



MAY 2016
2016年5月

EXCERPTS

CHINA HOTEL INVESTMENT WATCH 2016

ZHENGZHOU

节选

中国酒店投资展望 2016

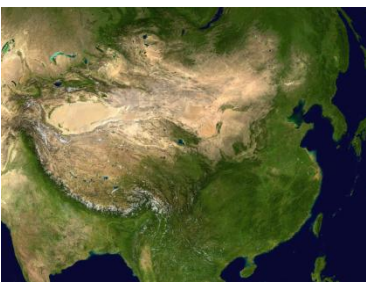
郑州

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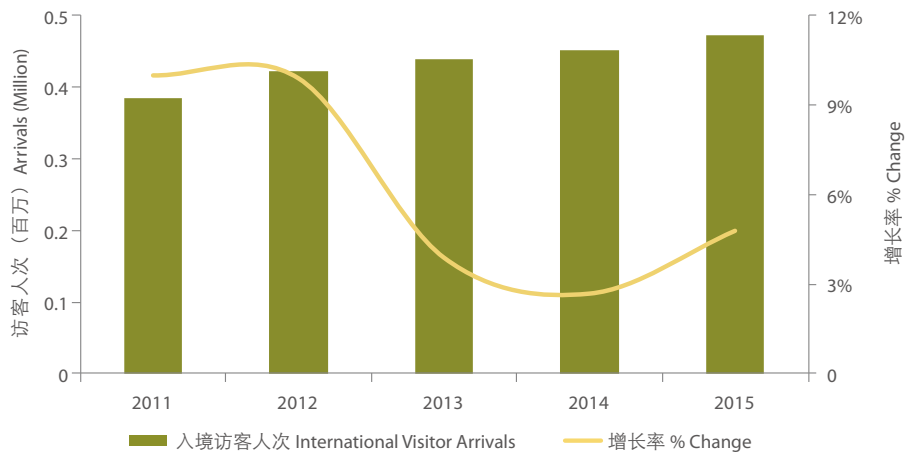
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郑州国内和入境访客人次
DOMESTIC AND INTERNATIONAL VISITOR ARRIVALS, ZHENGZHOU, 2011–2015

Driven by the integration of tourism resources and tourism investment projects, and affected positively by the Shanghai Cooperation Organization (SCO) Summit held in Zhengzhou, both international and domestic visitor arrivals experienced a strong rebound in 2015.

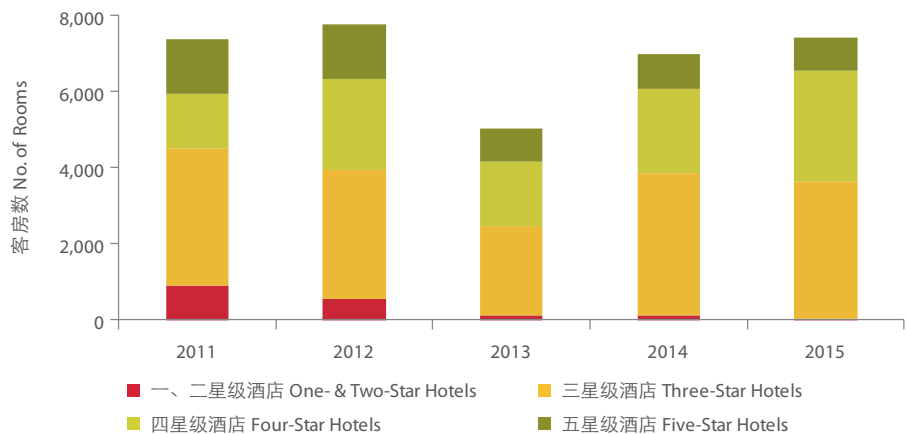


来源：豪威盛 Source: HVS Research

郑州星级酒店市场供给
STAR-RATED HOTEL MARKET SUPPLY, ZHENGZHOU, 2011–2015

2015年郑州市星级酒店客房供应量较2014年略有增长。2013年至2015年期间，四星级酒店市场增长势头最为强劲。

In 2015, Zhengzhou's star-rated hotel room supply recorded a slight increase over 2014. During the period from 2013 to 2015, the four-star segment exhibited the strongest growth.



	2011	2012	2013	2014	2015
五星级酒店 Five-Star Hotels	20%	19%	17%	12%	12%
四星级酒店 Four-Star Hotels	19%	31%	34%	32%	39%
三星级酒店 Three-Star Hotels	49%	43%	47%	54%	48%
一、二星级酒店 One & Two-Star Hotels	12%	7%	2%	2%	1%

来源：豪威盛 Source: HVS Research

郑州酒店区分布 DISTRIBUTION OF HOTEL SUBMARKETS, ZHENGZHOU, 2016–2020



- A 商业金融中心
Business and Finance Centre
- B 郑东新区和郑州航空港
Zhengdong New District and
Zhengzhou Airport Economy Zone

● 现有酒店区 Existing Hotel Submarkets

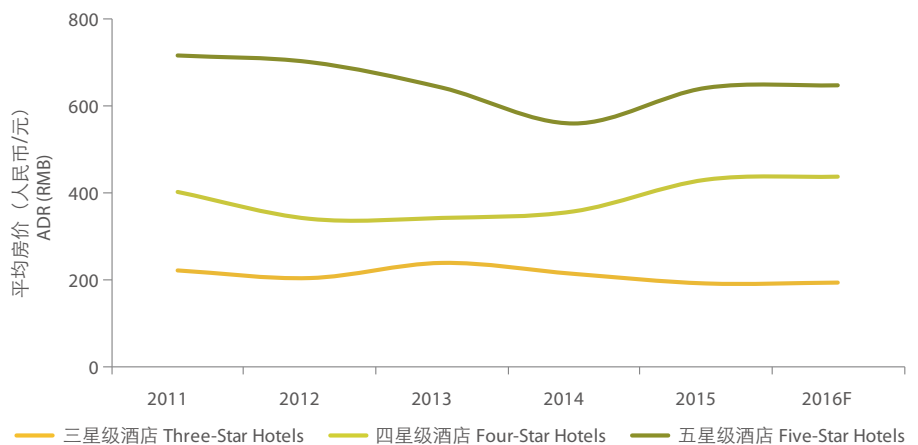
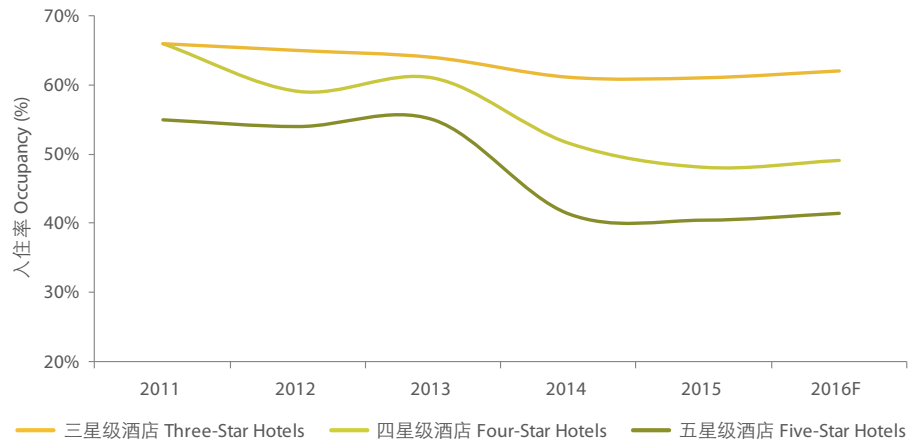
开业年份 Opening Year	新增供给 New Supply	酒店区 Submarket	客房数 No. of Rooms
2016	郑州航空港万怡酒店 Courtyard by Marriott Zhengzhou Hangkonggang	B	278
	郑州怡思得商务精品酒店 Inside Zhengzhou	B	328
	郑州美利亚酒店 Meliá Zhengzhou	B	205
	郑州万达文华酒店 Wanda Vista Zhengzhou	其他 Other	292
	郑州金印雅高美爵酒店 Grand Mercure Zhengzhou Jinyin	其他 Other	226
2017	郑州郑东英迪格酒店 Hotel Indigo Zhengzhou East	B	130
	郑州新世界酒店 New World Zhengzhou Hotel	其他 Other	300
	雁鸣湖安麓 Ahn Luh Yanming Lake	其他 Other	108
2019	郑州费尔蒙酒店 Fairmont Zhengzhou	B	350
	郑州希尔顿逸林酒店 DoubleTree by Hilton Zhengzhou	B	待定 TBC
	郑州君悦酒店 Grand Hyatt Zhengzhou	其他 Other	400
2020	郑州龙湖威斯汀酒店 The Westin Zhengzhou Longhu	B	300
待定 TBC	郑州君悦酒店 Grand Hyatt Zhengzhou	其他 Other	400
	郑州天地丽笙酒店 Radisson Blu Zhengzhou Huiji	其他 Other	273
	郑州盛美利亚酒店 Gran Meliá Zhengzhou	其他 Other	388

来源：豪威盛 Source: HVS Research

郑州星级酒店市场业绩 STAR-RATED HOTEL MARKET PERFORMANCE, ZHENGZHOU, 2011-2016F

在上合组织成员国政府首脑理事会第十四次会议在郑州举行的影响下，四星级和五星级酒店的平均房价都出现了不同程度的上升。2016博鳌亚洲论坛秋季高峰会议已确定在郑州举办，一定程度上将会促进该市酒店市场回暖。

Impacted by the 14th SCO prime ministers' meeting that was held in Zhengzhou, the average rates of four-star and five-star hotels experienced different levels of growth in 2015. The Boao Forum for Asia Autumn Conference 2016 has also been confirmed for Zhengzhou, which is expected to stimulate the recovery of the city's hotel market in 2016.



来源：豪威盛 Source: HVS Research

未来展望：随着新增供应逐渐被市场吸收，2016年(预测)郑州酒店市场预计将回暖，入住率和平均房价都将小幅上升。郑东新区和郑州航空港区将发展成为重点新兴酒店区。未来新增供应的增加预计将在中期内对市场造成下行压力。

Outlook: The overall market is forecast to recover in 2016F as new supply is gradually absorbed. Marketwide occupancy and average rate are expected to increase slightly. Zhengdong New District and Zhengzhou Airport Economy Zone are set to emerge as a key submarket. Further increases in supply are expected to exert downward pressure on the market in the medium term.



ABOUT HVS

HVS, the world's leading consulting and services organization focused on the hotel, mixed-use, shared ownership, gaming, and leisure industries, celebrated its 35th anniversary in 2015. Established in 1980, the company performs 4,500+ assignments each year for hotel and real estate owners, operators, and developers worldwide. HVS principals are regarded as the leading experts in their respective regions of the globe. Through a network of more than 35 offices and more than 500 professionals, HVS provides an unparalleled range of complementary services for the hospitality industry.

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Everywhere.**

HVS ASIA PACIFIC is represented by its offices in Beijing, Shanghai, Shenzhen, Hong Kong, Bangkok, Singapore, and New Delhi. Through its four offices in Greater China, HVS has appraised or advised on existing hotels and resorts, as well as development projects located in more than 150 cities and resort markets across China. HVS also hosts four of the main annual industry events in the region, namely the China Hotel Investment Conference (CHIC), Hotel Investment Conference - South Asia (HICSA) and the Tourism, Hotel Investment & Networking Conference (THINC) Indonesia; and Tourism, Hotel Investment & Networking Conference (THINC) Sri Lanka. The China Hotel Investment Conference (CHIC), now in its 12th year, is widely regarded as the most influential hotel investment conference in the region.

Additionally, HVS publishes a wide range of leading research reports, article sand surveys on all aspects of hospitality, including hotel valuations, investing, lending, operations, asset management and sales & marketing, among others.

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About the Authors



Emily Zhang is a senior analyst at HVS Beijing, working primarily on hotel consulting assignments, including market studies and feasibility studies, in the mainland of China.

Graduating with Master of Management degree from the Beijing International Studies University and with previous working and research experience in hotel operations, Emily brings a comprehensive knowledge of the hospitality industry to HVS.



Daniel J Voellm, Managing Partner HVS Asia-Pacific, is based in Hong Kong and has provided advice in all major markets across 18 countries in the region. Daniel Voellm

started his career at HVS in the New York office; as Vice President at the global headquarters, he conducted a wide range of appraisals and market studies as well as underwriting due diligence services in 22 US states and in Canada. Daniel brings a strong understanding of the hospitality industry to HVS. His experience in hotel and food and beverage operations in Germany, Switzerland, England and the USA is complemented by an Honours Bachelor of Science degree from Ecole Hôtelière de Lausanne in Switzerland. Daniel works closely with key institutional and private owners of hotel properties, financiers, developers and investors, and has gained a strong understanding of their investment requirements and approaches to assessing the market value of investment properties. Daniel further advises on property and concept development and strategy.



豪威盛简介

豪威盛是一家全球领先咨询与服务机构，服务范围主要涉及酒店、综合开发项目、共享所有权、博彩和休闲物业。公司成立于1980年，每年为全球的酒店及房地产业主、管理公司和开发商进行超过4,500个咨询服务项目。豪威盛的领导团队由全球各区域的顶尖专家组成。豪威盛在全球各地设有超过35家办事处，由500多名经验丰富的专业人士组成，为酒店业提供无与伦比的优质配套服务。HVS.COM

以全球视野结合本土智慧，引领酒店行业开拓卓越绩效。

豪威盛亚太区办事处分布于香港、曼谷、北京、广州、雅加达、上海和新德里。通过其位于大中华区的4家办事处，豪威盛曾为遍布中国150多个城市和度假市场的酒店、度假村和开发项目提供咨询。豪威盛还在亚太区主办四大主要年度行业盛会：中国酒店投资高峰论坛（CHIC）、南亚酒店投资会议（HICSA）、印度尼西亚旅游、酒店投资与交流峰会（THINC）和斯里兰卡旅游、酒店投资与交流峰会（THINC）。豪威盛今年成功主办中国最具影响力的酒店投资会议——第12届中国酒店投资高峰论坛。

此外，豪威盛也出版了大量涵盖酒店业各个领域包括酒店估值、投资、贷款、运营、资产管理、销售和市场营销等的研究报告、文章和调查分析报告。

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作者简介



张笑语是豪威盛北京办公室的高级分析师，主要负责酒店咨询，包括市场研究和可行性研究工作。其酒店咨询项目主要在中国大陆地区。她获得北京第二外国语学院管理学硕士学位，拥有酒店相关理论研究和运营的工作经验，对酒店业有深刻的理解和认识。



王敬源现任豪威盛亚太区管理合伙人，常驻香港，服务亚太地区的18个主要市场。他在豪威盛的履历始于本公司纽约总部，担任副总裁，在美国22个州和加拿大负责各类评估、市场研究和承销尽职调查服务。王敬源深入了解酒店行业，他在德国、瑞士、英国和美国获得的酒店和餐饮运营经验，与其所获得的瑞士洛桑酒店管理学院理学士（优等）学位相得益彰。王敬源与主要的酒店物业机构和私人业主、融资方、开发商及投资者密切合作，深入了解他们的投资要求和评估投资物业市场价值的方式，进而提供有关物业和概念开发及战略方面的咨询建议。