



**China Budget Hotel Industry Report,
2011-2012**

Aug. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

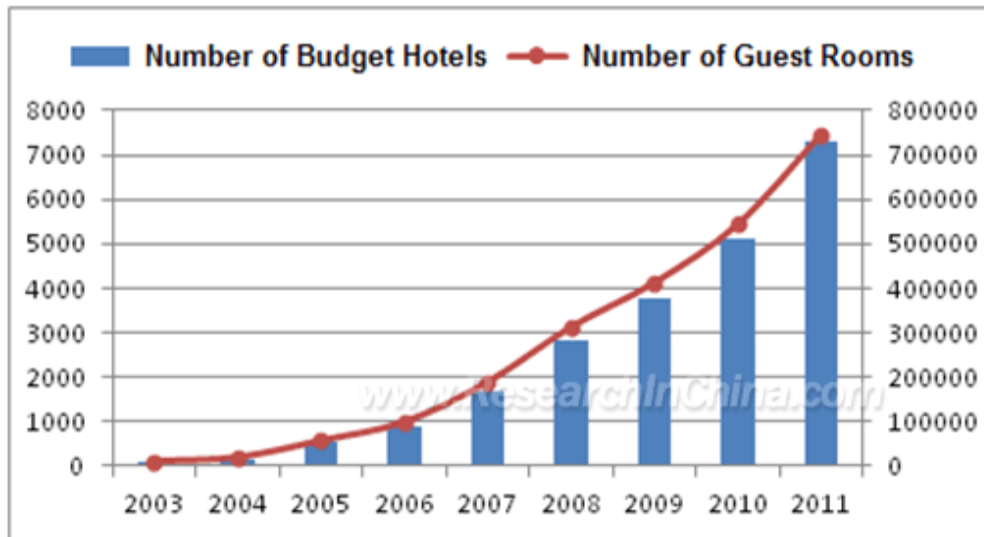
INFORMATION SOURCES

The primary information sources include NBS (National Bureau of Statistics of China), China Customs and annual reports of listed companies etc.

Abstract

Chinese budget hotel industry has been in a period of high-speed growth since 2006. In 2011, the market size climbed 45.5% YoY to RMB26 billion; the number of budget hotels hit 7,314, a rise of 42.85%, involving 747,045 guest rooms, up by 37.27%.

Number of Budget Hotels and Guest Rooms in China, 2003-2011



Source: www.hostelcn.com, ResearchInChina < China Budget Hotel Industry Report, 2011-2012 >

At present, Chinese budget hotel enterprises are still in the “big but not strong” stage. Take market share for example, the total revenue of hotels in China has a concentration ratio (CR4) just 37% in 2011. As the Chinese budget hotel market is far from being saturated, fast expansion in future competition is primarily conducted through franchise chain and mergers & acquisitions.

Home Inns: Following the acquisition on Motel 168 in May 2011, Home Inns triumphantly purchased E-inn Express Hotel on July 2, 2012. Through the two acquisitions, its regional distribution pattern got further optimized. As of Q1 2012, Home Inns has had 1,479 hotels, including 702 outlets and 777 franchisees.

7 Days Inn: On December 31, 2011, 7 Days Inn completed the acquisition on Huatian Star, with the hotel number reaching 1,044 inclusive of 417 outlets, 627 franchisees and altogether 104,101 guest rooms, spreading across 162 cities in China. In 2012, the company will gear the long-term development strategy towards the rapid expansion model centered by franchisement, raise the goals for setting up franchisees from 240 to 320, and reduce the outlet open-up from 120 to 80.

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Hanting Inns & Hotels: in June 2012, Hanting Inns & Hotels held the mid-range hotel chain Starway Hotel. By the end of Q1 2012, Hanting has owned 675 hotels, involving 353 outlets and 322 franchisees.

China Budget Hotel Industry Report, 2011-2012 mainly covers the followings:

- Scale, operation, development and competitive landscape of Chinese budget hotel industry;

- Analysis on the budget hotel markets in 14 major cities around China, such as Shanghai, Beijing, Hangzhou, Shenzhen, Guangzhou, etc.;

- Analysis on 26 key budget hotel firms, consisting of 11 national ones such as Home Inns, 7 Days Inn, Hanting Inns & Hotels and Jinjiang Hotels, as well as 15 regional ones like Xilong Hotel, Holiday Inn Express and Holiday Inn Express Zhengzhou Zhongzhou.

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