China Budget Hotel Industry Report, 2011

Oct. 2011

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- **Analyzes the development of China budget hotel industry .**
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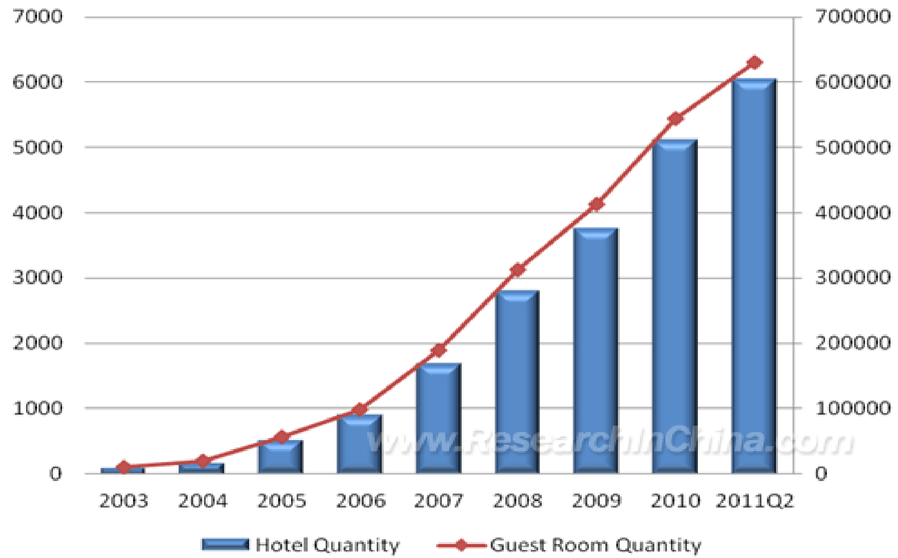
Abstract

As of Q2 2011, there have been a total of 6,407 budget hotels in China, an increase of 534 compared with Q1, up 6.69%; the total number of guest rooms has reached 630,382, an increase of 48,810 compared with Q1, up 8%.

Quantity of Budget Hotel and Guest Room in China, 2003-2011



Source: Budget Hotel Association; ResearchInChina

China Budget Hotel Industry Report, 2011 mainly covers the following aspects:

- Scale, competition pattern, direct selling / distribution / e-commerce marketing size, average guest room rate and occupancy rate of China budget hotel industry.

- Analysis of budget hotel market in China's 14 major cities, including Shanghai, Beijing, Shenzhen, Hangzhou, Guangzhou, Nanjing, Wuhan, Tianjin, Suzhou, Xi'an, Zhengzhou, Jinan and Shenyang.

- Analysis of 29 major budget hotel enterprises, including Home Inns, 7Days Inn, Jinjiang Inn, Hanting Inns & Hotels, Motel 168, Green Tree Inn Chain, Super 8 Hotel, Ibis Hotel, Vienna Hotel, City Comfort Inn, Xilong Hotel, Hotel Home, Joy Inn, Orange Hotel, Thankyou Hotel, Holiday Inn Express, Shindom Inn, WHWH Hotel, Golden Lion 100 Supermarket Hotel, Nanyuan Inn, City Inn, Huatian Inn, Garden Inn, Huakun Hotel, Ane 158 Hotel, Grace Inn, Holiday Star Hotel, Jin's Inn and 99 Inn.

In Q1 2011, the top six Chinese cities with the highest density of budget hotel were Shanghai, Beijing, Shenzhen, Hangzhou, Guangzhou and Nanjing, where the budget hotels in operation totaled up to 1,987, accounting for 36.04% of China's total budget hotels, up 4.36% compared with the end of 2010; guest rooms totaled up to 218,486, accounting for 37.54% of the total, up 3.76% compared with the beginning of 2010.

In June 2011, Home Inns acquired Motel Inn, ranking the first with the market share of 23.12% (calculated by the number of guest rooms), successively followed by 7Days Inn, Jinjiang Inn, Hanting Inns & Hotels, Green Tree Inn Chain and Super 8 Hotel, while other budget hotels held 31.88% of the total market.

Home Inns: As of Q2 2011, altogether 934 Home Inns hotels have been put into operation, each with 114 guest rooms on average. In May 2011, Home Inns officially acquired all stakes of Motel 168 International Holdings Limited. It plans to open 280 new hotels in 2011, of which 45%-50% will be located in third and fourth-tier cities.

7Days Inn: As of Q2 2011, altogether 722 7Days Inn hotels have been put into operation, including 341 regular chains and 381 managed hotels, with a total of 72,150 guest rooms. In July 2011, 7Days Inn acquired all stakes of Hunan Huatian Inn Management Co., Ltd. with RMB136 million cash. In the next three years, its hotel quantity in China will reach 1,800, wherein the quantity of managed stores will expand to 1,000.

Hanting Inns & Hotels: In Q2 2011, Hanting Inns & Hotels newly added 43 hotels (22 regular chains and 21 franchise hotels), with the total number of hotels up to 516 and guest rooms up to 58,786, moreover, other 90 regular chains and 111 franchise hotels are under planning. It plans to open 240 to 250 new hotels in 2011, including 40 to 50 hotels under the brands of Seasons Hotel and Hi Inn, two new brands of Hanting Inns & Hotels, mainly focusing on first and second-tier cities.

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