

MARKET SEGMENTATION STRATEGIES IN THE GLOBAL HOTEL INDUSTRY

Silvia Patricia Dodu*

Abstract

The global hospitality industry is undergoing a continuous transformation process driven by major changes in consumer behavior in recent years, the growing need for service personalization, and the massive introduction of digital innovations. Against this background of accelerated change, market segmentation has become a fundamental strategic component for major hotel groups, compelling them to adapt their offerings to increasingly diverse market demands. The segmentation strategy requires identifying distinct customer categories (leisure, transient, and business travelers), as well as the methods through which hotels can truly integrate market-oriented service adaptation into their operations – not only through the consistency of services suited to different client types, but also through price and rate optimization and the streamlining of loyalty programs. By adopting a multi-brand segmentation approach, hotel groups can enhance greater customer satisfaction, maximize profitability, and strengthen their position in an increasingly competitive global market. This article aims to highlight the role of segmentation as a key tool in commercial strategies, by analyzing, on the one hand, the structural models of hotel offerings used by the world's leading international hotel groups, and on the other, the ways in which segmentation responds to the need for competitive differentiation and reinforces market positioning on a global scale. The paper also emphasizes emerging demand trends among contemporary guests – represented by new consumer segments such as Generation Z, “bleisure” travelers, and experience-seeking tourists – that are reshaping hotel segmentation strategies. In conclusion, the article argues that segmentation strategies represent not merely a marketing process, but a comprehensive philosophy of market positioning for hotel groups.

Keywords: hotel groups and chains, market segmentation strategy, commercial strategy, multi-brand, corporate soft brands, consumer segments.

JEL Classification: M31, L83, D12.

1. Introduction

The evolution of the hospitality industry has been largely driven by major hotel corporations operating at a global scale through brand-based expansion strategies and standardized service offerings. Over time, these companies have extended their operations worldwide, with a particular focus on emerging markets, where investments by international hotel groups have contributed to tourism development by channeling travel flows toward new destinations (Dodu, 2021)

In recent years, profound shifts in consumer behavior, together with the rapid advancement of digital technologies, have compelled the hospitality

* Dodu Silvia Patricia is at the Romanian American University. E-mail: silvia.patricia.dodu@rau.ro.

industry to undergo continuous strategic adaptation. Increasingly sophisticated guest expectations regarding experience personalization, combined with intensified competition and demand fragmentation, have reduced the effectiveness of traditional approaches based solely on standardization, accommodation capacity, or formal classification systems. Consequently, hotels are increasingly required to adopt customer-oriented strategies that emphasize experiential value creation and authenticity. Despite the extensive literature on market segmentation and branding in hospitality, existing studies often address these dimensions in isolation, with limited attention to their strategic integration within multi-brand hotel group architectures. In particular, the role of soft brands and corporate soft brands as consumer-oriented segmentation and positioning mechanisms remains underexplored in a unified conceptual framework.

This paper contributes to the hospitality and tourism literature by providing an integrative conceptual analysis of market segmentation strategies in the global hotel industry, with a particular focus on consumer-oriented and experience-driven approaches. Specifically, the study systematizes traditional and contemporary segmentation frameworks, highlights the strategic role of multi-brand architectures, and advances the understanding of soft brands and corporate soft brands as positioning mechanisms in response to changing consumer behaviors and emerging demand trends.

2. Market Segmentation Strategies in the Global Hotel Industry – Theoretical Foundations

Market segmentation represents one of the central pillars of strategic marketing in the hotel industry, particularly in the context of intensified competition among hotel brands and the expansion of the globalization of hotel brands. In the specialized literature, market segmentation is defined as the process of dividing the total market into homogeneous groups of consumers who exhibit similar needs, behaviors, and responses to marketing stimuli (Kotler, Bowen & Makens, 2017). Consequently, segmentation enables the adaptation of tourism products to changes in demand structures and facilitates the targeting of market segments with growth potential, while ensuring efficient resource allocation and competitive market positioning (Ispas & Candrea, 2016).

Unlike the market for tangible goods, hotel services are consumed simultaneously with their production. As a result, the perception of service quality is strongly influenced by the interaction between the guest and the service provider. From this perspective, market segmentation cannot be limited to the mere identification of customer categories, but requires a deeper understanding of how different segments perceive value, satisfaction, and the overall hotel experience. Accordingly, segmentation becomes an essential instrument for tailoring services to the specific expectations of consumers. From a strategic perspective, this evolution suggests that market segmentation in hospitality

increasingly transcends its traditional marketing function, becoming a core element of value creation and competitive positioning.

2.1. Key Types of Segmentation Used in the Hotel Industry

In the hospitality and tourism literature, hotel market segmentation is widely recognized as a fundamental marketing instrument, playing a key role in understanding demand diversity and in adapting hotel offerings to consumer expectations. Traditional segmentation approaches, primarily based on demographic criteria (such as age, income, and education level) or geographic variables, have demonstrated limited effectiveness in explaining actual hotel consumer behavior. Numerous studies indicate that tourists with similar demographic profiles may exhibit different consumption behaviors, while consumers belonging to distinct demographic groups may display convergent expectations and motivations. In this context, recent literature emphasizes the need for a stronger orientation toward segmentation based on behavior, motivations, and experience.

Returning to traditional segmentation typologies applicable to the hotel industry, these approaches should not be excluded from research, as they remain relevant for major market segments. As noted by Feng (2022), “market segmentation is a helpful tool to divide the market into different groups in terms of similar characteristics, attitudes, and needs for products or services.” Demographic and geographic segmentation constituted, for a long period, the foundation of hotel strategies, due to the accessibility and ease of use of the corresponding data. Geographic segmentation is particularly employed by international hotel chains, which adapt their offerings according to source markets and the cultural characteristics of tourists (Bowie, Buttle, Brookes & Mariussen, 2016). Demographic segmentation (income, age) remains relevant, especially for determining price levels and comfort categories, but is increasingly combined with other forms of segmentation. Nevertheless, these criteria provide a limited perspective on consumers’ underlying motivations and do not adequately explain differences in the perception of the hotel experience. As a result, they are currently used more as complementary tools rather than as the primary pillars of segmentation strategies.

Recent literature places growing emphasis on psychographic and behavioral segmentation, which are considered essential for an in-depth understanding of the hotel market. Psychographic segmentation focuses on variables such as lifestyle, values, motivations, and attitudes of tourists, while behavioral segmentation relies on variables directly related to hotel service consumption, including frequency of stays, travel purpose, price sensitivity, booking patterns, and brand loyalty. Research shows that tourists with similar demographic profiles may exhibit different preferences and behaviors, which justifies the need to combine demographic variables with psychographic and behavioral factors to

generate more homogeneous and strategically relevant segments (Soni et al., 2022). Numerous studies conducted in recent years demonstrate that, through detailed analysis of purchasing behavior, hotels can more effectively anticipate customer needs and adapt their offerings to deliver personalized guest experiences. Moreover, both psychographic and behavioral segmentation underpin the development of modern hotel concepts tailored to new generations of consumers, such as lifestyle hotels, where emphasis is placed on design, social interaction, authenticity, and integration into local urban life (Heo & Hyun, 2015).

At the same time, the specialized literature highlights the transition of the hotel industry toward data-oriented segmentation models, supported by advanced analytical technologies. Data-driven segmentation, based on the analysis of large volumes of operational and behavioral data, enables the identification of dynamic segments that can be updated in real time. According to van Leeuwen and Koole (2022), data-driven segmentation allows hotels to anticipate customer needs more effectively, personalize offerings, and optimize marketing and loyalty strategies, thereby strengthening competitive advantage in an environment characterized by intense competition.

3. Consumer-Oriented Segmentation in the Strategies of International Hotel Groups

In the context of an increasingly competitive environment, international hotel companies are progressively adopting consumer-oriented segmentation strategies as a response to the diversification of needs and consumption behaviours. Hoteliers have recognized that, under conditions of intensified international tourism mobility, customer categories can no longer be treated as rigid segments, as hotel consumer behaviour has become increasingly fluid and situational. Recent empirical research demonstrates that benefit-based segmentation enables a more nuanced differentiation of hotel guests based on ethical, experiential, and sustainability-related preferences, particularly in upscale and luxury hospitality contexts (Mele, Dubosson & Schegg, 2024).

3.1. Adapting Hotel Offerings to Consumer Segments

A central element of consumer-oriented segmentation is the adaptation of hotel offerings to the specific characteristics of each identified segment. This adaptation is reflected not only in the structure of the services provided, but also in the architecture of the hotel product, marketing communication, and how the hotel experience is delivered.

Major international hotel groups employ differentiated strategies to respond to the expectations of diverse consumer segments. For example, hotels targeting the business segment emphasize efficiency, digital connectivity, flexibility of workspaces, and loyalty programmes tailored to travel frequency. By contrast,

hotels designed for leisure or experience-oriented segments prioritize elements such as design, sustainability, integration of local culture, wellness services, and personalized experiences.

Service personalization represents a key determinant of customer satisfaction and loyalty, particularly for experience-oriented segments (Kotler, Bowen & Makens, 2017), aiming not only to attract customers but also to build long-term relationships based on relevance and perceived value. Research indicates that consumer loyalty in the hotel industry is increasingly shaped by the quality of the experience delivered and by perceived service quality, rather than by simple affiliation with a brand, these factors being essential to effective customer retention (Górska-Warsewicz & Kulykovets, 2020).

3.2. The Multi-Brand Strategy as a Segmentation Instrument

Hotel brand-based segmentation began to take shape in the 1980s, when hoteliers started to recognize the importance of delivering services tailored to customers' needs and preferences. In the following decades, this orientation evolved toward the development of hotels designed for specific customer categories.

A brand represents more than a name, a logo, a sign displayed on a hotel façade, or the respectable uniform of a concierge employee; rather, it embodies a set of values and promised quality standards. The primary objective of a hotel company's marketing strategy should therefore be to raise awareness among current and potential customers of the brand, particularly in the contemporary context of shifts in demand structures and major innovations in hospitality driven by the rapid development of the hotel industry (Dodu, 2021).

The multi-brand strategy constitutes a complex approach to implementing market segmentation within the global hotel industry, enabling major hotel groups to respond simultaneously to demand diversity and the volatility of consumer behaviour. By developing a diversified brand portfolio, hotel companies can target distinct market segments differentiated according to comfort level, lifestyle, travel motivations, and experiential expectations, without compromising the overall strategic coherence of the group (Kapferer, 2012).

From a strategic perspective, the multi-brand approach makes it possible to overcome the limitations of a single-brand strategy, which cannot effectively address the full spectrum of consumer needs and preferences. Accordingly, each brand within the portfolio is clearly positioned toward a specific target segment, with a distinct value proposition, proprietary operational standards, and a differentiated identity. This differentiation reduces the risk of cannibalization among hotels belonging to the same group and operating within the same geographic area, while also facilitating rapid adaptation to changes in demand. In practice, the multi-brand strategy thus becomes a mechanism through which hotels translate consumer behaviours and motivations into distinct hotel

concepts. Moreover, this approach supports international expansion strategies by enabling brands to adapt to the cultural and economic specificities of different markets, while maintaining access to global distribution systems, loyalty programmes, and managerial know-how.

In this regard, hotel groups such as Marriott International, Accor, and Hilton have developed complex brand portfolios covering a wide range of segments, offering consumers the opportunity to make choices not solely on the basis of brand name or price, but rather according to the type of experience promised: luxury experiences, urban lifestyle concepts, active leisure stays, extended-stay accommodation, or locally authentic experiences. For example, Marriott International employs distinct brands for different consumer segments, each with a clearly defined conceptual proposition tailored to the expectations of its target segment. Each market niche has its own specific characteristics and is addressed through categories such as Luxury, Premium & Lifestyle, Select & Midscale, Longer Stays, and Soft / Boutique / Regional brands, with each level differentiated by the services, facilities, pricing, and quality offered.

3.3. “Soft Brands” and “Corporate Soft Brands” in the Context of Hotel Segmentation Strategies

While, in the initial stages of international expansion, the development of brand portfolios primarily aimed to cover the classical market tiers (economy, midscale, upscale, and luxury), this strategy has gradually evolved toward more flexible forms, adapted to the expectations of consumers oriented toward experience, authenticity, and individualisation. The increasing dynamism of the hotel market and the ongoing focus on identifying “the right hotel for the right customer” have led to the emergence of new hybrid hotel concepts, such as soft brands and corporate soft brands.

“Soft brands” represent a collection of independent hotels that affiliate with a brand platform while retaining their own name and individual brand identity. Soft brands do not constitute an entirely new concept in the market; rather, they represent a contemporary reinterpretation of voluntary hotel consortia through new brand structures adapted to the requirements of high-refinement services and distinctive, unique properties, such as *Small Luxury Hotels of the World*, *Epoque Hotels*, or *Relais & Châteaux* (Dodu, 2021). By contrast, corporate soft brands refer to hotel brands developed by major international chains, which allow the integration of independent hotels into a global portfolio while preserving local identity and operational flexibility (CBRE, 2018). In practice, corporate soft brands function as a strategic bridge between the need for operational standardisation and consumers’ desire for unique, locally authentic experiences. Consequently, corporate soft brands may be interpreted as an advanced segmentation instrument through which hotel groups strengthen their positioning within lifestyle, boutique, and experiential segments, without diluting their global

brand identity. Recent empirical research supports this strategic role of soft-brand affiliations, suggesting that such arrangements may enhance hotel performance while allowing properties to retain distinctive local identities within broader brand portfolios (Chan et al., 2022). Among the established brands within the corporate soft brand category are *Autograph Collection*, *Tribute Portfolio*, and *Design Hotels* (Marriott International), *Curio Collection* and *Tapestry Collection* (Hilton), as well as *Voco* (IHG).

With regard to hotels focused on delivering experiential accommodation, Rauch (CEO of RAR Hospitality) emphasizes, in reference to soft brands, that “It’s one where the customer does not know the name of that brand; they only know the name of the hotel,” highlighting the importance of the individual property’s identity in the consumer decision-making process (Hotels Management, 2019). As illustrated in Figure 1, the distinction between soft brands and corporate soft brands reflects two complementary approaches to market segmentation in the hotel industry. While traditional soft brands emphasize the preservation of independent hotel identity and symbolic prestige, corporate soft brands integrate locally distinctive properties within global hotel group platforms, combining experiential uniqueness with standardized operational support.



Figure 1. Soft brands and corporate soft brands as strategic segmentation models in the hotel industry. Source: adapted from Hotel Revenue Insights (2019).

In conclusion, strategies based on soft brands and corporate soft brands reflect two distinct models of consumer-oriented segmentation. While traditional soft brands rely on exclusivity, authenticity, and symbolic prestige, corporate soft brands seek to integrate local experiences within a global operational framework, offering consumers a balance between uniqueness and security. From the perspective of major hotel groups, these brands represent essential instruments for addressing experiential and lifestyle segments without diluting the identity of

core brands. This evolution confirms that the multi-brand strategy no longer aims solely at diversifying the offer, but is increasingly transformed into a strategic mechanism for adapting to emerging demand trends and to the dynamics of the contemporary hotel market.

4. Emerging Trends in Hotel Demand Segmentation

Recent literature on hotel demand segmentation highlights a clear shift from traditional, predominantly demographic criteria toward approaches centred on consumer generations, purchasing behaviours, and experiential motivations. This transformation is closely linked to profound changes in contemporary tourist behaviour, influenced by digitalisation, increased mobility, and the redefinition of the relationship between work, leisure, and experience (Górska-Warsewicz & Kulykovets, 2020).

From the perspective of the hotel industry, the analysis of tourist behaviour across generations no longer focuses exclusively on estimating demand volumes, but directly influences hotel product design, service personalisation, brand positioning, and distribution strategies. In this context, studies dedicated to the Millennial and Generation Z cohorts provide relevant insights not only for understanding current consumption attitudes, but also for shaping the strategic directions of hotel groups and the future configuration of the global hospitality sector.

Research on generational segmentation identifies significant differences between Generation Z, Millennials, and earlier generations regarding information sources, accommodation selection criteria, and attitudes toward brands. Generation Z demonstrates strong preferences for authentic experiences, authentic digital content (UGC) (European Travel Commission, 2020), peer-to-peer reviews, and social media recommendations, to the detriment of traditional information channels. This reality is reshaping the ways in which hotels must communicate and position themselves in the near future.

Another factor driving the reorientation of hotel products concerns the redefinition of consumer loyalty within the hospitality industry. As noted by Górska-Warsewicz and Kulykovets (2020), “loyalty in the hotel industry is increasingly linked to the perceived quality of the experience delivered rather than to simple brand affiliation.” Consequently, a growing body of evidence suggests that customer loyalty in hospitality is shifting toward experience-based loyalty. For Millennial and Generation Z consumers, loyalty is no longer determined exclusively by membership in loyalty programmes or by recognition of a global brand, but rather by the quality of interactions, the relevance of the experience offered, and the hotel’s ability to respond in a personalised manner to individual expectations (Górska-Warsewicz & Kulykovets, 2020). In this context, loyalty becomes a dynamic process, built through memorable and authentic experiences, and requires hotel groups to strategically orient

themselves toward concepts such as lifestyle, design, green hotels, soft brands, and corporate soft brands. These concepts allow for the cultivation of more personal relationships with guests without the constraints of rigid standardisation, thereby redefining the foundations of loyalty in the hospitality of the future.

Recent observations of Generation Z travel behaviour indicate significant changes in the decision-making process compared to previous generations, including Millennials, despite similarities related to technology use and interest in cultural experiences. Popşa (2024) shows that, unlike Millennials, for whom brand value and reputation remain important selection criteria, Generation Z places greater emphasis on authenticity, social and environmental responsibility, and brands' ability to interact coherently with tourists across both digital and offline environments. Recent empirical research further supports the relevance of value- and attitude-based segmentation approaches in hospitality. Attitudinal segmentation reveals distinct traveler segments based on sustainability orientation, which significantly influences hotel value perceptions and the effectiveness of segmentation strategies, particularly in upscale and luxury hotel contexts (Loedphacharakamon & Choibamroong, 2025). In this context, purchase decisions are strongly influenced by the use of travel applications and social media throughout the entire travel journey, from planning and booking to experience documentation. The preference for unique and non-repetitive experiences compels hoteliers to adapt their segmentation and positioning strategies toward experiential and value-oriented concepts. This observation explains why new hotel concepts increasingly seek to translate declared values related to sustainability and social responsibility into tangible signals – such as certifications, visible operational practices, or local offerings – that can be easily communicated and verified by consumers (Minazzi, 2025).

The bleisure phenomenon, defined as the fusion of business and leisure travel, has emerged as a significant driver of demand in recent years, requiring hoteliers to adapt their service offerings to hybrid concepts (in-room workspaces, multifunctional lobbies, and flexible service packages). An increasing number of business travellers now incorporate leisure components into their travel arrangements, with growth trends reported by numerous companies in 2025. According to statements from Marriott International, the average length of stay for business travel is approximately 20% longer compared to 2019, while American Airlines identifies bleisure as the fastest-growing segment within its passenger portfolio (Navan, 2026). Furthermore, according to estimates by Allied Market Research, the global bleisure travel market was valued at approximately USD 315.3 billion in 2022 and is projected to reach USD 731.4 billion by 2032, with a compound annual growth rate (CAGR) of 8.9%, confirming the role of this phenomenon as a structural factor in the transformation of tourism and hotel demand.

These dynamics have fuelled the development of modern hotel concepts – such as lifestyle and boutique hotels, as well as soft-brand and corporate soft brand structures – as strategic responses to changing purchasing behaviours. Corporate soft brands enable major hotel groups to integrate independent properties with strong local identities into their portfolios while simultaneously offering global distribution and access to loyalty programmes, without imposing rigid standardisation. Complementarily, independent hotels increasingly join voluntary chains or boutique collections to enhance digital visibility and address consumers seeking authentic experiences (CBRE, 2018).

According to the American Express Global Travel Trends Report 2025, travel decision-making among Millennials and Generation Z is increasingly less focused exclusively on destination choice and more on the overall travel experience, with 70% of respondents stating that the enjoyment of the journey is as important as the destination itself. This evolution confirms the relevance of segmentation based on motivations, values, and lifestyles, to the detriment of traditional socio-demographic criteria. The report also highlights pronounced differentiation in demand based on consumers' relationship with technology, with over 80% of Millennials and Generation Z using digital applications and social platforms in travel planning and booking processes, and a similar proportion valuing the usefulness of artificial intelligence solutions for experience personalisation. In parallel, the orientation toward experiences with personal and emotional significance is reflected in a growing interest in authenticity, with over 80% of respondents seeking experiences that enable the construction of a personal narrative, and more than half stating that they choose destinations for access to local specificity. These findings support the view that hotel demand segmentation has become a strategic positioning instrument through which hotels can develop differentiated offerings anchored in local identity and experiential promises (American Express, 2025).

Accordingly, leading consultancy reports emphasise that experience – defined as the sum of relevant interactions, digital habits, and local engagement – is becoming the primary driver of loyalty, in some contexts more influential than affiliation with a traditional brand. This reinforces the rationale for multi-brand strategies and for the use of soft brands as consumer-oriented segmentation instruments (McKinsey).

Recent developments in the hospitality industry indicate that market segmentation can no longer be approached exclusively as an operational marketing tool, but must instead be understood as a philosophy of strategic positioning that fundamentally structures hotel offerings. In the current environment, characterised by demand fragmentation and intensified competition, hotels that treat segmentation as an integrated process – influencing product design, experience delivery, and brand communication – are more likely

to build clearer and more relevant market positions (Kotler, Bowen & Makens, 2017; Dolnicar, 2018).

Conclusion

Market segmentation represents a central pillar of competitive strategies in the global hotel industry, particularly in the context of profound transformations in consumer behavior and intensified international competition. The shift from traditional segmentation criteria—predominantly demographic and geographic—toward approaches focused on behaviors, motivations, and experiences reflects the need for a more nuanced understanding of demand and of how value is perceived and constructed within the hospitality industry. From this perspective, segmentation is no longer a descriptive exercise, but rather a strategic instrument that directly influences the structure of hotel offerings, brand positioning, and the relationship with consumers.

Looking ahead, the growing importance of multi-brand strategies and the development of innovative hotel concepts adapted to demand fragmentation and consumers' increasing orientation toward personalized, authentic, and value-relevant experiences becomes evident. Major hotel groups employ these instruments to address distinct market segments, reduce the risks associated with rigid standardization, and integrate local identity within a global operational framework. In this sense, the multi-brand strategy functions as a mechanism through which consumer behaviors and expectations are translated into differentiated hotel concepts capable of supporting international expansion and long-term economic performance.

At the same time, the emerging trends analyzed—particularly those associated with Millennials and Generation Z—indicate a redefinition of the concept of loyalty in the hospitality industry, shifting from brand attachment toward experience-based loyalty. The integration of digital, experiential, and value-related dimensions into segmentation strategies confirms that segmentation must be approached as a positioning philosophy rather than merely as an operational marketing tool. In this context, hotels' ability to design coherent, personalized, and meaningful experiences becomes essential for maintaining relevance and for creating sustainable value within a dynamic competitive environment.

Accordingly, market segmentation increasingly emerges as a philosophy of strategic positioning in the contemporary hospitality industry, influencing both the multi-brand strategies of major hotel groups and the capacity of individual hotels to remain relevant in a highly competitive and dynamic environment. Within this logic, segmentation becomes a continuous strategic process oriented toward adaptation, differentiation, and the creation of sustainable value for both consumers and organizations.

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