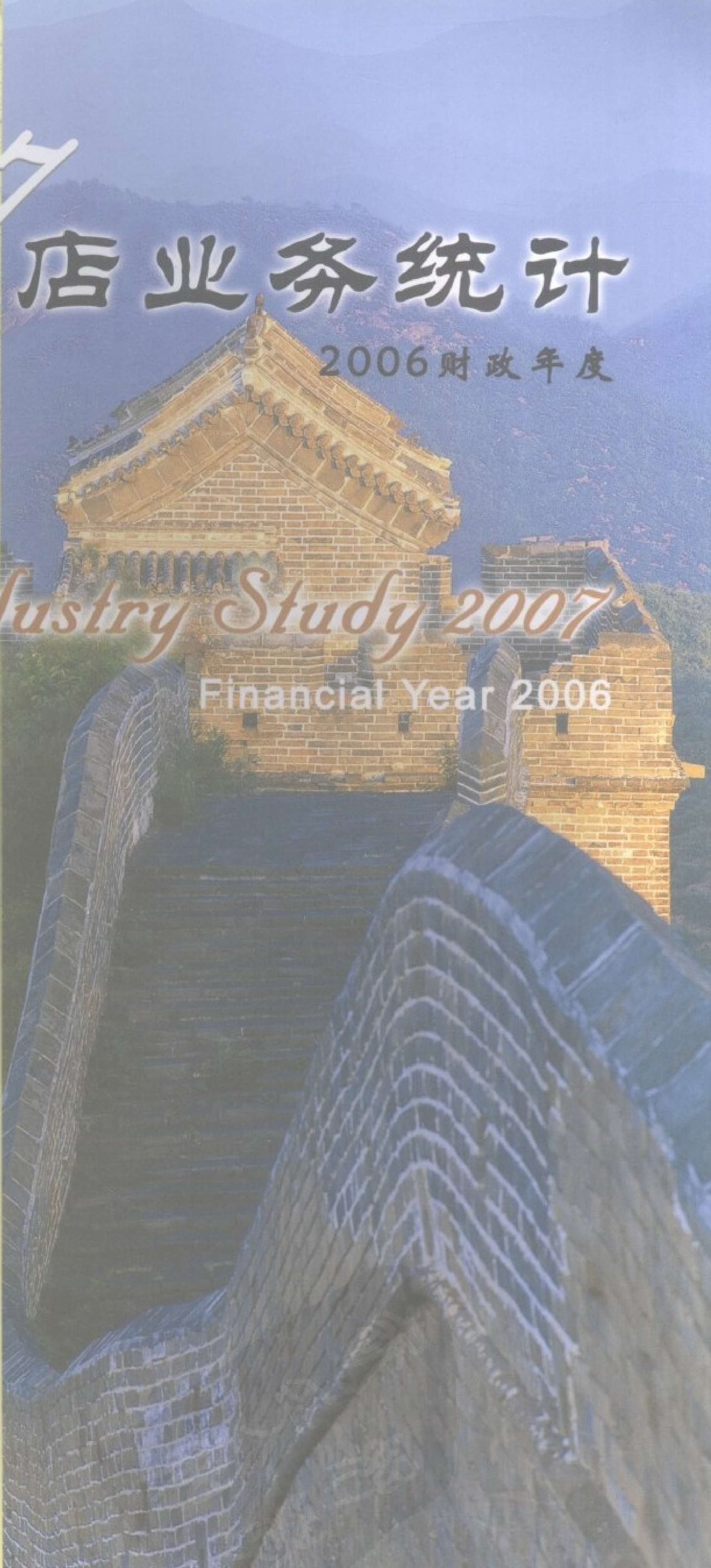
2007 中国饭店业务统计

2006财政年度

China Hotel Industry Study 2007

Financial Year 2006



中国旅游饭店业协会
China Tourist Hotels Association

Horwath HTL 浩华
Hotel, Tourism and Leisure 酒店及旅游业顾问

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中国旅游出版社
China Travel & Tourism Press

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中国旅游饭店业协会
China Tourist Hotels Association

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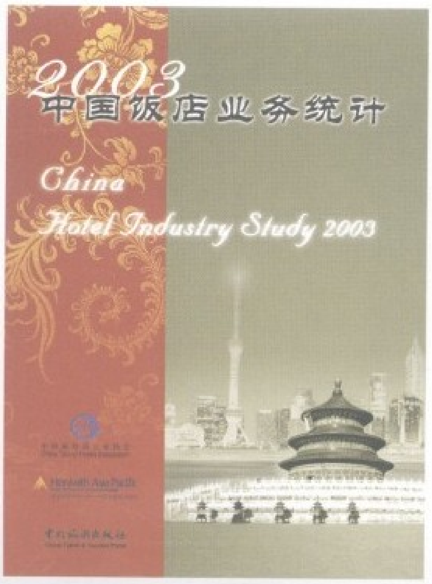
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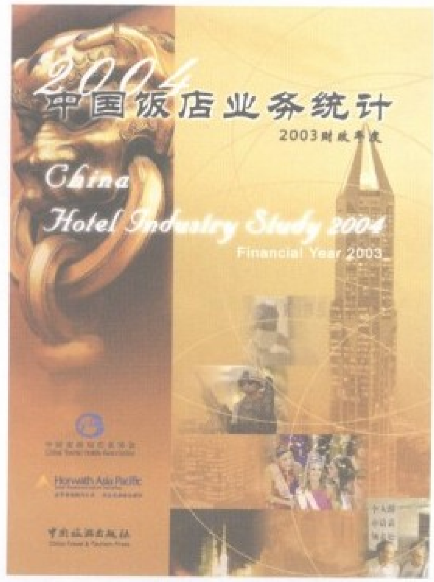
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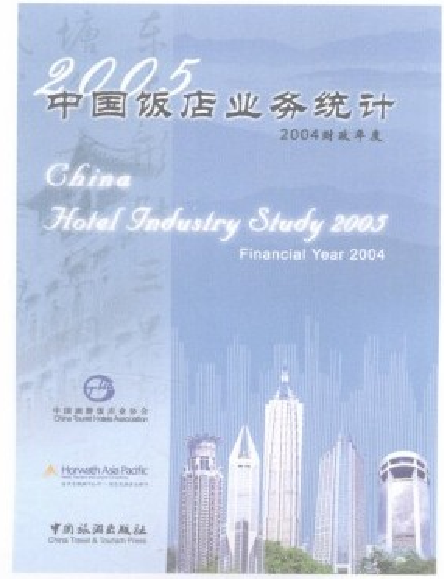
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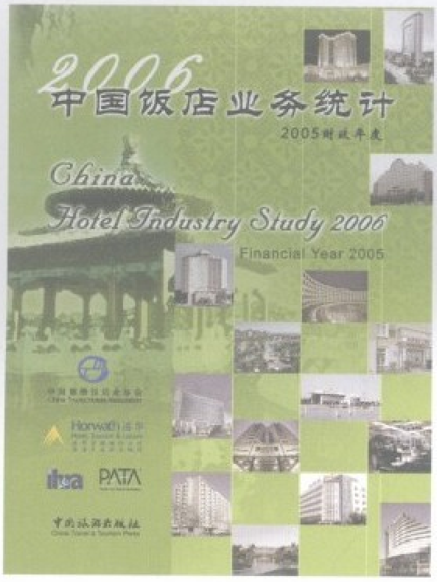
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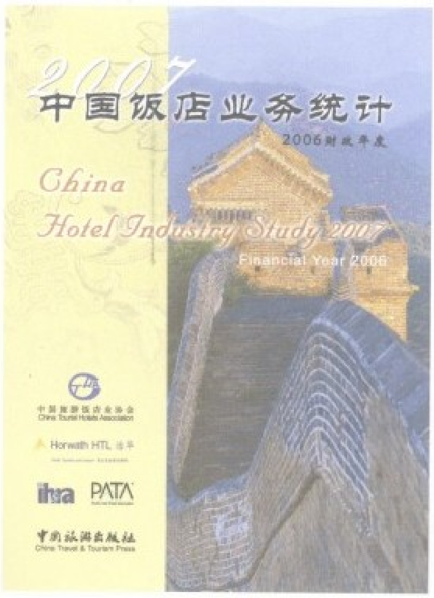
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中国旅游饭店业协会
China Tourist Hotels Association

中国旅游饭店业协会成立于1986年2月，是由中国境内的旅游饭店和地方饭店协会、饭店管理公司、饭店用品供应厂商等相关单位，按照平等自愿的原则组成的全国饭店行业协会。中国旅游饭店业协会的主管单位为国家旅游局，宗旨是在主管单位的指导下，为会员服务，为行业服务，在政府与会员之间发挥桥梁和纽带作用，为促进我国旅游饭店业的健康发展做出积极贡献。协会现有会员2800家，为会员提供的服务包括：促进旅游饭店间的经验交流，收集国内外饭店业的信息，组织开展饭店培训、研讨、考察活动，并开展与海外饭店餐馆协会等相关行业组织之间的交流与合作。

China Tourist Hotels Association (CTHA) was founded in February 1986. Organized under the supervision of China National Tourism Administration (CNTA), CTHA is a national-wide professional association whose 2,800 memberships comprise of domestic hotels, local hotels association, domestic and international hotel management groups and hotel suppliers. CTHA's objective is to provide services for its members, bridge the government and its members and to promote healthy development of China hotels and tourism industry. CTHA's services include: strengthening the communications of its members, collecting information on the domestic and international hotel markets, providing hotel training programs and forums and liaising with overseas hotel & tourism organizations such as International Hotel & Restaurant Association.

Horwath HTL 浩华

Hotel, Tourism and Leisure 酒店及旅游业顾问

浩华创立于1915年，是全球规模较大、历史最悠久的酒店及旅游业顾问公司，也是第一家进入中国市场的专业化国际性酒店及旅游业顾问公司。浩华早于20世纪50年代制定了《统一饭店会计制度》，成为国际饭店业通行的会计标准，为全球饭店业所使用。浩华的核心顾问服务领域包括：市场及财务可行性研究、资产评估、推荐酒店管理公司、管理合同谈判、酒店开发项目资金筹划及融资中介、大型旅游地项目规划、资产管理和运营顾问等。至今，浩华在亚太区所完成的项目达2,000多个，其中超过250项在中国境内完成。经过长期的积累和发展，浩华已成为酒店、旅游和休闲产业杰出的顾问公司。浩华的每一个项目都是本地经验和国际视角的完美结合，在国际平台上向全球各地的客户提供此领域无以比拟的经验和专长。

Founded in 1915, Horwath International is an integrated professional organization of accounting and management consulting firms with world's largest and oldest professional hotel and tourism consultancy practice. Horwath has more than 280 offices throughout the world and was the first to establish a professional hotel consultancy practice in the China market. In the 1950s, Horwath paved the way by creating the Uniform Systems of Accounts for Hotels, a system so successful it has become the standard in hospitality accounting around the world. Horwath HTL's core services include market and financial feasibility studies, management company search and contract negotiation, project financing assistance, destination tourism planning, asset management and operations advisory. Horwath HTL has been involved with over 2,000 hotel and tourism projects in the Asia Pacific region, including over 250 projects in China.

中国旅游饭店业协会
China Tourist Hotels Association

浩华管理顾问公司
Horwath HTL

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《2007 中国饭店业务统计》经中国国家旅游局、国家统计局批准许可
“China Hotel Industry Study 2007” is approved by National Tourism Administration and National Bureau of Statistics of the People’s Republic of China

2007 中国饭店业务统计
China Hotel Industry Study 2007

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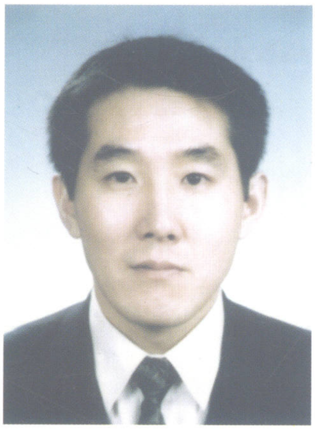


在业界同仁的期盼中，《中国饭店业务统计》第五个年度刊物——《2007 中国饭店业务统计》（2006 财政年度）全新出炉。这本刊物继续得到中国酒店业界同仁的鼎力支持，凝聚了 492 家三星级以上酒店和 250 家经济型酒店的综合统计数据。

2006 年，中国各地酒店市场表现出了各不相同的市场特征。许多城市新酒店的陆续开业，为当地酒店市场注入了新的活力，并在一定程度上提升了房价的深度，而在一些市场，酒店市场的整体业绩却受到了短期内新酒店供给速度过快的负面影响。

《2007 中国饭店业务统计》继续保持过去五年来统计指标的延续性，便于业内人士追踪和分析历史统计数据。此外，秉承持续改进的目标，《2007 中国饭店业务统计》也再次充实了新的内容，包括客房设施构成比例和面积的信息。随着此刊物在业内的影响力不断增强，支持此项统计研究的荣誉顾问团成员从去年的 24 家增加至今年的 33 家，国际酒店业权威机构——国际酒店及餐馆协会以及太平洋亚洲旅游协会也为该刊物提供倾力支持。

最后，代表协会再次感谢国家旅游局、中国旅游饭店业协会会员单位、国内和国际酒店管理集团以及各单体酒店一如既往的支持！我也代表协会特别感谢 33 家酒店管理集团荣誉顾问的倾力协助！希望这本刊物能够为您的业务发展提供启发和参考！

I am pleased to present once again the "China Hotel Industry Study 2007", which is in its fifth consecutive year of publication. As with the previous years, this study continues to receive overwhelming support from the industry 孝a total of 492 responses were received from 3- to 5-star hotels and another 250 responses from budget properties.

In 2006, many new hotels opened all across China and they were noted to have different impacts on different markets. In some markets, they were invigorating as they effectively raised market ceilings on service standards and the quality of hotel facilities, which in turn led to increases in room rates. On the contrary, the opening of new hotels in some markets has resulted in an over-supply of rooms in the short term, thus causing room rates to drop.

The "China Hotel Industry Study 2007" continues to ensure that industry data is made available for analytical and benchmarking purposes. This year, we have improved on the study by providing more information, such as an aggregated breakdown of room type and size. I believe that the study's reach and influence has reached new heights and this is reflected in the number of Honorary Advisory Board Members for the study, which has increased from 24 domestic and international hotels groups to a total of 33 this year. I am also grateful for the full endorsement of the International Hotel & Restaurant Association (IHRA) and Pacific Asia Travel Association (PATA).

Finally, I would also like to thank the China National Tourism Administration (CNTA), members and secretariats of the China Tourist Hotel Association (CTHA) and all the hotels that have participated in the study. My heartfelt thanks are also extended to the 33 Honorary Advisory Board Members who have endorsed and supported this important industry effort. I trust that you will find this study very comprehensive and informative.

侣海岩

侣海岩 会长
中国旅游饭店业协会
Lv Hai Yan　President
China Tourist Hotels Association

I am very honoured to present once again our annual publication, "China Hotel Industry Study 2007". This is the fifth consecutive year that we are putting together the most extensive survey of hotel operations in China and I am very pleased by the overwhelming support that we have received with the participation from a total of 492 star rated hotels this year, plus the participation of major domestic chains adding a further 250 properties to the study.

I am truly encouraged by the demonstrated willingness of industry professionals to share information for the purposes of tracking industry performance and benchmarking. I am particularly encouraged by the growing number of responses that we have received each year over the past five years, which is clearly indicative of the growing support from the industry for this important study.

Finally, I want to thank the China Tourist Hotel Association (CTHA) and the China National Tourism Administration (CNTA) for their continued confidence and support. We also thank the hotels and hotel groups that have participated in the survey and we look forward to the industry′s continuing support next year.

我再次荣幸地向中国饭店业界同仁奉上我们最新的年度统计刊物——《2007中国饭店业务统计》，这已经是我们连续第五年针对中国饭店运营状况进行的最广泛、最详尽的调查研究。非常高兴，本年度我们再次得到中国饭店业界的大力支持，共有492家星级饭店和250家经济型饭店参与到了本年度的调查研究。

更加令人鼓舞的是，中国饭店业界同仁积极参与、坦诚分享的姿态，共同促进了本刊物的成长。通过参与此项年度调查研究，各饭店本身乃至整体行业均可享有颇具权威性的标杆比较数据，并使所有业界同仁及相关机构都能够充分了解饭店行业的发展轨迹。在过去5年中，参与此项调查研究的饭店数量逐年递增，充分说明了中国饭店业界对本刊物的重视程度与日剧增。

最后，我谨代表浩华管理顾问公司，感谢中国旅游饭店业协会和中国国家旅游局五年来给予本刊物一贯的信任和支持。我也借此机会诚挚地感谢热心参与本年度统计研究的所有饭店，并期待着您一如既往的支持！

Robert Hecker

罗伯特·赫克 执行董事
浩华管理顾问公司
Robert Hecker Managing Director
Horwath HTL

经过数月的精心准备，我们荣幸地向业界再次奉上这份中国饭店行业最专业、最详尽的年度统计研究刊物——《2007 中国饭店业务统计》。浩华管理顾问公司与中国旅游饭店业协会连续第五年通力合作，汇总和分析了来自中国各地区饭店的运营数据，并将这一研究成果融入到这份权威性刊物中。

今年，中国旅游饭店业协会和浩华管理顾问公司共收到492家星级饭店的回复问卷。最终，471家饭店的有效数据（部分饭店数据填写不完整，最终未予以选用）被采用，合计覆盖客房总数达133,000间。被采用的有效数据中，包括172家（约占37%）五星级饭店，205家（约占44%）四星级饭店，94家（约占20%）三星级饭店。今年，提供有效数据的饭店总数较上年增长了10%。经济型饭店涵盖了250家国内主要经济连锁酒店的经营统计数据。

《中国饭店业务统计》部分重要成果与结论摘要如下：

总体业绩

统计结果显示，2006年大部分星级饭店的房价水平保持稳定。其中五星级饭店实现的平均房价为人民币792元，四星级饭店为人民币437元，三星级饭店为人民币278元，经济型饭店为人民币152元。与2005年相比，五星级饭店的平均房价水平下降了2%，三星级饭店增长了4%，四星级饭店的房价水平未见显著变化，经济型饭店的平均房价大幅下降了16%。

2006年，星级饭店市场的住宿率水平与去年大体持平，其中五星级饭店的住宿率为66%，四星级和三星级饭店为69%，经济型饭店为88%。五星级饭店的平均每房间收益（RevPAR）为人民币525元，与2005年同期相比，下降了5%，经济型酒店的平均每房间收益为人民币165元，下降了20%，四星级饭店的此项运营指标稳定在人民币303元左右，三星级饭店为人民币192元，同比增长了3%。

在五星级饭店市场中，国际管理饭店的经营业绩保持相对稳定，2006年实现的平均房价为人民币940元，相比2005年降幅不到1%，住宿率水平为67%，较上年下降了4%，相应地，平均每间房收益水平下降了5%。

但是，其他管理模式下的饭店，在经营业绩上却较上年发生了较大的变化。国内管理模式下的饭店表现更为突出。但是，我们在对照比较此模式下饭店2005年和2006年经营业绩时，应该注意到样本数据的变化。2006年，共有45家国内管理模式下的饭店参与了问卷调查，而2005年仅有24家。显然，在国内管理5星级饭店类别里，样本饭店数量的变化以及更多位于二线和三线城市的饭店参与了问卷调查直接对2006年度该类别饭店的总体平均房价构成了一定影响。公平地说，该类别的饭

I am honoured to present the results of our annual publication, "China Hotel Industry Study 2007", which is the most extensive and detailed survey of hotel operations in China. For the fifth consecutive year, Horwath HTL has, in co-operation with the CTHA, collected and compiled data from hotels all over China to put together this authoritative study.

This year, we received 492 responses from star-rated hotels out of which 471 responses with approximately 133,000 rooms were used in our study. Some responses were excluded due to incomplete data. Of the usable responses, 172 of them (37 percent) were rated 5-star, 205 (44 percent) rated 4-star and 94 (20 percent) rated 3-star. The total number of usable responses represents a 10 percent increase over last year's level of participation. As for the budget category, the participation of major domestic budget chains translated into the inclusion of data of 250 properties.

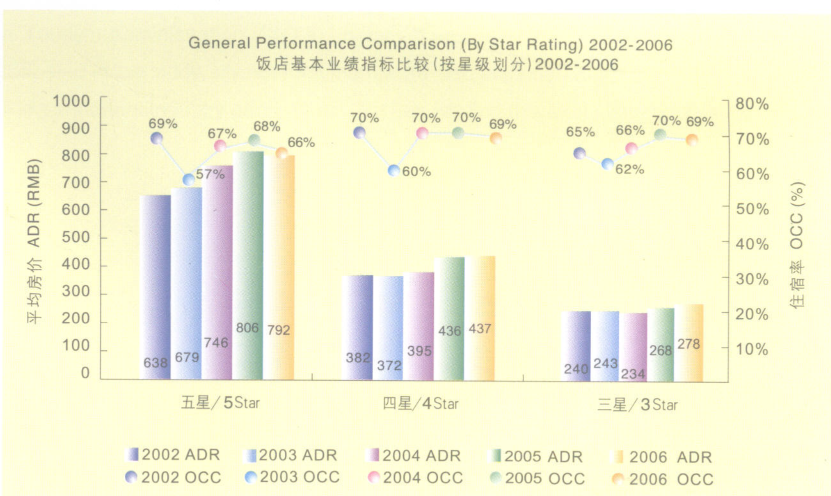
Some of the major findings of the survey are presented below:

General Performance

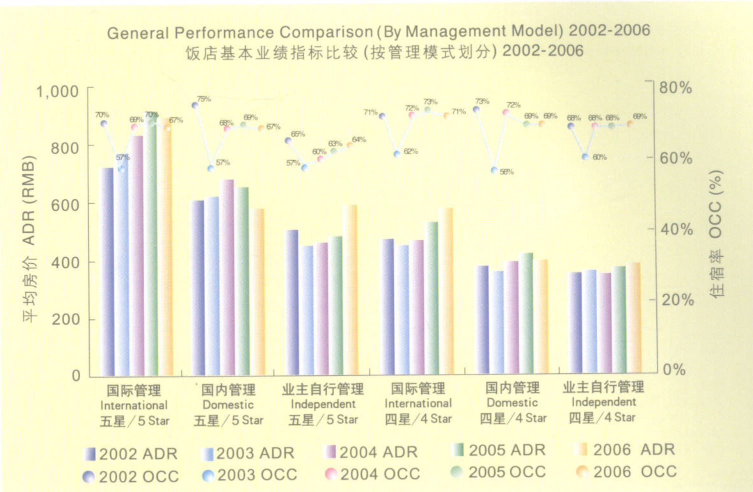
The rate performance of most hotels in 2006 when grouped by star ratings has remained fairly stable with 5-star hotels achieving an ADR of RMB 792; 4-star properties, RMB 437; 3-star properties, RMB 278 and; budget properties, RMB 152. When compared to the rate levels in 2005, these reflect year-on-year (Y-o-Y) changes of -2 percent and 4 percent for 5 and 3-star hotels respectively while no change was noted for 4-star hotels. Budget properties registered the largest decline of -16 percent.

In terms of occupancy levels, these have also stabilized with respect to past year's performance. Five-star hotels ended the year with an occupancy level of 66 percent; 4-star hotels, 69 percent; 3-star hotels, 69 percent and; budget properties, 88 percent. Consequently, the RevPAR of 5-star hotels registered a Y-o-Y decline of 5 percent to reach RMB 525 and budget properties dropped by 20 percent to reach RMB 165. On the other hand, the RevPAR of 4-star hotels stabilized at RMB 303 and that of 3-star hotels increased by 3 percent to reach RMB 192.

Within the five-star category, internationally managed hotels posted a fairly consistent performance level. They achieved a rate of RMB 940 in 2006, a Y-o-Y decrease of less than 1 percent, with occupancy stabilizing at 67 percent, a Y-o-Y decrease of 4 percent; consequently, RevPAR dropped by 5 percent.



General Performance Comparison (By Star Rating) 2002-2006
饭店基本业绩指标比较（按星级划分）2002-2006



店总体平均房价业绩趋势并不见得是下降的。

值得注意的是，在所有参与调查的饭店中，上海的一家五星级饭店首次突破了平均房价300美元的上限。与此同时，平均房价超过250美元的酒店数量由3家增长至5家，其中4家位于上海，1家位于北京。2006年，上海五星级饭店的整体住宿率水平为69%，尽管较上年下降了3%，但其平均房价水平仍处于中国饭店行业的领先地位。

四星级饭店中，国际管理饭店再次实现了最高的平均房价水平，达到了人民币578元，较上年增长了7%。这种增长水平也拉大了其与国内管理饭店（高出人民币元178元或45%）及业主自行管理饭店（高出人民币217元或增长60%）之间的平均房价差距。

赢利能力

2005年，只有五星级饭店实现了赢利增长。2006年，上述情况发生了些许变化，五星级的盈利水平有所下降，按每间房计算的管理费及固定费用前收益减少了人民币5,129元，较上年下降了3%。其中，国内管理的五星级饭店降幅最大，与上年同期相比，该指标下降了14%或人民币16,909元。相反，按每间房计算，业主自行管理的五星级饭店的管理费用和固定费用前收益跃升了28%，从而有效缓解了整体市场收益水平的下降幅度。

值得关注的是，除天津市/山东省外，中国其他主要客源市场五星级饭店的赢利能力均有所下降。北京、江苏/浙江五星级饭店市场的平均每间房管理费和固定费用前收益下降了约1%，同样是该项指标，上海五星级饭店市场下降了2%，下降最明显的地区是广州/深圳和三亚的五星级饭店市场，分别下降了54%和26%。

在所有星级饭店中，客房部仍旧是主要的收入来源部门，占饭店总收入的54%至56%。经济型饭店因餐饮设施有限，因此客房收入在总收入中占据了高达85%的份额。

餐饮收入是星级饭店的第二大收入来源。五星级和四星级饭店的餐饮收入分别占饭店总收入的37%和38%；三星级饭店的餐饮收入所占比例更高，达到了46%；但经济型饭店的餐饮收入仅为总收入的13%。

Greater changes were, however, noted in the performance of hotels across other management models. This is especially true for domestically managed hotels. However, when making comparisons between 2005 data and 2006 data, it is very important to note the changes in the sample base of data. This year, 45 domestically managed 5-star hotels participated in the survey compared to only 24 for last year. Such a change makes it difficult to compare results and the inclusion of more hotels in secondary and tertiary cities has no doubt had an impact on the overall average room rate for the domestic 5-star category. I think it would be fair to say that the underlying room rate performance for this category has not been negative.

It is also worthwhile to note that for the first time in the history of China′s hotel performance, a 5-star hotel in Shanghai broke the USD 300 rate ceiling. At the same time, the number of hotels that were able to achieve an average rate of more than USD 250 increased from three to five properties with four in Shanghai and one in Beijing. This continues to reaffirm Shanghai′s position as the leading Chinese city in terms of rate performance although its overall 5-star occupancy level dropped by about three percentage points in 2006 to reach 69 percent.

Within the four-star category, internationally managed hotels continue to generate the highest room rates at RMB 578, which represents a Y-o-Y increase of 7 percent. This increase further widened the rate gap of these hotels when compared to domestically managed 4-star properties (RMB 178 or 45 percent higher) and independently managed 4-star properties (RMB 217 or 60 percent higher).

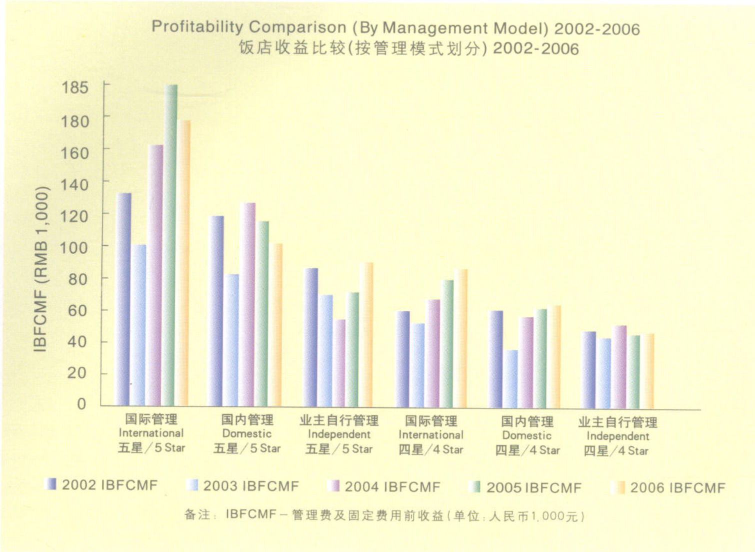
Profitability

In 2005, only five-star properties experienced growth in their profitability levels. However, in 2006, the situation was reversed with five-star properties experiencing a decline in profitability, albeit a small one of RMB 5,129 (3 percent) in terms of income before fixed charges and management fees (IBFCMF) per available room. The most notable decline was observed of five-star hotels that are managed domestically. These hotels registered a Y-o-Y decline of 14 percent or RMB 16,909 on a per available room basis. On an overall basis, this decrease was eased by a large improvement in the profitability of independently managed 5-star hotels with IBFCMF jumping by 28 percent in 2006.

It is interesting to note that with the exception of Tianjing/Shandong, profitability levels across all other key 5-star markets have dropped. The IBFCMF of five-star hotels in Beijing and Jiangsu/Zhejiang fell by about 1 percent while that of five-star hotels in Shanghai dropped by 2 percent. The largest declines were observed for the five-star markets of Guangzhou/Shenzhen and Sanya at 54 and 26 percent respectively.

Across the different star ratings, the rooms department continued to be the main revenue generator by accounting for between 54 to 56 percent of total revenue for star-rated hotels. For budget properties, which typically have much leaner food and beverage operations, room revenue accounted for as high as 85 percent of their total revenue.

Second in importance for star-rated hotels was the revenue generated from food and beverage department. This represented 37 and 38 percent of total revenue for 5 and 4 star properties respectively.



客源构成

就客源结构而言，商务客源仍然是各饭店住宿需求的主体。2006年，国内商务客源成为饭店最重要的需求客源，分别占五星级、四星级、三星级饭店需求总量的27%，32%和31%。各管理模式下的饭店，国际商务客源在总需求中所占比例均小于15%。然而在国际管理饭店中，国际商务客源占据了较大的比例，分别占五星级和四星级饭店需求总量的24%和27%。

国内客源是经济型饭店最重要的客源主体，平均每10个住宿需求中有9.6个需求来自国内客源。此外，国内商务客源占经济型饭店总需求的47%，远远高于其他星级饭店中的客源比重，此外，国内休闲旅游客人所占比例为24%。

在各类需求客源市场中，国际商务客源仍然是最高平均房价的贡献者，在五星、四星和三星级饭店中，此类客源贡献的平均房价分别为人民币1,024元、618元和399元。相比去年，则分别下降了10%（五星级）和18%（四星级）。

另一方面，国内旅游团队依然是各需求市场中平均房价最低的客源体，需求所占比例为6%至8%。此类客源在五星级、四星级和三星级饭店中实现的平均房价分别为人民币508元、271元和168元。

人事统计

2006年，按每间可供出租客房计算，星级饭店的人工配比值有所上涨，五星、四星和三星级饭店的人工配比值分别为1.83、1.59和1.44。与2005年相比，五星级和四星级饭店的人工配比值略微提升了2%，三星级饭店则稍稍下降了2%。国际管理饭店的人工使用相对高效，按每一可供出租客房计算的人工配比值较低。尤其是国际管理的五星级饭店，该比值保持在1.67，国内管理和业主自行管理的饭店的该项指标一般高于2.0。

订房渠道

与往年一致，直接预订仍是旅客订房的主要方式。尽管旅行社订

For 3-star hotels, they accounted for an even higher proportion of total revenue at 46 percent. However, for budget hotels, they represent only 13 percent of total revenue.

Source Markets

In terms of source market composition, corporate guests continue to be the main generator of room nights for all categories of hotels. More specifically, in 2006, domestic corporate guests were observed to form the single most important source of demand for all star-rated hotels by accounting for 27 percent, 32 percent and 31 percent of overall room nights of demand for 5, 4 and 3-star hotels respectively. Foreign corporate guests typically accounted for less than 15 percent of total room nights of demand across the various management models. They are, however, observed to generate a more significant proportion of room nights for internationally branded hotels by accounting for 24 percent and 27 percent of overall demand in such five and four-star hotels respectively.

Domestic guests were of the greatest importance to the budget sector - for every 10 budget room nights of demand, 9.6 of them were sold to domestic guests. Domestic corporate guests, in particular, generated 47 percent of the total budget demand, which is significantly higher than that of all categories of star-rated hotels, while domestic leisure direct/FIT guests contributed 24 percent.

Foreign corporate guests continued to command the highest room rates across all the source markets at RMB 1,024, RMB 618 and RMB 399 for 5, 4 and 3-star hotels respectively. However, the rates that this source market generated did not grow in 2006. In fact, room rates by foreign corporate guests went through a negative Y-o-Y growth of 10 and 18 percent each for 5 and 4-star hotels.

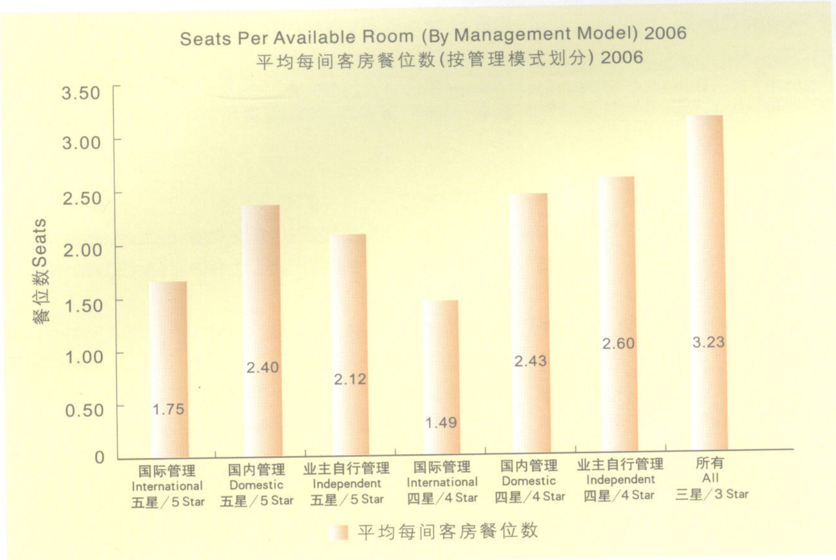
On the other extreme, domestic tour groups remained as the lowest rate generator across all the source markets while accounting for between 6 to 8 percent of total room nights of demand. For 5-star hotels, they were able to generate a rate of RMB 508; for 4-star hotels, RMB 271 and; 3-star hotels, RMB 168.

Labour Statistics

In 2006, the total number of hotel staff per available room was 1.83, 1.59 and 1.44 for 5, 4 and 3 star hotels respectively. These represented slight increases of above 2 percent each for 5 and 4-star hotels and a slight decrease of 2 percent for 3-star hotels when compared to 2005 levels. The relative efficiency of internationally branded hotels was evident as they continued to employ fewer personnel on a per available room basis. In particular, international 5-star hotels were able to keep their labour efficiency at 1.67 staff per available room while domestically and independently managed hotels both employed more than two personnel per available room.

Advanced Reservations

As was the case during the previous years, direct inquiry continued to be the main method through which hotel guests made their reservations. Direct inquiry accounted for more than 30 percent of total demand across all rate categories although tour agents and operators continued to be very important in the 5-star markets of



房是北京、广州/深圳和三亚五星级饭店中的重要订房渠道，但直接订房需求仍占到了总需求客源的30%以上。在上述三个主要市场中，相比直接订房，旅行社订房占据了较高比例。尤其是在度假胜地三亚，旅行社订房占总客源需求的60%，较2005年增长了4%。

紧随上述两种订房渠道的是通过第三方网站预订，如：携程、易龙。尽管通过第三方网站订房对于不同类型饭店（包括经济型饭店在内）的重要性各不相同，但是通过这种渠道实现的客房预订在各星级酒店均有不同程度的增长。对于国内管理和业主自行管理的四星级饭店而言，通过第三方网站订房的客源约占总客源需求的四分之一，分别较上年增长了11%和8%。

餐饮统计

按每一可供出租客房均摊餐位数计算，国际管理五星级和四星级饭店的指标最低。考虑到国内管理和业主自行管理饭店经营着类型更为广泛的餐饮设施，因此，按每一可供出租客房计算的餐位数值超过了2。尽管如此，国际管理饭店持续实现了明显高于其它饭店的人均餐饮消费，国际管理五星级饭店的人均餐饮消费为人民币376元，而国内管理和业主自行管理饭店的该项指标分别为人民币97元和114元。国际管理四星级饭店的人均餐饮消费为人民币95元，而国内管理和业主自行管理饭店人均餐饮消费分别为人民币66元和80元。

未来预测

五星级和四星级饭店的经营者对未来饭店业住宿率的预测看法略有不同，预测住宿率水平有所增长的饭店经营者的数量略高于50%。三星级饭店经营者对未来的预测略显保守，47%的受调查饭店预测未来住宿率将有所增长。与此类似，五星级饭店经营者中有57%对未来平均房价增长持乐观态度。总体而言，这反映出自2004年起，中国饭店业经营者对住宿率和房价水平的乐观程度在逐渐降低。

再次感谢所有为《中国饭店业务统计》贡献统计数据的饭店。同时感谢中国旅游饭店业协会和中国旅游出版社连续5年对这本刊物矢志不渝的支持，从而使这一意义深远的研究刊物得以再次成功出版！

Beijing, Guangzhou/Shenzhen and Sanya. In these three key markets, a greater proportion of advanced reservations came through tour agents and operators when compared to reservations received through direct inquiry. For the resort destination of Sanya, this is especially significant as tour agents and operators accounted for 60 percent of total demand, up by 4 percentage points relative to 2005.

Following close on the heels of these two reservation methods was the use of third-party Internet sites, such as Ctrip and Elong. Even as the importance of this method of reservation varied across the different types of hotels, including budget properties, the use of this method of reservation was noted to have increased across all categories of classification, albeit to varying extents. For domestically and independently managed 4-star hotels, they accounted for almost one-quarter of total demand to reflect increases of 11 and 8 percentage points respectively.

Food & Beverage

At 1.75 and 1.49 seats per available room, international 5 and 4-star hotels continued to have the leanest food and beverage operations. All domestic and independent hotels each operated more extensive food and beverage operations with more than 2 seats per available room. Despite this, internationally branded hotels continued to achieve significantly higher average food and beverage checks: international 5-star hotels recorded an average check of RMB 376 per cover compared to RMB 97 and RMB 114 for domestic and independent 5-star hotels while international 4-star hotels recorded an average check of RMB 95 per cover compared to RMB 66 and RMB 80 for domestic and independent 4-star hotels.

Industry Outlook

When asked about their outlook for 2007, 5 and 4-star hotels were almost equally divided about changes in occupancy performance with just slightly more than half of the respondents anticipating an increase in the coming year. Three-star hotels were less optimistic with 47 percent of total respondents also anticipating an increase. In a similar manner, 5-star hotels were the most upbeat about rate improvements with 57 percent of them indicating an optimistic outlook. Overall, this reflected a trend of waning optimism as the proportion of hotels forecasting occupancy and/or rate increases has been decreasing gradually since 2004.

We would like to thank all the hotels that have participated in this year´s study. We would also like to extend our heartfelt appreciation to the CTHA and China Tourism Press for their fifth consecutive year of unwavering support in bringing this study to the industry.

李达明　董事，首席代表 - 中国
浩华管理顾问公司
Damien Little
Director, Chief Representative - China
Horwath HTL

统计表 STATISTICAL TABLES
表 1 饭店业务摘要 (2006/2005)

2006

饭店业业务摘要	以平均房价分类 By Average Room Rate				以主要市场分类 By Key Market					
	¥701 以上 Above ¥701	¥501~700 Between ¥501~700	¥301~500 Between ¥301~500	¥300 以下 Below ¥300	北京 Beijing 五星/5Star	上海 Shanghai 五星/5Star	广州 + 深圳 GZ+SZ 五星/5Star	三亚 Sanya 五星/5Star	江苏 + 浙江 JS+ZJ 五星/5Star	天津 + 山东 TJ+SD 五星/5Star
饭店数量	79	86	158	140	26	23	7	7	28	10
每日可供出租客房数	32,946	28,257	43,035	27,346	10,199	9,818	3,122	2,716	8,569	3,681
每日实际入住客房数	22,742	19,867	29,738	18,213	7,471	6,788	2,027	1,848	5,803	2,584
平均入住率	68.5%	69.4%	68.8%	65.5%	71.0%	69.0%	64.9%	68.0%	67.3%	70.2%
平均净房价	1,103	596	398	222	943	1,358	806	759	601	738
每间客房日平均收入	756	413	274	145	669	937	523	517	405	518
每间客房总收入	454,625	283,427	198,344	108,290	425,878	561,106	399,925	294,304	315,723	329,064
每间客房总支出	251,729	178,183	144,721	94,452	238,244	293,479	282,305	153,448	197,087	227,064
每间客房固定费用及管理费前收益	208,144	106,614	56,758	16,839	187,634	288,154	117,620	140,856	118,635	101,999
占总收入百分比	45.8%	37.6%	28.6%	15.6%	44.1%	51.4%	29.4%	47.9%	37.6%	31.0%
每间客房所得税及折旧前收益	168,085	85,478	31,805	7,188	134,321	243,187	94,228	110,872	93,776	84,124
占总收入百分比	37.0%	30.2%	16.0%	6.6%	31.5%	43.3%	23.6%	37.7%	29.7%	25.6%

2005

饭店业业务摘要	以平均房价分类 By Average Room Rate				以主要市场分类 By Key Market					
	¥701 以上 Above ¥701	¥501~700 Between ¥501~700	¥301~500 Between ¥301~500	¥300 以下 Below ¥300	北京 Beijing 五星/5Star	上海 Shanghai 五星/5Star	广州 + 深圳 GZ+SZ 五星/5Star	三亚 Sanya 五星/5Star	江苏 + 浙江 JS+ZJ 五星/5Star	天津 + 山东 TJ+SD 五星/5Star
饭店数量	64	82	148	140	19	23	5	5	17	10
每日可供出租客房数	27,551	26,736	40,431	38,601	8,475	10,406	2,587	2,166	5,115	3,409
每日实际入住客房数	20,155	18,636	27,794	28,029	6,017	7,507	1,987	1,465	3,471	2,401
平均入住率	73.2%	69.7%	68.7%	72.6%	71.0%	72.1%	76.8%	67.6%	67.9%	70.4%
平均净房价	1,103	590	390	187	929	1,374	787	874	689	650
每间客房日平均收入	807	412	268	136	659	992	604	591	468	457
每间客房总收入	490,197	263,425	184,222	96,860	434,281	568,946	492,046	333,439	325,657	315,868
每间客房总支出	264,673	167,442	132,520	74,117	244,756	291,387	311,123	156,048	205,556	219,732
每间客房固定费用及管理费前收益	230,857	95,984	51,965	23,208	189,526	293,101	180,924	177,391	120,101	96,137
占总收入百分比	47.1%	36.4%	28.2%	24.0%	43.6%	51.5%	36.8%	53.2%	36.9%	30.4%

备注 Notes:
1. IBFCMF - Income Before Fixed Charges and Management Fees
2. EBITDA - Earnings Before Income Tax, Depreciation and Amortization
3. GZ+SZ - Guangzhou + Shenzhen
4. JS+ZJ - Jiangsu + Zhejiang
5. TJ+SD - Tianjin + Shandong

TABLE 1 INDUSTRY SUMMARY (2006 VS. 2005)

2006

	以星级分类 By Star Rating				以管理模式分类 By Management Model					
	所有五星 All 5 Star	所有四星 All 4 Star	所有三星 All 3 Star	经济型酒店 Budget Hotel	国际管理 Int'l 五星/5Star	国内管理 Dom. 五星/5Star	业主自行管理 Indp. 五星/5Star	国际管理 Int'l 四星/4Star	国内管理 Dom. 四星/4Star	业主自行管理 Indp. 四星/4Star
Industry Summary										
Number of Hotels	172	205	94	250	97	45	30	46	66	93
Number of Available Rooms per Day	61,655	54,444	16,910	18,861	37,028	13,835	10,793	15,517	17,512	21,415
Number of Occupied Rooms per Day	41,487	37,953	11,933	17,743	25,025	9,614	6,869	11,110	12,228	14,663
Occupancy	66.3%	69.4%	69.2%	87.7%	66.9%	66.9%	63.6%	71.4%	68.6%	68.7%
Average Room Rate	792	437	278	152	940	563	584	578	400	361
Revenue Per Available Room - RevPAR	525	303	192	133	629	377	372	413	274	248
Total Revenue Per Available Room	350,468	204,634	125,779	56,928	388,684	280,840	311,473	238,690	201,166	182,791
Total Expenses Per Available Room	208,937	143,216	100,716	33,673	215,769	180,508	222,471	151,411	138,707	140,697
IBFCMF Per Available Room	145,224	63,690	29,984	26,287	177,006	103,259	92,362	87,279	64,817	45,536
% of Total Revenue	41.4%	31.1%	23.8%	46.2%	45.5%	36.8%	29.7%	36.6%	32.2%	24.9%
EBITDA Per Available Room	113,400	42,173	19,239	–	142,713	72,012	68,082	65,577	42,984	24,411
As % of Total Revenue	32.4%	20.6%	15.3%	–	36.7%	25.6%	21.9%	27.5%	21.4%	13.4%

2005

	以星级分类 By Star Rating				以管理模式分类 By Management Model					
	所有五星 All 5 Star	所有四星 All 4 Star	所有三星 All 3 Star	经济型酒店 Budget Hotel	国际管理 Int'l 五星/5Star	国内管理 Dom. 五星/5Star	业主自行管理 Indp. 五星/5Star	国际管理 Int'l 四星/4Star	国内管理 Dom. 四星/4Star	业主自行管理 Indp. 四星/4Star
Industry Summary										
Number of Hotels	142	191	96	43	88	24	30	51	53	89
Number of Available Rooms per Day	53,027	51,315	18,126	6,351	32,817	10,129	10,081	16,341	14,634	21,124
Number of Occupied Rooms per Day	36,165	35,926	12,599	5,821	22,856	7,016	6,311	11,938	10,088	14,287
Occupancy	68.2%	70.0%	69.5%	91.7%	69.6%	69.3%	62.6%	73.1%	68.9%	67.6%
Average Room Rate	806	436	268	180	946	657	482	539	417	359
Revenue Per Available Room - RevPAR	552	305	186	165	659	455	302	394	287	243
Total Revenue Per Available Room	353,541	198,943	120,576	92,576	398,971	341,195	218,050	229,997	192,137	174,697
Total Expenses Per Available Room	205,337	137,042	96,847	43,544	217,336	221,027	124,130	149,369	129,088	129,873
IBFCMF Per Available Room	150,353	62,222	24,920	49,032	185,310	120,168	72,308	80,628	63,050	45,517
% of Total Revenue	42.5%	31.3%	20.7%	53.0%	46.4%	35.2%	33.2%	35.1%	32.8%	26.1%

备注 Notes:

1. 国际管理饭店：由国际饭店管理公司管理或者挂牌的饭店；
2. 国内管理饭店：由国内饭店管理公司管理或者挂牌的饭店；
3. 业主自行管理：未加入任何连锁管理品牌的独立运营饭店、业主自行管理或者自行组织管理团队进行管理的饭店。