

业绩符合预期，未来3年高增长相对确定，逢低买入

公司简报

◆事件：发布2012年年报及2013年一季度业绩预告

2012年公司实现营业收入和归属于上市公司股东的净利润分别为5.9亿元和2.6亿元，同比分别增长16.2%和15.5%，实现EPS 0.46元。业绩符合预期。2013年1季度业绩预告：受宋城景区提价及“一票制”整合、短茅果乐园提价和游客增加等因素提振，盈利同比增长4%-10%，扣非后净利润同比增长15%-30%，即一季度预计实现盈利4254万元-4499万元。略好于预期。

◆业绩点评及2013年业绩展望：

2012年公司收入增长16.2%略超预期，主要得益于：（1）宋城二期投入使用后游客吸引力进一步提升的10%，加上门票提价共同带动收入在高基数上仍实现同比15%的增长；（2）7月开业的短茅果乐园在杭州亲子市场的反响显著超出预期，2012年实现收入4130万元。2013年初宋城景区联票平均票价提升20元且开始推进一票制改革，短茅果乐园提价30元至150元且营业时间增加一倍加之市场美誉度的进一步提升，我们预计2013年宋城景区和短茅果乐园有望分别实现30%和100%以上的高增长；与此同时，在2012年受阴雨天气和台风影响客流出现同比约10%下滑的杭州乐园2013年在地铁1号线通车等因素的带动下有望恢复超过10%以上的增长，加上《美越千古情》知名度日渐提升，我们预计2013年公司杭州大本营收入增速将不低于30%，2013年1季度的开门红也增强我们对此判断的信心。

但是，（1）宋城二期、短茅果乐园和杭州乐园改造项目将固定带来折旧费用同比增长71%；（2）异地扩张人员储备及短茅果乐园开园促使薪酬和劳务费同比增长35%；（3）景区升级改造维修费、短茅果乐园开园费用和千古情演出物耗的增加使得其他费用同比增长28%；三大因素共同导致2012年公司营业成本同比大幅增长46%，营业毛利率下降约5.5个百分点。因此，2012年公司扣非后归属于上市公司股东的净利润为2.2亿元，同比增长仅7%，比收入增速低约10个百分点。未来3年公司均处于快速扩张期，折旧、薪酬和劳务增加等因素仍将存在，但预计增速将较2012年略平缓，对业绩拖累会有所降低。

◆未来3年异地扩张有序兑现，推动2014年后业绩实现30%以上高速增长：

三亚、丽江千古情主体结构已封顶，编创工作顺利推进，预计最快3-4季度正式运营；九寨千古情全线开工，泰山、武夷山和石林千古情也已基本落地并有序推进；即按照1-1.5年建设周期，我们预计13-15年公司有望以每年新增2台演出的节奏有序完成全国布局。考虑到动辄3-5亿元的投资额，2000万左右的前期开办费及每个项目50万左右客流的盈亏平衡点，我们预计异地拓张项目培育时间在1年以上，即最早有望在2014年成为公司业务增长的推动力。

◆中高层实现业绩高速增长动力充足，估值合理，逢低买入：

综上，我们乐观预计公司13-15年净利润增速分别为20.4%、25.8%和32.4%，与公司中高层即将以6.28元/股获得的450万份限制性股票的解锁业绩要求基本一致。在较高的解锁业绩鞭策，超过100%的价差激励和控股股东的持续增持下，我们预计公司中高层有充足的动力和信心确保业绩的高增长。预计2013-2014年公司摊薄后EPS分别为0.55、0.70和0.92元，对应的PE与行业平均水平相当，鉴于其外延扩张成效的较高确定性，我们建议投资者逢低可积极关注，给予公司“买入”评级。

◆风险提示：异地项目投资进展，投资成效不达预期风险；自然灾害等风险。业绩预测和估值指标

指标	2011	2012	2013E	2014E	2015E
营业收入(百万元)	505	586	803	1028	1348
营业收入增长率	13.44%	16.18%	36.94%	28.04%	31.13%
净利润(百万元)	222	257	309	389	515
净利润增长率	36.05%	15.45%	20.42%	25.84%	32.39%
EPS(元)	0.40	0.46	0.55	0.70	0.92
ROE(归属母公司)(摊薄)	8.22%	8.89%	9.84%	11.31%	13.42%
P/E	34	29	24	19	15

买入(调升)

当前的目标价：13.48/19.33元

目标期限：12个月

分析师

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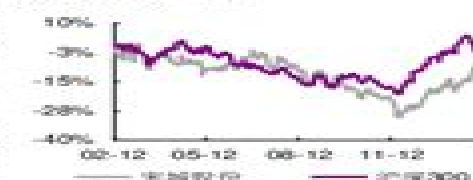
总股本(亿股)：3.54

总市值(亿元)：74.73

一年最低/最高(元)：10.64/24.13

近3月换手率：22.10%

股价表现(一年)



收益表现

%	一个月	三个月	十二个月
相对	7.14	-6.33	-11.23
绝对	6.98	11.69	-14.27

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