

Macau's Luxury Hotel Industry in the Context of the Greater Bay Area: Strategic Reflections on Mainland Chinese Hotel Brands

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Abstract: As Macau's hospitality industry shifts towards diversification, mainland Chinese hotel brands face both opportunities and challenges in this competitive market. Traditionally dominated by gaming-driven luxury hotels, Macau is witnessing a rise in non-gaming luxury, driven by policy shifts and evolving consumer preferences. Using Morpheus Hotel as a case study, this research explores anti-luxury theory as a strategic approach, emphasizing invisible luxury—where cultural storytelling, wellness experiences, and technology-driven personalization redefine luxury beyond material opulence. This study proposes four key strategies for mainland brands entering Macau: (1) repositioning through experiential and cultural luxury, (2) leveraging technology for personalized engagement, (3) integrating wellness tourism with hospitality, and (4) adopting asset-light expansion to reduce financial risks. These findings provide new insights into luxury hospitality and market differentiation, offering practical strategies for sustainable growth. The success of anti-luxury strategies in Macau signals a broader industry shift towards intangible, immersive, and wellness-focused luxury experiences.

Keywords: Luxury hospitality, anti-luxury theory, Macau hotel industry, invisible luxury, wellness tourism, technological innovation, experiential travel.

1. Introduction

As a globally renowned tourism and gaming hub, Macau's luxury hotel industry has experienced rapid development over the past decades, closely tied to the prosperity of the gaming sector. Iconic luxury hotels such as The Venetian, Wynn, and Galaxy have successfully established Macau's distinctive luxury hospitality landscape by integrating opulent décor, high-end shopping malls, fine dining, and gaming operations (Shukla & Purani, 2012). These hotels not only attract global visitors with their lavish facilities but also create a comprehensive industry chain centered around gaming and supported by luxury services through diversified entertainment experiences. However, with the advancement of Macau's economic diversification policies, particularly under the Greater Bay Area (GBA) development strategy, the city's hospitality industry is gradually evolving toward a more diversified and differentiated structure (Song et al., 2022). The government has been actively promoting non-gaming elements, encouraging hotels to innovate in areas such as culture, arts, and conventions to adapt to shifts in the global economic landscape and the changing preferences of visitors.

Meanwhile, China's domestic hotel industry has also witnessed rapid growth, transitioning from an initial reliance on international brands to the strong emergence of local brands. Leading domestic hotel groups such as Jin Jiang, Huazhu, and Atour have not only solidified their positions in the domestic market but are also actively exploring new paths for international expansion. In particular, Chinese hotel brands have demonstrated significant innovation capabilities in technology-driven operations and smart management. The widespread adoption of big data analytics, smart rooms, and automated check-in services has enabled domestic hotels to export high-quality service and management models abroad (Neuhofer, Buhalis, & Ladkin, 2015). These technological

advancements not only enhance operational efficiency but also provide guests with highly personalized and seamless experiences, becoming a core competitive advantage for Chinese hotel brands in international markets.

As the demand for internationalization among Chinese hotel brands continues to grow, Macau has emerged as a critical entry point for their global expansion, serving as a bridge between the Chinese mainland and international markets. However, the highly saturated hospitality market in Macau, the profound impact of the gaming industry on hotel profitability, and the entrenched market dominance of traditional luxury hotels present considerable challenges for mainland Chinese hotel brands seeking entry. Against this backdrop, this study aims to explore how Chinese hotel brands can establish a differentiated positioning in Macau to navigate these complex market dynamics.

Using Morpheus Hotel as a case study, this paper argues that luxury hospitality does not necessarily have to rely on the traditional model of extravagant opulence. Instead, modern artistic design can shape a distinctive luxury experience, leading to the conceptual development of anti-luxury or invisible luxury (Tynan, McKechnie, & Chhuon, 2010). Morpheus Hotel, with its minimalist yet sophisticated design, redefines the essence of luxury hospitality, appealing to high-end consumers seeking unique experiences. Furthermore, by leveraging the competitive advantages of mainland Chinese hotel brands in technological innovation and the wellness industry (Smith & Puczkó, 2014), this study proposes strategic reflections on their entry and development in the Macau market. The goal is to offer new perspectives and insights for Chinese hotel brands to achieve sustainable growth in this highly dynamic and competitive environment. By focusing on differentiated positioning, technological innovation, and cultural integration, mainland Chinese hotel brands can carve out new pathways in Macau's hospitality

market and maximize their brand value.

2. Literature Review

2.1. Theoretical Framework

This study adopts the anti-luxury theory as its core theoretical framework to explore the strategic positioning and development pathways of mainland Chinese hotel brands in the Macau market. As a significant theoretical branch within postmodern consumer culture, anti-luxury theory posits that luxury experiences are no longer confined to traditional material ostentation and explicit symbols but are instead shifting towards personalized experiences, spiritual fulfillment, and deep cultural engagement (Tynan, McKechnie, & Chhuon, 2010). This theoretical paradigm aligns closely with modern consumers' growing inclination toward minimalism, invisible luxury, and cultural resonance, particularly among high-end clientele who have developed aesthetic fatigue toward conventional luxury models (Yeoman & McMahan-Beattie, 2011).

Morpheus Hotel serves as a quintessential case study in anti-luxury hospitality, as its innovative modern artistic design and minimalist aesthetics perfectly embody the core principles of this theory. By challenging the traditional paradigm of luxury hotels, which has long been dominated by material extravagance, Morpheus Hotel instead integrates design aesthetics with intrinsic spiritual value, crafting a uniquely immersive experience for its guests. This operational model, guided by the principles of anti-luxury, not only redefines the essence of luxury but also provides critical strategic insights for mainland Chinese hotel brands seeking differentiated competitive advantages in the Macau market.

2.2. The Definition and Evolution of Luxury Hotels: A Cultural and Design Reconsideration

With the acceleration of globalization and the evolving socio-cultural landscape, the concept and scope of luxury have undergone profound transformations. Yeoman and McMahan-Beattie (2006) argue that modern luxury is no longer solely defined by the blind pursuit of expensive goods or the mere accumulation of material wealth. Instead, it increasingly emphasizes personalized satisfaction, emotional resonance, and spiritual enrichment within product and service experiences. This individualized experience is often deeply intertwined with cultural depth, as the incorporation and presentation of unique cultural elements endow luxury products and services with greater meaning and value.

The design philosophy of Morpheus Hotel in Macau exemplifies this shift. Instead of adhering to the traditional luxury hotel aesthetic characterized by opulent décor and excessive ornamentation, Morpheus adopts a highly artistic and futuristic spatial design, creating an environment that is both visually striking and culturally profound. Through meticulous curation of art pieces and an uncompromising attention to detail, Morpheus successfully de-emphasizes the ostentatious aspects of traditional luxury, redirecting the focus toward cultural and aesthetic value. By doing so, it crafts a highly immersive artistic experience for its guests (Tynan et al., 2010).

Given Macau's unique positioning as a cross-cultural nexus, Shukla and Purani (2012) further highlight the complexity of luxury consumption patterns in the region. They argue that consumer purchasing decisions and perceptions of luxury are

significantly shaped by local cultural traditions, societal values, and individual identity construction. This suggests that a differentiated market approach—one that tailors product design and marketing strategies to diverse cultural backgrounds—is crucial in meeting the personalized luxury demands of various consumer segments.

For mainland Chinese hotel brands seeking to expand into the Macau market, it is imperative to understand and respect local culture, as well as to profoundly explore Macau's unique cultural elements and seamlessly integrate them into hotel design, services, and marketing strategies. This approach will be key to establishing a distinctive luxury positioning and enhancing brand competitiveness. Furthermore, given Macau's role as a meeting point of Chinese and Western cultures, mainland hotels could also explore blending traditional Chinese cultural aesthetics with contemporary Western design concepts, thereby creating a uniquely differentiated luxury experience that appeals to a broader consumer base.

2.3. Technology-Driven Personalization: Redefining the Boundaries of Luxury Hospitality

With growing global health consciousness, the intersection of luxury and wellness has emerged as a major trend. Smith and Puczkó (2014) argue that modern luxury extends beyond material enjoyment to encompass holistic well-being, reflecting consumers' pursuit of higher-quality lifestyles. This shift is evident in the increasing demand for wellness-centered luxury experiences, including spa retreats, personalized health programs, and nutrition-focused hospitality services. Given Macau's policy initiatives to develop the health and wellness industry, mainland hotel brands have a strategic opportunity to integrate health-oriented luxury experiences, distinguishing themselves from gaming-focused hotels. By offering high-end wellness services, including AI-driven medical diagnostics, traditional Chinese medicine-inspired culinary experiences, and personalized fitness regimens, mainland hotels can cater to discerning travelers seeking holistic luxury.

2.4. The Integration of the Wellness Industry and Luxury Hospitality: Expanding Luxury to Holistic Well-being

With the growing global emphasis on health and wellness, an increasing number of consumers are prioritizing comprehensive physical and mental well-being, leading to the emergence of health-conscious luxury as a new consumption trend. Numerous scholars have explored this phenomenon. Smith and Puczkó argue that modern luxury is no longer confined to traditional material indulgence; rather, it extends to holistic well-being, encompassing both psychological and physical health, reflecting a heightened pursuit of overall quality of life. This shift is evident not only in consumer purchasing preferences but also in the transformation of lifestyle choices and consumption experiences.

Similarly, Dubois et al. (2005) emphasize that luxury consumption has evolved from a mere display of wealth to a focus on intrinsic self-fulfillment. More consumers now opt for products and services that enhance their quality of life rather than solely serving as symbols of social status.

Against the backdrop of the Macau government's proactive promotion of the wellness industry, mainland Chinese hotel

brands are presented with both significant opportunities and challenges. By leveraging their strengths in health management, wellness concepts, and sustainable development, mainland hotel brands can explore an innovative integration of wellness elements into luxury hospitality. This strategic shift has the potential to disrupt conventional business models by offering high-quality services that promote both physical and mental well-being, thereby differentiating themselves from gaming-centric hotel operations in Macau's saturated hospitality market.

Such a transformation not only provides guests with novel and meaningful luxury experiences but also contributes to the wider promotion and adoption of health-conscious lifestyles. In doing so, it drives the overall transformation and upgrading of the mainland Chinese hotel industry, positioning it more competitively in the global luxury tourism market. Furthermore, by aligning with Macau's economic diversification strategy, this integration of wellness and luxury injects new vitality and momentum into the region's socioeconomic development, fostering long-term growth and sustainability.

3. Case Study: The Anti-Luxury Approach of Morpheus Hotel

3.1. Background and Market Positioning of Morpheus Hotel

Morpheus Hotel is one of Macau's most representative modern luxury hotels, designed by the renowned architect Zaha Hadid. Its distinctive structure and minimalist aesthetic set it apart in a market dominated by traditionally opulent, gilded luxury hotels (Tynan et al., 2010). Departing from the typical design and layout of gaming hotels, Morpheus integrates modern art with architectural aesthetics, emphasizing spatial fluidity, technological sophistication, and personalized experiences. This approach caters to the evolving preferences of high-end travelers, who seek a unique and refined luxury experience beyond conventional extravagance (Shukla & Purani, 2012).

3.2. Replicability of the Morpheus Hotel Model

While the success of Morpheus Hotel demonstrates the feasibility of anti-luxury strategies, whether this model can be directly replicated by mainland Chinese hotel brands remains a subject of debate. The hotel's success is attributed to several key factors:

1. **Strong Brand and Financial Backing** – Morpheus operates under the MGM Group, benefiting from robust financial resources and brand influence.

2. **Iconic Architectural Differentiation** – The signature design by Zaha Hadid provides Morpheus with a highly distinctive market positioning.

3. **Targeting High-End, Non-Gaming Travelers** – Unlike traditional gaming-focused hotels, Morpheus primarily appeals to a sophisticated clientele seeking luxury experiences beyond casino entertainment.

These factors have enabled Morpheus to establish itself successfully within Macau's competitive hospitality landscape.

By contrast, mainland Chinese hotel brands seeking to enter the Macau market and replicate the Morpheus model face several significant challenges:

1. **Lower Brand Recognition** – Mainland hotel brands generally lack the global reputation to compete directly with established international luxury brands (Shukla & Purani, 2012).

2. **High Property Costs** – Macau's skyrocketing commercial real estate prices pose financial barriers to direct investments in high-end luxury hotels (Buhalis & Amaranggana, 2015).

3. **Market Preference for International Service Standards** – Macau's hospitality sector is heavily influenced by international service expectations, requiring mainland brands to adapt their operational models and service standards to meet the preferences of both local and international guests (Tynan et al., 2010).

Therefore, when adopting an anti-luxury strategy in Macau, mainland hotel brands should not blindly replicate the Morpheus model but should instead adapt it based on their unique strengths. Potential strategic adjustments may include:

1. **Leveraging Asset-Light Business Models** – Utilizing brand management or franchise-based expansion to mitigate investment risks.

2. **Maximizing Technological Advantages** – Incorporating smart hospitality innovations to enhance operational efficiency and guest experiences.

3. **Gradually Enhancing Brand Influence in International Markets** – Establishing a progressive presence in the global luxury hospitality industry through differentiated branding and strategic partnerships.

By tailoring the anti-luxury approach to their own capabilities, mainland hotel brands can carve out a sustainable and competitive position in Macau's dynamic hospitality market.

4. Macau Market Analysis and Challenges for Mainland Chinese Brands

4.1. Competitive Landscape of Macau's Hotel Market

Macau's hotel industry has long been dominated by gaming-centric hotels, with the gaming industry serving as the primary economic driver and deeply influencing the business models of luxury hotels. Casino operators typically attract high-end clientele through aggressive rebate and incentive mechanisms (Buhalis & Amaranggana, 2015). However, with the Macau government's push for moderate economic diversification, non-gaming hotels are gaining policy support and showing steady growth, signaling a gradual shift from a gaming-driven luxury hotel model to a more diversified market structure.

4.2. Challenges for Mainland Chinese Hotel Brands Entering Macau

(1) Low Brand Recognition

Macau's high-end hotel market has been dominated by international luxury brands for decades, with globally renowned names such as The Ritz-Carlton, Four Seasons, and Rosewood firmly established in the market. In contrast, mainland Chinese hotel brands have relatively low brand recognition in Macau, making direct competition against these well-established global players a significant challenge (Shukla & Purani, 2012).

(2) Cultural Differences in the Market

Macau's hotel market is heavily influenced by international tourism, with consumers showing a strong preference for globally recognized hotel brands. As a result, when entering the Macau market, mainland hotel brands must adapt to local consumer preferences and implement localized strategies to enhance market acceptance (Tynan et al., 2010).

(3) High Operating Costs

Macau's commercial real estate prices are among the highest in the region, making hotel development significantly more expensive than in mainland China. Additionally, labor costs, management expenses, and supply chain costs in Macau's hospitality industry far exceed those in mainland China. To remain competitive, mainland hotel brands need to establish highly efficient operational models to control costs while maintaining service quality and profitability (Smith & Puczkó, 2014).

(4) Market Acceptance Among Target Customer Segments

Macau's high-end customer base consists primarily of gaming tourists, international visitors, and local residents. Gaming-centric hotels continue to dominate the market, while non-gaming luxury hotels are still in the process of gaining wider market acceptance. Therefore, a critical challenge for mainland Chinese hotel brands is how to effectively attract high-end clientele in Macau, particularly those seeking alternative luxury experiences beyond gaming-oriented hospitality.

5. In-Depth Analysis of Market Development Trends

As Macau's hospitality market undergoes transformation, consumer expectations and demands for hotels are evolving, leading to the rise of non-gaming luxury hotels. The combination of government policy guidance and shifting consumer preferences is driving a structural shift from gaming-driven luxury to non-gaming luxury hospitality. This trend not only presents new growth opportunities but also creates favorable conditions for mainland Chinese hotel brands seeking entry into the Macau market.

(1) Evolving Preferences of High-End Consumers

Traditional luxury hotels have relied on opulent décor, premium brand partnerships, and integrated gaming facilities to attract customers. However, today's high-end consumers are increasingly drawn to experiential luxury, prioritizing cultural immersion, personalized services, and wellness-oriented experiences (Tynan et al., 2010). As a result, Macau's hospitality market is shifting toward spiritual luxury and wellness luxury, focusing on meaningful, holistic experiences (Smith & Puczkó, 2014).

(2) Growing Potential of Non-Gaming Customer Segments

With tightening regulations on the gaming industry, the Macau government is actively promoting economic diversification, fostering the growth of non-gaming sectors (Song et al., 2022). This shift has directly contributed to an expanding non-gaming clientele, including high-end business travelers, cultural tourists, and family vacationers, who prefer luxury hotels offering unique design, high-quality services, and wellness experiences. Consequently, the non-gaming luxury hotel segment is emerging as a lucrative market opportunity (Buhalis & Amaranggana, 2015).

(3) Market Potential of the Younger Generation

Millennials and Generation Z consumers are becoming the

new driving force in the luxury hotel market. Unlike previous generations, they place greater emphasis on personalization, customization, and sustainability in their luxury experiences (Yeoman & McMahon-Beattie, 2011). Therefore, mainland Chinese hotel brands can leverage smart technology, cultural luxury, and wellness luxury as differentiation strategies to attract young high-end consumers.

(4) Technology Empowerment and the Rise of Sustainable Luxury

The future of Macau's luxury hotel sector will be increasingly shaped by the integration of artificial intelligence (AI), big data analytics, personalized recommendation systems, and smart management platforms to enhance guest experiences (Neuhofer et al., 2015). Simultaneously, sustainable luxury concepts are gaining momentum, with eco-friendly architectural design, energy-efficient solutions, and green supply chain management becoming key competitive factors in the high-end hospitality sector (Smith & Puczkó, 2014).

The success of Morpheus Hotel demonstrates that luxury hospitality can establish a competitive edge in the non-gaming sector through modern artistic design and customized service offerings. Moving forward, mainland Chinese hotel brands that develop distinctive competitive advantages in technological innovation, wellness luxury, and sustainable development will be better positioned to gain recognition and successfully penetrate the Macau market.

6. Conclusion

6.1. Strategic Recommendations: Multidimensional Integration and Value Reconstruction

The unique characteristics of Macau's hotel market require mainland Chinese brands to adopt a three-pronged strategic approach when entering the market: differentiated competition, localized innovation, and technology-driven empowerment. Drawing insights from anti-luxury theory and the success of Morpheus Hotel, this study proposes the following strategic framework:

(1) Repositioning Through "Invisible Luxury"

Mainland hotel brands should move beyond traditional luxury's material symbolism and instead focus on "spiritual experiences" and "cultural storytelling." For instance, hotels can incorporate curated local art exhibitions, immersive heritage experiences, or interactive theatrical settings to transform Macau's Sino-Portuguese cultural elements into emotional value embedded in hotel spaces (Dinnie, 2015).

A relevant example is Atour Hotel's collaboration with Wu Xiaobo Channel to create photography-themed rooms, which mainland brands could adapt by showcasing documentary-style street photography from local Macau artists to cultivate a humanistic, "invisible luxury" experience (Yoelao, 2024). This strategy enables brands to avoid direct competition with established international luxury brands while catering to the growing demand among young high-net-worth individuals (HNWIs) for "luxury with a story" (Yeoman & McMahon-Beattie, 2011).

(2) Technology as an Experiential Upgrade

Mainland Chinese hotel brands can leverage their technological edge to move beyond backend operational efficiency and create front-end guest experiences through:

Dynamic Pricing and Demand Forecasting – Utilizing

machine learning algorithms to analyze fluctuations in Macau's MICE (Meetings, Incentives, Conferences, and Exhibitions) and festival-related tourist inflows, enabling real-time adjustments to pricing and service offerings (Buhalis & Amarangana, 2015).

Contactless Health Management – Embedding smart sleep monitoring systems in guest rooms and integrating biometric health assessment tools to offer personalized wellness programs (Henderson, 2003).

Metaverse Interaction – Developing VR-enabled historical tours of Macau's UNESCO heritage sites, allowing guests to engage in immersive cultural explorations from within the hotel, thereby differentiating the experience from gaming-centric luxury hotels (Guttentag, 2010).

(3) Vertical Integration with the Health and Wellness Industry

Given the Macau government's incentives for Traditional Chinese Medicine (TCM) and wellness industries, mainland hotel brands can create a “wellness + luxury” ecosystem by:

Front-End Customer Acquisition – Partnering with cross-border medical centers in Zhuhai Hengqin to offer integrated medical aesthetics, wellness retreats, and luxury hotel packages, targeting affluent families from the Greater Bay Area (GBA) (Smith & Puczkó, 2014).

Midstream Guest Experience – Incorporating AI-driven TCM diagnostic robots in hotel lobbies and collaborating with chefs to curate personalized medicinal cuisine menus, thereby creating a “sensory-driven wellness luxury” experience (Yoelao, 2024).

Back-End Revenue Expansion – Developing proprietary wellness brands, such as a hotel-branded TCM spa product line, following models like Huazhu Group's Xi Yue wellness brand, to enable secondary revenue streams through private-domain traffic monetization (Chan et al., 2020).

(4) Asset-Light Expansion Models for Macau

To mitigate investment risks, mainland hotel brands could adopt a hybrid model of management contracts and franchise licensing, including:

Revitalization of Existing Properties – Partnering with local Macau real estate developers to repurpose aging casino annex buildings into “tech-art hotels”, retaining historic architectural exteriors while embedding intelligent management systems (Xie & Kwok, 2017).

Strategic Brand Collaborations – Co-branding with social media platforms such as Xiaohongshu (Little Red Book) and Bilibili to launch “Gen-Z Themed Hotels”, leveraging social commerce-driven pre-sales and cross-platform membership integration to rapidly build market presence (Yoelao, 2024).

6.2. Conclusion: From “Space Providers” to “Value Co-Creators”

This study highlights a critical paradigm shift: in Macau's post-gaming era, a hotel's core competitiveness is no longer defined by the opulence of its physical space but rather by the depth of emotional resonance it creates with guests.

The success of Morpheus Hotel validates the potential of anti-luxury strategies in highly saturated hospitality markets—when extravagance becomes the default aesthetic in Macau, minimalism itself emerges as a scarce luxury symbol (Tynan et al., 2010).

For mainland Chinese hotel brands, Macau serves as both a testing ground for internationalization and a laboratory for cultural fusion. Their breakthrough strategy should not focus solely on replicating Morpheus Hotel's architectural design,

but rather on adopting its core philosophy of “subtraction as an addition”:

Subtraction – Eliminating dependence on traditional luxury elements and focusing on addressing deeper consumer needs within niche segments.

Addition – Leveraging technology, wellness, and cultural narratives to create an unparalleled experiential moat that competitors cannot easily replicate.

A key strategic opportunity arises from the research of Barat (2021a, 2021b), which suggests that with the emergence of the Hengqin-Macau Deep Cooperation Zone and its cross-border consumer ecosystem, mainland hotel brands can capitalize on the “Macau Hotel + Hengqin Wellness Services” model. This innovative approach may give rise to a new breed of luxury hotels within the Greater Bay Area, redefining the future of high-end hospitality in Macau and beyond.

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