

Hotel Brands and the Impact of Brand Differentiation on the Success of the Global Hotel Brands

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Abstract. Year after year, the best hotel chains in the world compete. improving their hospitality and service levels to meet the needs and anticipate the desires of consumers. This paper explores the evolution of world famous hotel brands from their inception as well as role brand differentiation in their success. The absolute leaders in the hotel business are Marriott and Hilton, which are fierce competitors. One of the key components that ensured the success of these two companies is the brand and the work of companies to strengthen it. Although Marriott and Hilton faced many challenges due to the COVID-19 pandemic in 2019, in particular a decrease in the number of customers and financial losses, companies are gradually recovering to the previous level. Both Hilton and Marriott are implementing strategies to expand business in different countries, as well as to integrate new technologies into their work. Due to the findings of the study, it is possible to understand how the world's companies deal with weaknesses and threats in business, as well as what strengths and opportunities make it possible to achieve success in the highly competitive area of the hotel business.

Keywords: Hotel Brand; Hotel Business; Brand Differentiation; Marriott; Hilton.

1. Introduction

There are many different hotel brands around the world which have proliferated over the past twenty years. It is necessary to establish the identity of each brand and its brand standards. A brand defines the identity of every hotel in a brand family and the services that it provides to its guests. Each hotel brand is unique and different so it can meet specific wants and needs from the guests (Dev et al. 149). For hotel companies it is hard to capture a broad range of customers with a single brand. Therefore, a family of brands allows companies to build their reputation (Giroti, par. 3). What is more, every brand should also define a set of standards that every hotel on the brand network must follow. Brand standards are a set of rules or guidelines that are used to help the brand to build its identity that in turn attract consumers in a subset of the market (Adobe Express, paras. 4-5). In addition, all employees should learn about standards during training and follow them so they will be able to provide guests with the promised level of care and amenities (Nicasio, paras. 7-10). Hotel companies create new brands to fill their portfolios' gaps between price and service level. In fact, their goal for making new brands is to attract all different kinds of guests, from Retirees to Millionaires, from single travelers to families (Smith, par. 2). What is more, an equally important aspect is brand positioning. A brand positioning describes the process by which it demonstrates the characteristics of a brand that distinguishes it from its competitors and also describes where or how it occupies a place in the minds of consumers. Hence, the creation of brand identity as well as brand differentiation is a key moment for the hotel business, which ensured the prosperity of the world-famous Hilton and Marriott.

2. Historical Brand Expansion

2.1 Marriott

Throughout history, Marriott has changed from a beer stand to a world known hotel brand. It all began with an A&W root beer stand in Washington D.C. in 1927 (Fig. 1). One year later, Marriott opened two more Hot Shoppes including their first drive-in restaurant and it made its shift into the hotel business in 1957. Over the next 25 years, Marriott grew into a diversified global enterprise led by Bill, son of J. Willard Marriott. In 1969, Marriott opened its first international hotel in Acapulco,

Mexico; then partnered with Sun Line, becoming the first lodging company entering the cruise business in 1972. Marriott became the first lodging company to offer a portfolio of brands in 1987 with the opening of the first Fairfield Inn and Marriott Suites hotels. In 1995, Marriott acquired 49% interest in The Ritz-Carlton Hotel Company and became a historic brand. The first Bulgari Hotel & Resorts opened in Milan, Italy in 2004 following the announcement of the EDITION brand in 2008. It then acquired Starwood Hotels & Resorts in 2016, creating the world's largest hotel company offering more than 1.1 million rooms across 30 brands over 110 countries (Marriott, "2012 & Beyond"). Thus, for Marriott, the path to absolute success in the hotel business began from a beer stand.



Figure 1. Marriott History from "Marriot International Company History Timeline". Zippia, www.zippia.com/marriott-international-careers-7125/history/?src=sp-popout-timed.

2.2 Hilton

Hilton has created multiple new inventions during its history that other brands do not have at the time. Hilton first started with a small hotel that had only forty rooms in Texas (Fig. 2). After years passed, it spread throughout Texas. In fact, Waco Hilton in Texas was the first hotel that had cold running water and air conditioning in shared areas. This was the company's idea and invention to attract consumers. It began a multi-million-dollar program in 1955 to have air conditioning in every of their hotels. Hilton was also the first hotel brand to become international (TSOM Team, "Start with Texas"). In addition, the Roosevelt Hilton in New York City was the first hotel to have television in guest's rooms. Hilton also became the first hotel to have a reservation system and upgraded it in 1955 so guests can reserve through telephone or telegram. Hilton International was born in 1949 when they opened their hotel in Puerto Rico. Then, it began to create multiple sub brands under Hilton that target different consumers. For example, Conrad Hotel was founded with the purpose of operating luxury

hotels in the world's major capitals. Hampton hotels was aiming to provide 100% satisfaction for the guests. In 2009, Hilton then changed its name and logo to Hilton Worldwide and moved to McLean, Virginia. In 2014, the company began opening new hotels in France and China, for which agreements were concluded between one of the subsidiaries of the Hampton by Hilton brand and Plateno Hotels Group. In 2018, Hilton announced the opening of the first underwater hotel suite at the Conrad Maldives Rangali Island ("A Timeline of Hilton History"). In this way, Hilton remains a world-famous brand with a rich history

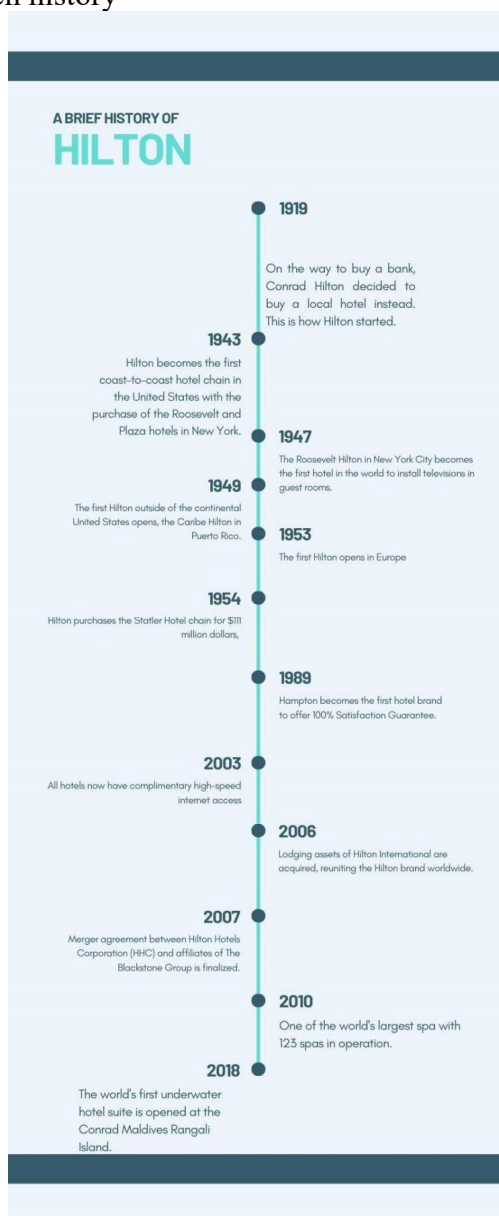


Figure 2. Hilton History from "A Timeline of Hilton History". Loyalty Lobby, May 2019, www.loyaltylobby.com/wp-content/uploads/2019/05/Hilton-History-Timeline.pdf

3. International Expansion

3.1 Purpose of Expansion

Hotel companies expanded from domestic market to international markets for multiple reasons. A hotel joining the right international hotel chain will create more revenue and give the owners access to the global network of resources to help sustain and improve their business. It can also gain resources to enhance the hotel's property, guest experience and surrounding community (Hotel

Business, par. 2). There are several large international hotel brands that operate around the world. For example, Marriott, Hilton, Jin Jiang, InterContinental Hotel Group and Accor Group (Hyland). Marriott and Hilton are based in the United States, while Jin Jiang is based in China, InterContinental Hotel Group is based in the United Kingdom and Accor Group is based in France.

As more and more Chinese tourists travel abroad on holidays and vacations, China's hotel chains are expanding overseas to serve those international travelers. After purchasing a majority stake in Plateno, Shanghai Jin Jiang International Hotels Group had become the fifth largest hotel chain in the world in 2016. In addition, 7Days Inn and GreenTree Inn have already expanded into Austria, the United States, Thailand and Vietnam (Pallister, par. 2). Hence, the main reasons for expanding hotels into the international market are to gain access to global resources, increase revenue, and expand the customer base.

3.2 Expansion of Marriott

As the domestic market of Marriott and Hilton has become mostly saturated in the United States, they expanded into the international market. Marriott began with an A&W root beer stand in Washington D.C and made a shift into the hotel business in 1957. Under the management of J Willard Marriott's son, Bill Marriott. Marriott became a diverse global enterprise in 25 years. The company grew by starting up new businesses and acquisitions. Marriott became an international brand when it acquired an airline catering kitchen in 1966. It opened its first international hotel in Mexico in 1969 ("Marriott International Company History Timeline"). The brand then entered the cruise business in 1972.

The idea of having one main company that created multiple brands was the innovative model started by Marriott in the late 1980s. In 1995, Marriott acquired a 49% interest in The Ritz-Carlton Hotel Company. It acquired Starwood Hotels & Resorts and became the world's largest hotel company with 31 brands in more than 110 countries (Marriott, "2012 & Beyond"). Marriott have been operating in Hong Kong since 1989, since they are still newcomers, they opened their first Marriott brand hotel in China in 1998. However, during the short time they spend on the mainland, they have seen solid and consistent growth in the country. The Ritz-Carlton first aimed to open in the major cities and then slowly expanded into cities that became popular in recent years (Marriott, "Marriott International Announces").

3.3 Expansion of Hilton

In 1949, Hilton became the first international hotel chain with the opening of the Caribe Hilton Hotel in Puerto Rico (TSOM Team, "Start with Texas"). It then expanded through merging and buying other hotel brands. Hilton bought The Statler Hotel for \$111 million dollars gaining to 18 distinguished brands. Hilton opened its first hotel in China in 1988 (USCBC, paras. 5-6). In 2021, Hilton set a goal of opening 1000 hotels in China by 2025 (Hilton, "A Year of Continued Growth in China"). After Marriott and Starwood merged in 2016, hotel companies not only competed on pricing but also on traveler's tastes. With the Starwood merger, the combination of two companies attracts a significant portion of corporate spending in the world's largest urban cities. There will also be changes, not necessarily for the better. There will be changes on booking systems and loyalty programs ("Aspects of Marriott's Merger with Starwood Hotels"). Regular guests from each brand will remain separate for their loyalty points, but can be linked for combined benefits (Fox, "Expanded Loyalty Benefits").

4. Brand Differentiation

Hilton and Marriott have many sub brands under their main company. Today, 119 different brands belong under only seven different hotel families: Wyndham (22), Choice (12), IHG (17), Hyatt (20), Hilton (18) (see Fig. 4) and Marriott newly merged with Starwood now have 30 brands (see Fig. 3).

(Wyndham; Choice; “IHG Hotel Brands”; “Hyatt Hotel Brands”; Hilton, “Our Brands”; Marriot, “We Are Marriott International”)

All categories of brands targeted different types of consumers. People look at different areas when choosing a hotel and the hotel is doing its best job to differentiate their brands. When people think of Luxury Hotels, things will automatically pop into people’s mind, such as new looking bed sheets, soft pillows, in-room dining and fancy bathtubs. However, hotels did this for a reason. They want to take advantage of those already existing brands and stand on top of them. It is extremely important how consumers interact with the human services behind luxury hotels (“Luxury Hotels Keeping up with Fierce Competition”).

Marriott

LUXURY BRANDS <ul style="list-style-type: none"> • The Ritz-Carlton • St. Regis • Bulgari Hotels 	UPPER-UPSCALE <ul style="list-style-type: none"> • Delta Hotel • EDITION • Gaylord Hotels • Le Meridien • Westin Hotels • W Hotels
UPSCALE BRANDS <ul style="list-style-type: none"> • AC Hotel • Courtyard • Four Point by Sheraton • Marriott Hotels • Aloft 	UPPER-MIDSCALE BRANDS <ul style="list-style-type: none"> • Fairfield • Protea • Renaissance • Sheraton
MARRIOTT MIDSCALE BRANDS <ul style="list-style-type: none"> • Element • Moxy • Residence Inn • TownePlace Suites 	

Figure 3. Marriott Brands from Hotel Tech Report; “All of Marriott's Hotel Brands Explained”. Hotel Tech Report, 12Oct. 2022, www.hoteltechreport.com/news/marriott-hotel-brands

Hilton

HILTON LUXURY BRANDS <ul style="list-style-type: none"> • Conrad • Waldorf Astoria • Tempo by Hilton 	HILTON UPPER-UPSCALE <ul style="list-style-type: none"> • DoubleTree • Hilton Garden Inn • Homewood Suites • Signia Hotels
HILTON UPPER-MIDSCALE <ul style="list-style-type: none"> • Hampton 	UPPER-MIDSCALE <ul style="list-style-type: none"> • Tru

Figure 4. Hilton History from Hotel Tech Report; “Hilton's 18 Hotel Brands Explained”. Hotel Tech Report, 12 Oct. 2022, www.hoteltechreport.com/news/hilton-hotel-brands

5. Competition

Hilton and Marriott are the best example to show competition. They are both worldwide hotel brands and they have similar services and innovation. As a result, they often competed for consumers. Not only does competition occur between hotel brand families, but also shows up between brands under the same family. Area of Protection (AOP) is a negotiated geographic area between the hotel manager and the hotel brand family (“Hotel Management Agreements”).

5.1 Strength

The Marriott hotel has several strengths that ensure business success (see Fig. 6). Marriott is the largest hotel chain globally with over 30 brands and it partners with Alibaba to enable customers to book directly without deposits. Marriott has expanded its revenue and profits through the acquisition of highly profitable brands. For example, Ritz Carlton, Bulgari Hotel and Gaylord. It also delivers value by innovation and technology. It is ranked #21 most innovative companies. At the same time, the Hilton also has several strengths (see Fig. 5). Hilton stocks offer a much higher return compared to S&P hotels and resorts. It developed a cleaning program from program and cleanliness across 18 brands to ensure guest safety during the pandemic.

5.2 Weakness

In addition to their strengths, Hilton and Marriott have some weaknesses (see Fig. 5 and Fig. 6 respectively). Marriott had a hard time protecting their data. In 2018, the guest reservation database of Marriott’s Starwood was hacked and around 500 million people’s personal information was exposed. It was sued because Marriott blocked customer’s personal Wi-Fi and was fined \$600,000. Hilton has issues with poor reviews and ratings on platforms. The customer feedback shows that guests did not have a comfortable hotel stay and good experiences. In 2020, 83% of the total revenue was from the U.S market which means that Hilton did not make a lot of money internationally.

5.3 Opportunities

Hilton is a global company that has several opportunities at the moment (see Fig. 5). Among Hilton's opportunities is the partnership with providers for hybrid meetings, which is provoked by the fact that because of the COVID-19 epidemic, people predominantly prefer to meet through technology. According to statistics, the revenue from the Hilton hotel will be 175 million, which means that the hotel has the opportunity to enter new markets, which will reduce the risks of income and allow business expansion. Finally, a significant opportunity for Hilton is the marketing strategy through Instagram. At the same time, the Marriott also has several opportunities (see Fig. 6). For Marriott, an important opportunity is the changing demographic, namely the positioning of the village as a youth brand due to the increase in the number of millionaires and generation Z in the consumer market. In addition, business expansion in developing countries, as well as entrance to related sectors, is one of the key opportunities for Marriott.

5.4 Threats

In addition to their opportunities, Hilton and Marriott have some serious threats (see Fig. 5 and Fig. 6 respectively).

The wave of COVID-19 has created some threats for the Hilton Hotel. Among them, 50% fewer business travelers, which was a significant part of the hotel's income, as well as a negative reaction to mandatory vaccination passports for consumers and labor shortages in the US. An equally important threat to Hilton was the disagreement between Hilton management and the franchise company regarding quality, branding, and technology to provide an effective service. As with Hilton, the global pandemic, which has led to a sharp decline in clientele and a shortage of workers, has become a serious threat to Marriott. Considering the internationality of the guests of the Marriott

Hotel, terrorist attacks are a dangerous threat. Finally, due to trade tensions, huge companies like Marriott have the potential risk of being targeted for tariffs by disgruntled populist governments.

SWOT ANALYSIS FOR HILTON



Figure 5. SWOT Analysis for Hilton from “SWOT Analysis of Hilton: Strengths & Weaknesses 2021”. SWOT Analysis, www.swotanalysistemplate.com/swot-analysis-of-hilton/

SWOT ANALYSIS FOR MARRIOTT



Figure 6. SWOT Analysis for Marriott from “Marriott SWOT Analysis”. Business Strategy Hub, 24 Oct. 2021, www.bstrategyhub.com/marriot-swot-analysis/

5.5 New Ideas

Modern hotels appeal to consumers in different ways, including design of property, customer service and technology. Technology had become extremely important in the era of COVID, when expectations of the customers changed. Some examples of the technologies are: contactless payments, chatbots, mobile check-in and guest app (Fig. 7). The first most popular technology that has not passed by the sphere of the hotel business is chat bots, which allow consumers to receive answers to their questions at any time of the day, and in any language. In turn, this allows hotels to relieve the

workload of staff, while customers can receive answers to their questions more quickly than before. In addition, guest apps give visitors a sense of connectivity and correspondence, as well as allow one to create a 360-degree tour of the room. In addition, guest apps eliminate the need for a physical key, which in turn saves customers from the inconvenience and constant fear of losing the key. Due to the rapid digitalization in the world, mobile check-in is an excellent technology that saves time for both customers and hotels. Mobile check-in simplifies the process and makes it more convenient for customers. Finally, contactless payment increases the speed of payment, reduces the security risks for the health of customers, and is also much more convenient than paying with physical cards. In addition, the contactless payment method provides a higher level of security for customers.

Technologies

<p>CONTACTLESS PAYMENTS</p> <ul style="list-style-type: none"> Improve the speed of transaction Mobile wallets allow customers to pay without having their cards on them Avoid handle cash or use keypads to enter the card PIN 	<p>CHATBOTS</p> <ul style="list-style-type: none"> Ability to provide customers with answers to their questions in 24 hours Can be configured to communicate in different languages
<p>MOBILE CHECK-IN</p> <ul style="list-style-type: none"> Allows Customers to check-in using a mobile app Reducing waiting times Hotels do not have to set times where guests need to check-in 	<p>GUEST APPS</p> <ul style="list-style-type: none"> Guests can enjoy connectivity and correspondence 360-degree tours of a room Do not need a physical room key

Figure 7. Technologies from “Hotel Technology Trends: 16 Upcoming Innovations You Must Know”. REVFINE, www.revfine.com/hotel-technology/

6. Statistics

6.1 Occupancy Rate

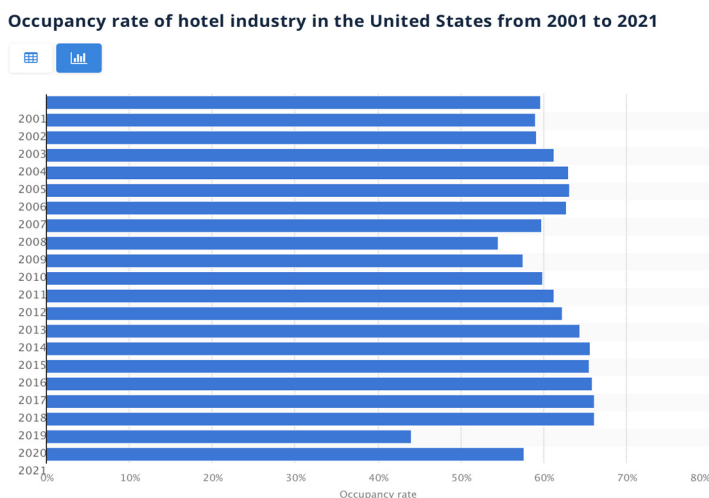


Figure 8. Occupancy Rate from S. Lock; “Occupancy Rate of the Hotel Industry in the United States from 2001 to 2021”. Statista, 13 Oct. 2022, www.statista.com/aboutus/our-research-commitment

According to the Figure 8, over the past 20 years, the occupancy rate has hovered between 65% to 69%. However, there is a significant drop in the year of 2020 due to Covid-19. People are continuing building hotels at this time to balance the rate in market where there is very high level of demand, brand would want to add supply. This is also known as the natural occupancy rate. It is a rate that there will be no new entry into the market being motivated. Once the occupancy rate gets high enough, new entries in the market are motivated as they see that there's an opportunity to make money.

6.2 Revenue of Hilton Worldwide

After Hilton and Marriott expanded into China's market, total revenue slowly began to increase. However, right around 2019 when Covid-19 hit, total revenue dropped steadily because of lock down (see Fig. 9). No one was going on vacation or any business trip at the time. So, this causes the revenue to drop. From 2009 to 2016, the revenue of Hilton Worldwide grew fairly steady from 7.58 billion dollars to 11.66 billion dollars (see Fig. 9). The black bar represented Hilton's revenue during and after their spinoff. According to both the graph and the data, the spinoff in 2017 and Covid both influenced total revenue the most (Fig. 9 and Fig. 10).

Revenue of Hilton Worldwide Holdings from 2009 to 2021

(in billion U.S. dollars)

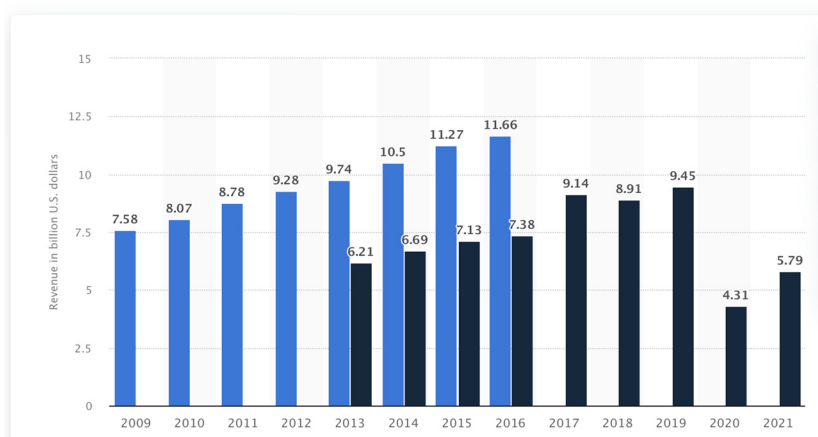


Figure 9. Revenue of Hilton Worldwide from S. Lock; “Revenue of Hilton Worldwide Holdings from 2009 to 2021”. Statista, 21 Apr. 2022, www.statista.com/statistics/297760/revenue-of-hilton-worldwide-holdings-inc/

Year	Annual revenue	
	Revenue	Change
2022 (TTM)	\$3.07 B	30.06%
2021	\$2.36 B	54.88%
2020	\$1.52 B	-58.34%
2019	\$3.66 B	2.66%
2018	\$3.57 B	5.31%
2017	\$3.39 B	-53.03%
2016	\$7.21 B	1.05%
2015	\$7.14 B	4.86%
2014	\$6.81 B	7.6%
2013	\$6.33 B	

Figure 10. Annual Revenue of Hilton Worldwide from S. Lock; “Revenue of Hilton Worldwide Holdings from 2009 to 2021”. Statista, 21 Apr. 2022, www.statista.com/statistics/297760/revenue-of-hilton-worldwide-holdings-inc/

6.3 Revenue of Marriott International

Revenue of Marriott International worldwide from 1999 to 2021

(in billion U.S. dollars)

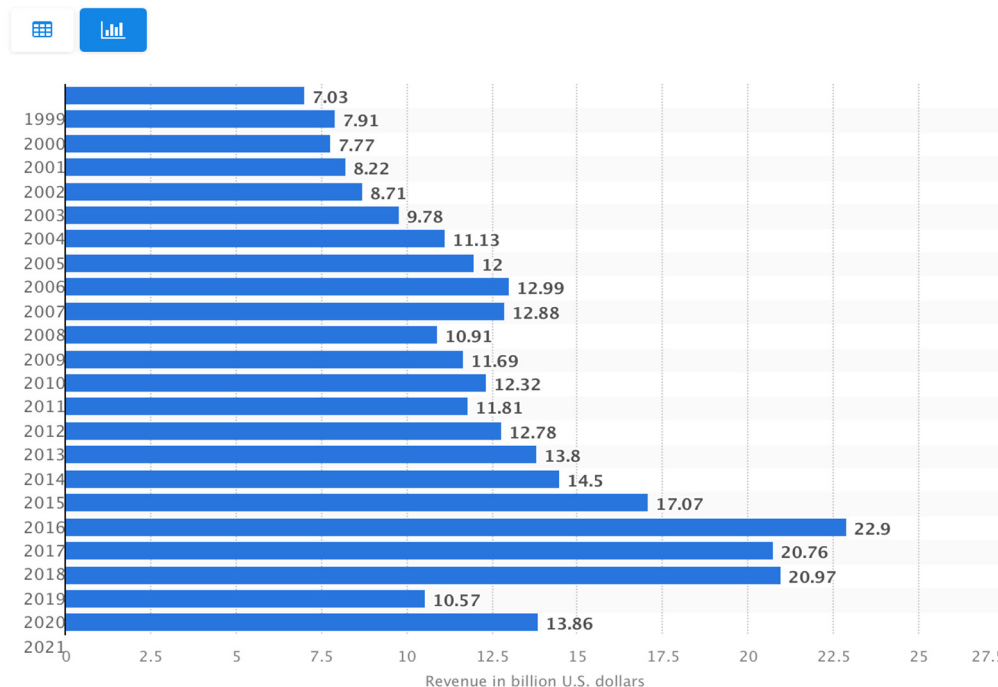


Figure 11. Revenue of Marriott International from S. Lock; “Revenue of Marriott International worldwide from 1999 to 2021”. Statista, 22 Apr. 2022, www.statista.com/statistics/266279/revenue-of-the-marriott-international-inc-hotel-chain/

Annual revenue		
Year	Revenue	Change
2022 (TTM)	\$4.53 B	32.91%
2021	\$3.41 B	61.16%
2020	\$2.11 B	-60.56%
2019	\$5.37 B	3.03%
2018	\$5.21 B	1.68%
2017	\$5.12 B	45.46%
2016	\$3.52 B	23.46%
2015	\$2.85 B	4.2%
2014	\$2.74 B	9.95%
2013	\$2.49 B	
2011	\$12.31 B	5.35%
2010	\$11.69 B	7.18%
2009	\$10.90 B	-15.3%

Figure 12. Annual Marriott Revenue from “Revenue history for Marriott International from 2001 to 2022”. Companies Market Cap, www.companiesmarketcap.com/marriott-international/revenue/

According to Figure 11 and Figure 12 Marriott did not face significant spinoff. However, their revenue dropped in 2009 due to the Jakarta Bombing in Indonesia. The bombers appeared to have

targeted foreigners staying in the JW Marriott and Ritz-Carlton (Rivett-Carnac, “July 17, 2009”). The total revenue dropped in 2020 due to Covid-19.

7. Conclusion

Over the past 20 years, the hotel industry has begun to adapt to new technology and expanded to different places. There’s also a decent number of hotels opening up in different countries of the world and yet, still expanding. Branding has become an integral part of the hotel business, and companies have a strategy to create a brand and strengthen it. Brand differentiation is a strategy which allowed Marriott and Hilton to become world-class companies with a strong and recognizable brand identity. Both companies started small and had several difficulties along the way. At the moment, one can observe serious competition between these two companies. Hilton and Marriott have different strengths and capabilities that build their customer base. In connection with the coronavirus pandemic, companies have faced significant financial losses, and so far have not been able to return to the state before the pandemic. However, companies actively use their own strengths and develop, as well as expand their business. The next expansion plan for Hilton is to launch around 15 additional properties in Caribbean and Latin America by the end of 2022 and to launch Hilton Ushuaia at the southern tip of Argentina in 2023, and Kailani, Curio Collection by Hilton in Cayman Islands’ George Town in 2024 (Nicolls, “Frequent firsts”). On the other hand, Marriott expected an additional of over 20 properties across the Gulf countries over the next 15 months. It continues to see opportunities in the United Arab Emirates to expand more than 70 properties. In addition, Marriott aims for adding 50 properties in Dubai alone (“Marriott International Set to Expand Its Middle East”). However, there will be a point where hotel families cannot keep on expanding as the occupancy rate in the hotel industry will eventually start to get lower.

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