rates decreased by around HK\$270.

For the rooms department, revenues per available room showed a remarkable increase of 65%, while room expenses increased to a lesser extent by 28%, resulting in HK\$ 84,661 department profit.

Food and beverage revenue and expenses per available room both increased by 82% and 46% respectively, showing a turn from loss to profit of HK\$26,634. Food and beverage revenue in 2021 was the largest contributors to total revenue, accounting for 50% of total revenue.

Though the business environment showed slightly improvement in 2021, uncertainty remains high amid the pandemic. All the participating hotels continued to experience a gross operating loss per available room of HK\$ 1,251 but a remarkable 96% decrease comparing to 2020 and the gross profit margin was negative 0.3%.

Direct FIT remained the largest source of demand, accounting for 53.9% of total demand. The second largest market segment was Wholesale/Package FIT, accounting for 18.2%. Corporate FIT slightly increased to 12.7%. All group related businesses were not appeared yet, representing merely 1.4 % of the total demand source. .

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## 按參與酒店2019年實際平均房價表現分類

Based on Participating Hotel's 2019 Achieved ADR

		所有酒店 All Hotels	HKD 2,351 and above	HKD 1,651–2,350	HKD 951 –1,650	HKD 950 and below
參與本調查的酒店數目	Number of Participating Hotels	71	11	10	24	26
每日實際入住房間數目	Number of Rooms Occupied per Day	12,721	1,292	1,554	4,984	4,892
酒店入住率 (%)	Hotel Occupancy (%)	52%	33%	35%	52%	72%
平均每日房租 (港元)	Average Daily Room Rates (HK\$)	845	2,559	939	787	423

## 每一可供出租房間部門收支 Departmental Revenues &amp; Expenses per Available Room

經營收入	Operating Revenue	HK\$	HK\$	HK\$	HK\$	HK\$
客房	Rooms	163,911	340,573	120,387	150,314	109,713
餐飲	Food & Beverage	184,154	569,718	201,067	123,020	36,767
SPA及健康中心	Spa / Health Club	6,095	33,435	2,007	1,038	104
其他營業部門收入	Other Operating Dept.	5,301	7,715	1,966	2,708	9,714
雜項收入	Miscellaneous Income	8,280	16,507	11,005	4,394	7,200
<b>部門收入合計</b>	<b>Total Departmental Revenues</b>	<b>367,741</b>	<b>967,949</b>	<b>336,432</b>	<b>281,474</b>	<b>163,500</b>
部門支出	Departmental Expenses					
客房	Rooms	79,249	161,701	73,984	65,258	54,813
餐飲	Food & Beverage	157,520	475,181	162,174	109,894	38,318
SPA及健身中心	SPA / Health Club	7,064	34,317	3,546	2,435	155
其他營業部門	Other Operating Departments	4,925	11,482	3,459	2,778	5,110
<b>部門支出合計</b>	<b>Total Departmental Expenses</b>	<b>248,758</b>	<b>682,680</b>	<b>243,163</b>	<b>180,365</b>	<b>98,396</b>
<b>部門利潤/虧損合計</b>	<b>Total Departmental Profit/Loss</b>	<b>118,983</b>	<b>285,269</b>	<b>93,269</b>	<b>101,108</b>	<b>65,103</b>
未分配經營開支	Undistributed Operating Expenses					
行政及一般開支	Administrative & General	36,304	75,891	34,731	29,848	23,584
信息與通信系統	Information & Telecommunications Systems	8,042	18,724	8,590	8,118	1,434
市場及營銷	Sales & Marketing	23,636	61,057	23,432	18,449	9,493
工程維修	Property Operation & Maintenance	26,081	58,059	24,308	19,143	18,541
能源	Utilities	26,170	56,389	29,259	20,874	14,171
<b>未分配經營開支合計</b>	<b>Total Undistributed Operating Expenses</b>	<b>120,233</b>	<b>270,120</b>	<b>120,320</b>	<b>96,432</b>	<b>67,224</b>
營運毛利潤	Gross Operating Profit					
管理費 (基本費及獎金)	Management Fees (Base Fee & Incentive Fee)	8,643	22,528	6,132	4,465	8,135
<b>除去非經營相關收入及支出前之收益</b>	<b>Income Before Non-Operating Income and Expenses</b>	<b>-9,893</b>	<b>-7,380</b>	<b>-33,182</b>	<b>211</b>	<b>-10,255</b>
非經營相關收入及支出	Non-Operating Income and Expenses	-22,051	-30,562	-20,070	-18,802	-22,990
息稅前收益	EBITDA					
資本重置儲備	Reserve For Capital Replacement	7,371	21,204	4,938	4,821	4,566
<b>扣除資產重置儲備後的息、稅前收益</b>	<b>EBITDA Less Replacement Reserve</b>	<b>-39,315</b>	<b>-59,146</b>	<b>-58,190</b>	<b>-23,411</b>	<b>-37,811</b>

## 工資資料 (佔總收入百分率) Payroll Information (Percentage of Total Revenues)

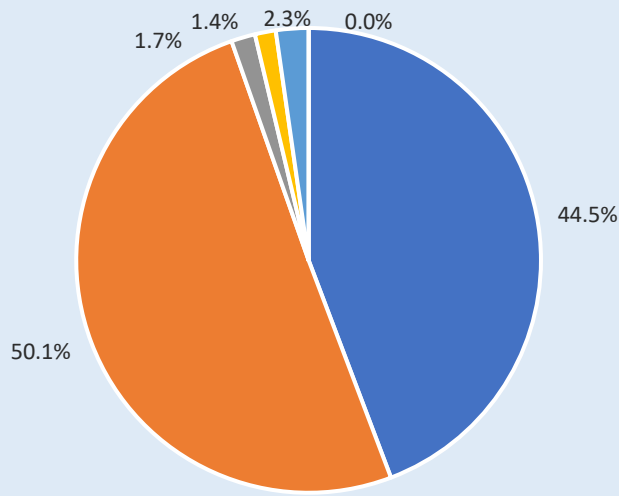
工資及有關開支	Payroll & Related Expenses	%	%	%	%	%
客房	Rooms	13.2	9.9	15.2	13.5	21.0
餐飲	Food & Beverage	22.9	26.8	26.1	20.7	10.7
SPA及健身中心	SPA / Health Club	1.2	2.1	0.5	0.7	N
其他營業部門	Other Operating Departments	0.8	0.8	0.9	0.7	0.7
行政及一般開支	Administrative & General	6.7	5.1	7.1	7.7	9.0
信息與通信系統	Information & Telecommunications Systems	0.9	0.8	1.1	1.1	0.3
市場及營銷	Sales & Marketing	3.5	3.1	4.2	3.5	3.9
工程維修	Property Operation & Maintenance	3.0	2.1	3.1	3.2	5.1
<b>工資及有關開支合計</b>	<b>Total Payroll and Related Expenses</b>	<b>52.2</b>	<b>50.7</b>	<b>58.2</b>	<b>51.1</b>	<b>50.7</b>

# 2021年香港酒店業概覽

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### 收入

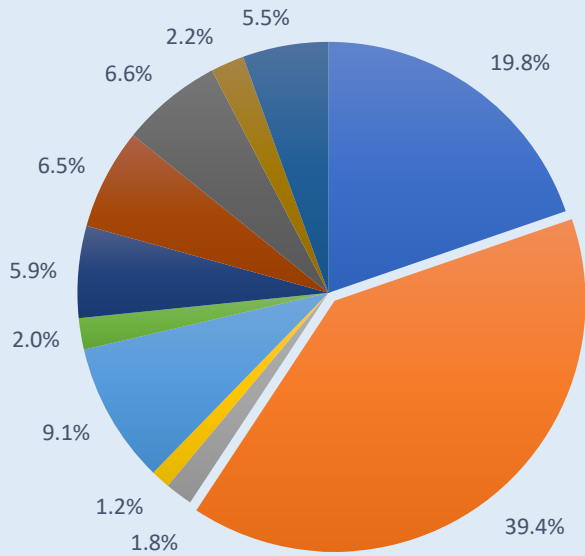
#### Where It Came From



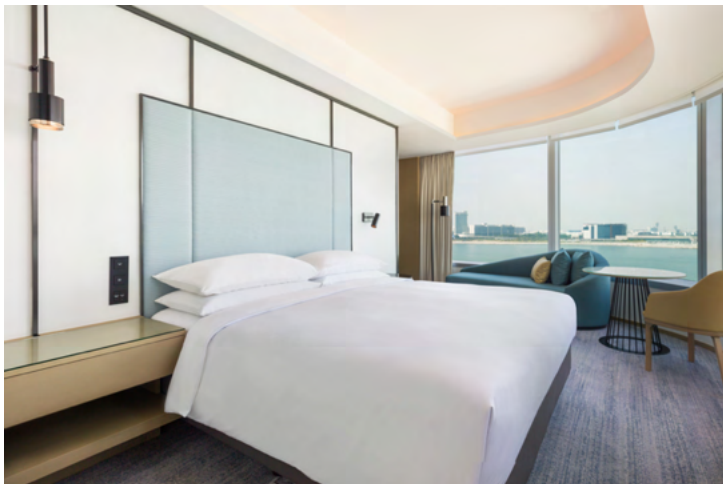
	2020	2021
Rooms 客房	42.9%	44.5%
Food & Beverage 餐飲	38.8%	50.1%
Spa / Health Club SPA及健康中心	1.3%	1.7%
Other Operating Dept. 其他營業部門收入	2.8%	1.4%
Miscellaneous Income 雜項收入	2.3%	2.3%
Government Subsidies ESS 政府工資補貼	11.9%	-

### 支出

#### Where It Went To

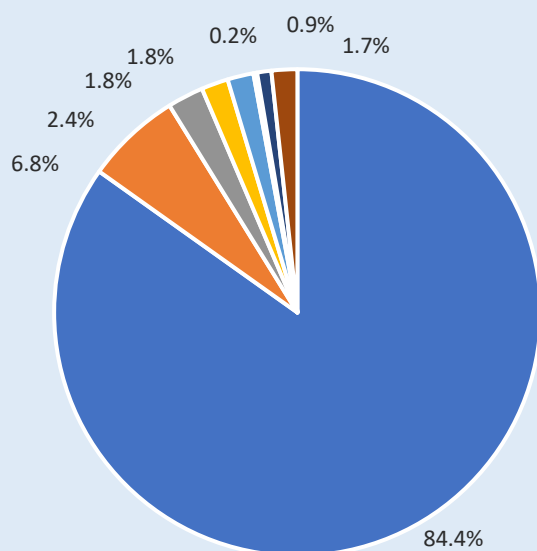


	2020	2021
Rooms 客房	21.5%	19.8%
Food & Beverage 餐飲	33.4%	39.4%
Spa / Health Club SPA及健康中心	1.0%	1.8%
Other Operating Dept. 其他營業部門收入	1.6%	1.2%
Administrative & General 行政及一般開支	9.7%	9.1%
Information & Telecommunications Systems 信息與通信系統	1.9%	2.0%
Sales & Marketing 市場及營銷	6.2%	5.9%
Property Operation & Maintenance 工程維修部	7.3%	6.5%
Utility 能源	7.2%	6.6%
Management Fees [Base & Incentive] 管理費 (基本數及獎金)	2.0%	2.2%
Non-Operating Income and Expenses 非經營相關收入及支出	8.1%	5.5%



## 住客原居地

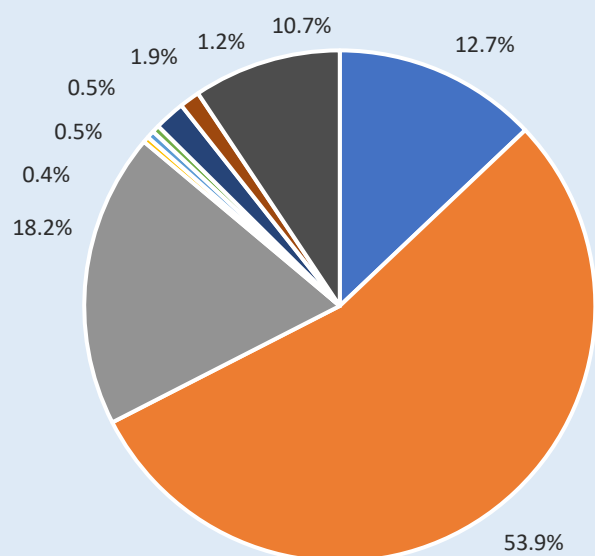
### Region of Residence of All Guests



	2020	2021
Domestic 本地	72.7%	84.4%
Mainland China 中國內地	9.3%	6.8%
Other Asia 其他亞洲國家	6.1%	2.4%
America 美洲	2.9%	1.8%
Europe 歐洲	2.9%	1.8%
Oceania 大洋洲	0.9%	0.2%
Other 其他	3.5%	0.9%
Airline Crew 航空機組人員	1.7%	1.7%

## 市場組成部份

### Composition of Market



	2020	2021
Corporate / Business FIT 商務散客	12.1%	12.7%
Direct FIT 直接散客	52.0%	53.9%
Whole / Package FIT 分銷/包價散客	16.6%	18.2%
In-house Meeting 酒店內會議團隊	1.2%	0.4%
Other MICE 其他會議/展覽/獎勵旅遊	0.3%	0.5%
Leisure Group 旅遊團隊	0.4%	0.5%
Airline Crew 航空機組人員	2.9%	1.9%
Walk-in 無預定旅客	2.1%	1.2%
Others 其他	12.4%	10.7%



## 回應酒店一覽表

### List of Responding Hotels

龍堡國際	B P International	富著尚乘上環酒店	iclub AMTD Sheung Wan Hotel	麗豪酒店	Regal Riverside Hotel
宏基國際賓館	Bishop Lei International House	富著炮台山酒店	iclub Fortress Hill Hotel	萬麗海景酒店	Renaissance Harbour view Hotel
麗駿酒店	Brighton Hotel Hong Kong	富著馬頭圍酒店	iclub Ma Tau Wai Hotel	九龍珀麗酒店	Rosedale Hotel Kowloon
香港馨樂庭亞士厘公寓酒店	Citadines Ashley Hong Kong	富著旺角酒店	iclub Mong Kok Hotel	香港瑰麗酒店	Rosewood Hong Kong Hotel
香港港麗酒店	Conrad Hong Kong	富著上環酒店	iclub Sheung Wan Hotel	皇家太平洋酒店	Royal Pacific Hotel
香港康得思酒店	Cordis, Hong Kong	富著灣仔酒店	iclub Wan Chai Hotel	香港莎瑪中環服務式公寓	Shama Central
香港萬怡酒店	Courtyard by Marriott Hong Kong	海景嘉福洲際酒店	InterContinental Grand Stanford	香港莎瑪港島北服務式公寓	Shama Island North
香港沙田萬怡酒店	Courtyard by Marriott Hong Kong Sha Tin	香港 JW 萬豪酒店	JW Marriott Hotel Hong Kong	香港喜來登酒店	Sheraton Hong Kong Hotel & Towers
香港九龍東皇冠假日酒店	Crowne Plaza Hong Kong Kowloon East	香港灣仔睿景酒店	Kew Green Hotel WanChai	香港東涌世茂喜來登酒店	Sheraton Hong Kong Tung Chung Hotel
香港觀塘帝盛酒店	Dorsett Kwun Tong, Hong Kong	九龍悅來酒店	Kowloon Panda Hotel	銀鑲灣渡假酒店	Silvermine Beach Resort
香港東隅	EAST Hong Kong	香港逸蘭精品酒店	Lanson Place Causeway Bay	香港盛捷維園公寓酒店	Somerset Victoria Park Hong Kong
香港東涌世茂福朋喜來登酒店	Four Points by Sheraton Hong Kong Tung Chung	數碼港艾美酒店	Le Meridien Cyberport	南洋酒店	South Pacific Hotel
香港四季酒店	Four Seasons Hotel Hong Kong	香港旺角晉賢居	Lodgewood by Nina Hospitality Mong Kok	仕德福山景酒店	Stanford Hillview Hotel
園景軒	Garden View Hong Kong	馬哥孛羅香港酒店	Marco Polo Hongkong Hotel	仕德福酒店	Stanford Hotel
港威酒店	Gateway Hotel	香港九龍維景酒店	Metropark Hotel Kowloon	峰景軒	Summit View Kowloon
六國酒店	Gloucester Luk Kwok Hong Kong	香港旺角維景酒店	Metropark Hotel Mongkok	銅鑼灣利景酒店	The Charterhouse Causeway Bay
香港君悅酒店	Grand Hyatt Hong Kong	千禧新世界香港酒店	New World Millennium Hong Kong Hotel	城景國際	The Cityview
8 度海逸酒店	Harbour Plaza 8 Degrees	銅鑼灣如心店	Nina Hotel Causeway Bay	灣 景 國 際	The Harbourview
香港旺角希爾頓花園酒店	Hilton Garden Inn Hong Kong Mongkok	南灣如心酒店	Nina Hotel Island South	香港 The Hari 酒店	The Hari Hong Kong
香港銅鑼灣智選假日酒店	Holiday Inn Express Causeway Bay Hong Kong	荃灣西如心酒店	Nina Hotel Tsuen Wan West	香港朗廷酒店	The Langham, Hong Kong
香港九龍 CBD2 智選假日酒店	Holiday Inn Express Hong Kong Kowloon CBD2	香港諾富特世紀酒店	Novotel Century Hong Kong	香港美利酒店	The Murray, Hong Kong, A Niccolo Hotel
香港九龍東智選假日酒店	Holiday Inn Express Hong Kong Kowloon East	諾富特東薈城酒店	Novotel Citygate Hong Kong	香港遨凱酒店	The Olympian Hong Kong
香港旺角智選假日酒店	Holiday Inn Express Hong Kong Mongkok	香港九龍諾富特酒店	Novotel Nathan Road Kowloon Hong Kong	香港康逸酒店	The Otto Hotel
金城假日酒店	Holiday Inn Golden Mile	香港粵海酒店	Oasis Avenue A GDH Hotel	中環·石板街酒店	The Pottinger Hong Kong
香港黃金海岸酒店	Hong Kong Gold Coast Hotel	One Eight One 酒店及服務式住宅	One–Eight–One Hotel & Serviced Residences	香港麗思卡爾頓酒店	The Ritz–Carlton, Hong Kong
香港海洋公園萬豪酒店	Hong Kong Ocean Park Marriott Hotel	香港逸舍衛蘭軒	OZO Wesley Hong Kong	港青酒店	The Salisbury – YMCA of Hong Kong
香港天際萬豪酒店	Hong Kong Skycity Marriott Hotel	百樂酒店	Park Hotel	香港瑞吉酒店	The St. Regis Hong Kong
壹零捌館	Hotel 108	香港九龍貝爾特酒店	Pentahotel Hong Kong, Kowloon	奕居	The Upper House
港島英迪格酒店	Hotel Indigo Hong Kong Island	屯門貝爾特酒店	Pentahotel Hong Kong, Tuen Mun	粵海華美灣際酒店	The Wharney Guang Dong Hotel Hong Kong
香港紫亭	Hotel Purple	恆豐酒店	Prudential Hotel	彩鴻酒店	Travelodge Kowloon
香港維港凱悅尚萃酒店	Hyatt Centric Victoria Harbour Hong Kong	富豪機場酒店	Regal Airport Hotel	香港 W 酒店	W Hong Kong
香港沙田凱悅酒店	Hyatt Regency Hong Kong, Sha Tin	富豪香港酒店	Regal Hongkong Hotel	憲 酒店	Xi Hotel
尖沙咀凱悅酒店	Hyatt Regency Hong Kong, Tsim Sha Tsui	富豪九龍酒店	Regal Kowloon Hotel	青年廣場 Y 旅舍	Y Loft, Youth Square
富著北角酒店	ibis North Point	富豪東方酒店	Regal Oriental Hotel		

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#### Horwath HTL

#### Hotel, Tourism and Leisure

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