

# China Budget Hotel Industry Report, 2011-2012



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## China Budget Hotel Industry Report, 2011-2012

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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%.

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.

**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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