

Versatile Hospitality Industry Across The Globe A Case Study on Development and Challenges in Hospitality Industry in Australia

Varun Tripathi¹, Gaurav R Salian², Nandini Roy³, Ashish Nevgi⁴

Student, Thakur Institute of Hotel Management, Thakur Shyamnarayan Degree College, Mumbai, India¹

Assistant Professor, Thakur Institute of Hotel Management, Thakur Shyamnarayan Degree College, Mumbai, India^{2,3}

Coordinator, Thakur Institute of Hotel Management, Thakur Shyamnarayan Degree College, Mumbai, India⁴

Abstract: *This case study provides information and data on the Hospitality sector. It focuses on the development and challenges face by the Australian hospitality Industry. The Australian and New Zealand Standard Industrial Classification (ANZSIC) categorises the Hospitality sector as encompassing businesses that provide accommodation, food and beverages such as cafes, restaurants and takeaway food services; pubs, taverns and bars; hotels, motels and other accommodation and hospitality clubs.*

Key Hospitality occupations include:

- *Cafe and Restaurant Managers*
- *Retail Managers*
- *Bar Attendants and Baristas*
- *Cafe Workers*
- *Waiters*
- *Sales Assistants*
- *Receptionists*
- *Hotel and Motel Managers*
- *Hotel Service Managers.*

This sector has been growing steadily with growth attributed to factors such as a growing 'foodie' culture, the popularity among many individuals to owning a hospitality business, population growth and an increase in consumer demand...

Keywords: Dining, Industry, Food & Beverage, Guest

I. INTRODUCTION

Let's start at the beginning and explain what hospitality really is. Hospitality is the friendly gesture that is showered on those that visit a new place. We show hospitality in many forms.

Hospitality is a gesture you use even as you welcome guests into your home. So, consider this definition as we continue through the lesson.

Australia is known for its friendliness. While the hospitality may come at a price, some individuals with the proper visas (e.g., working holiday visas) are given the opportunity to help or work for their stay. While this may seem odd to us, it is very common for tourists or backpackers with proper visas to work in exchange for room and board.

Hospitality is based on the way people are treated. So let's take a minute to break down the hospitality industries into categories. As we mention each category, let's consider why that category is so important to the hospitality industry in Australia:

1. Dining- Dining is a very important category. Australia is known for their barbecue; you can find people cooking barbecue even in the local parks. Food is a part of the people in Australia. However, like mentioned earlier, things are more expensive in Australia, so be prepared to spend a little more than normal on all types of food venues.
2. Hotels - What about the place you choose to stay? Like any location, there will be price differences according

to your preferences. In Australia, you can choose between hostels, private rooms, budget hotels, chain hotels and even camping. Obviously, it all comes down to the price. Australia is working on making their chain hotels be considered an all-in-one, meaning you can sleep, eat, shop and more all in the same location.

3. Entertainment- How does the entertainment industry relate to the hospitality industry? Entertainment opportunities are very important to the hospitality industry. These opportunities help distinguish them from other locations.

In Australia, the hospitality industry is one of the most developed industries which is characterised by the significant economic progress and revenues and by the close connection with the international market, depending on its trends. Travel, tourism, and hospitality industries are associated, and there are a lot of factors which affect the companies' development within this economic and market sector.

The most influential companies which operate within the industry in Australia are Accor and the Intercontinental Hotels Group (IHG) which are also competitors at the international arena. To analyse the particular features of the companies' strategic development and compare and contrast their strong and weak qualities, it is necessary to pay attention to the major factors which affect the companies' strategic direction and their openness to innovations in order to predict the companies' possible successes in the future.

NOW, Let's talk about development in Hospitality industry in Australia

In July—the middle of Australia's winter—a report suggested that the country's hotel scene would likely see a construction boom lasting for at least another two years as tourism spending, predicted to reach \$167 billion by 2025, plays an ever-larger role in Australia's economy.

The good times are still rolling as spring comes to Australia: The country's hotel market, particularly in Sydney and Melbourne, is experiencing an “unprecedented alignment of positive fundamental indicators,” according to Gus Moors, head of hotels for Colliers International.

The first nine months of 2016 saw about \$1.7 billion of hotel transactions take place in Australia, including the \$700-million Zhengtang Group investment into Sydney's Ribbon development. High occupancy rates, a benign supply outlook and increased air capacity from key markets like China and India mean that hotels are likely to keep proving profitable.

International passenger traffic to and from Australia reached record levels last year at 34.9 million, up from 33.1 million in 2014. Annual growth has been consistent at more than 5 percent in passenger movements on international airlines to and from Australia over the past five years.

The recently released Central Sydney Planning Strategy identifies 10 “key moves” to ensure the city can adapt to the projected growth over the next 20 years, with mixed-use developments as a key focus. These projects let developers leverage greater floor space ratio and height.

“The difference with this particular development cycle versus historic ones is that it is underpinned by strong fundamentals, backed by tourism-generating infrastructure like the International Convention Centre, and capped off by a strong appetite for hotel investment opportunities driven by onshore and offshore investors,” Moors wrote. “When this is combined with mixed-use offerings—retail, residential and commercial—it helps to ensure the viability and long-term sustainability of hotel development projects.”

II. EMPLOYMENT

The employment level for the accommodation sector remained fairly stable between 2001 and 2019, apart from some minor fluctuations. In 2020, however, figures declined significantly from 105,500 in 2019 to 76,400 in 2020, representing the lowest employment level recorded since 2000. This has increased in 2021 to 92,400, with projections indicating a growth in employments levels to 101,000 by 2025. The food and beverage services sector also experienced a notable decline between 2019 and 2020 (from 818,900 to 575,400), after two decades of strong growth which began in 2001 at 519,400. Employment levels increased by 38% in 2021 to 795,200, which are projected to further increase to 846,400 by 2025.

All Hospitality-related occupations are projected to show growth to 2025, with the strongest growth expected for Sales Assistants (General) (25%), Waiters (18%) and Chefs (16%).

III. ECONOMIC

The restaurant and food service industry is an integral contributor to the economy of Australia as a whole; the hospitality industry provides a large number of employment opportunities for Australians, and in tandem with the tourism industry contributes significantly to Australia's gross domestic product (GDP). It includes restaurants, fast food chains, franchises, cafes, and restaurants as well as other types of hospitality services

CONTRIBUTION OF HOSPITALITY INDUSTRY TO AUSTRALIAN ECONOMY

Modern Design

Tourism Accommodation Australia CEO Carol Giuseppi said that the massive expansion of Australia's hotel industry—as well as a renewed focus on design—would play a crucial role in sustaining Australia's record-breaking tourism performance.

“The biggest trends influencing the new hotel design include an emphasis on localism, community, individualism, art and sustainability,” said Giuseppi in a statement. “Hotels are being designed to complement the local landscape, with street art, edgy design and a focus on local produce on restaurant, bar and function menus.”

These changes, Giuseppi added, are driven by new demands from travelers, particularly those in the millennial generation. “Technology has been a key focus for hotels. Not only are most Australian hotels offering at least some level of free Wi-fi, but connection speeds are faster and the new breed of hotels are offering casting capability to their in-room screens. Keyless entry to rooms has been introduced and increasingly guests will be able to select their specific room type in advance.”

New demands have also driven changes to the design of hotel lobbies and reception areas, with “living rooms” encouraging socialization and quality dining options emphasizing localized fare. The new generation of hotels has attracted a new generation of designers, who are seizing the opportunity to make a statement with their designs. Significantly, the report says, hotel design today is aimed at complementing the landscape, becoming an integral component of the local area.

Co-working spaces

Hotels are increasingly being designed to cater for mobile workers. Singapore-based Next Story Group will launch its first combined co-working space and hotel brand called Kafnu in Sydney's Alexandria in the next year.

Going natural

Hotel designers are increasingly incorporating natural design elements into hotels with vertical hydroponic gardens, indoor waterfalls, multilevel terraces and rustic wooden furnishings enabling guests to connect with nature.

Localized F&B

Hotel restaurants are being redesigned to provide more distinctive local experiences, with a focus on regional produce, wines and craft beers

Wellness

Wellness options include yoga rooms, 24-hour gyms, and health-conscious menus “The new wave of hotel development is covering all price points—from economy to luxury,” said Giuseppi. “New hotel design has allowed for rooms to be made more compact by better utilization of space and this has enabled hotel development costs to be kept competitive.

Never before has the Australian hotel industry seen such cutting-edge innovation that is not only meeting changing travel trends, but in many cases anticipating them as well.”

IV. CHALLENGES FACE BY HOSPITALITY INDUSTRY

The Australian hotel sector is dynamic. Issues arise because of globalisation and increased customer expectations. The sector has growth potential. Implementation of technology-based solutions become challenging. Wealthy customers demand great and fast services. Leisure activities within the hotel sector attract customers. Although gaining customer loyalty becomes challenging. The reason is a large number of hotels competing within the same geographical region.

Therefore, keeping valued customers become a challenge. The attitudes of customers change due to the availability of options. Cultural preferences and food habits vary, as well. Visitors around the world have diversified aesthetic tastes and traditions.

Changing expectations of customers hinder the growth of the hotel sector.

The hotel sector faces internal challenges, as well. Employee retention becomes challenging because job seekers are unwilling to work for 24/7. The job is quite demanding, and therefore, the hotel sector faces a huge turnover rate. There is a dearth of skilled professionals. Labour costs within the sector are rising. Communication needs have diversified as people from different backgrounds apply for jobs. During peak seasons, the sector does a profitable business. However, the hospitality and tourism industry is seasonal in nature. Constant revenue generation becomes an issue. The sector faces tremendous loss after the end of peak seasons (festivals and occasions).

Challenges

1. Stiff competition

As increasing numbers of visitors arrive, more businesses start popping up to service them. Some will sacrifice quality in their fight for the tourist dollar – which can give the whole industry a bad name.

With more food, accommodation and entertainment choices on hand, it's harder to get a slice of the visitor spend. The market gets diluted and it's tough to make your business stand out from the crowd.

2. Hotel squeeze

Established hotels both large and small are losing trade to online giant Airbnb. Significantly higher overheads and a less flexible business model make it harder for traditional hotels and guest houses to compete with a wealth of cheaper homestays. Millennial consumers favour agile food and accommodation options which give them the freedom to 'travel light'.

3. Saturated food market

The growth of mobile and pop-up food traders is challenging more traditional restaurants to up their game. Online food platforms make it easy to find and order fast food at home.

Smart operators are offering a wide selection of fare including healthier, organic and specialist-diet options. This appeals to a younger demographic now demanding higher quality and wider range in the food they select.

4. Crippling operating costs

Online food outlets are bypassing the need for expensive bricks-and-mortar premises. Their costs are therefore lower and more manageable.

Penalty rates, labour costs, tax and GST requirements are also taking their toll on many hospitality organizations.

Credit card and eftpos fees can therefore add to the financial burden.

Loyal, productive workers and reduced staff turnover can make all the difference to your prospects in a tough industry[1].

V. OTHER MAJOR CHALLENGE related to MANAGEMENT

The work that comes with hotel management is not always easy. Hotel managers are often forced to juggle a number of tasks at any given time from making sure that the books are balanced to ensuring that everything is running smoothly. In this article, we have outlined 6 management issues in the hospitality industry.

Because the hospitality industry is one of the fastest-growing sectors in the world, it has been characterized by continued technological advancements.

These advancements have done wonders to improve organization, efficiency and customer experience.

However, they have also brought with them major issues facing the hospitality industry have affected the way hotels and other services are operated.

These issues create bottlenecks which impede the expected growth. A better understanding of these management issues would give the hoteliers and hospitality managers a clear edge over the competition.

1. The Constantly Changing Expectations of Customers

The customer is the King in the hotel industry or hospitality industry on the whole.

The whole purpose of the industry is to keep customers happy. But the margins are now decreasing.

Keeping customers happy is not enough anymore. As a Hotel Manager, you need to find ways to delight customers now.

You would need to find a way to bridge the gap between perception and actual delight.

As you can see in the image above delight only happens 16% of the time. That gap between reality and the perception needs to be filled.

Even the service that delighted customers last time would now be an expectation. So, delighting customers in the hospitality industry is getting more difficult with changing customer expectations.

Changing times have brought about changed demands from customers.

Managers in the hospitality industry are facing completely different problems today than they did in the past owing to new technological advancements and different customer behaviour. With the emergence of apps, for instance, consumers are now beginning to expect a level of convenience and efficiency that must be catered to.

So, taking a cue from the social media and digital channels, the hotel managers must act to surpass and delight their customers' every time they walk in.

2. Continued Technological Changes and regular innovation

Today, hotel guest are more tech-savvy than ever. Dealing effectively and profitably with this savviness is one of the top management issues in the hospitality industry today.

When they choose to stay in one hotel over the other, they expect to find free Wi-Fi, flat- screen TVs, USB ports and so on. Hotels and other businesses in the hospitality industry are relying heavily on technology to streamline their services.

Keeping up with technology is one of the major issues faced by hotel managers, but when dealt with properly, it is definitely worth it.

3. Political and Security challenges

This again is one of the top management issues in the hospitality industry.

The issue of managing the macro issues dealing with the socio-political as well as economic challenges.

The threat of terrorism today has changed how people travel and where they travel. Hotel managers are tasked with the duty of ensuring that proper surveillance systems are installed and maintained throughout so that guests can feel comfortable and safe.

To deal with security challenged, hotel managers have to rely on high tech gadgets and software, which can be expensive to acquire and maintain.

According to studies from the Journal of Hotel and Business Management, a lot of macro, as well as micro factors, account for security threats[2].

These range from micro issues like Data theft to macro issues like Terrorism.

A lot of countries like Egypt, Turkey, Syria etc. have faced issues due to terrorism while political and economic issues have hurt economies like Greece, Portugal etc. in the past.

The issue is serious whether we discuss data and credit card security to life hazards and terrorist threats. Hotel Managers need to anticipate as well as study any potential threats and be prepared to minimise losses in such a situation or to prevent it altogether.

Risk Management is thus a crucial point to cover for all hospitality Managers.

Check out the infographic below to understand the various facets of risks that needs to be managed. These are pretty much required and evident in the case of hospitality and tourism as well.

Events like the Covid pandemic have only stressed on better risk management for hospitality organisations.

4. Skilled labour shortage, staff turnover and Irregular working hours

This is one of the major challenges in the hotel industry. Staff turnover in the hospitality industry is almost double the average across industries.

This can be said to be the biggest management issue in the hotel industry.

In recent years, the high turnover and increasing competition have only added flame to the issue of the skilled labour shortage in the hospitality industry on the whole.

Because customers expect a lot more nowadays, employees in the hospitality industry, in turn, are forced to deal with long and sometimes irregular working hours[4].

To make sure that everything is running smoothly at all times, managers have to find new ways to manage their stress because they cannot afford to lose it or burnout.

According to a lot of research works, salary is the most important factor to consider for retaining the best staff in the hospitality industry.

5. Booking and Revenue challenges

Today, guests have several options to choose from, which has forced managers to up their marketing and advertising game.

This has created revenue challenges whereby if managers are unable to keep up with their competitors, they risk losing loyal customers and share of the local business. It is thus important to understand the booking ecosystem and have the best strategic partners in place. Increasing cost and decreasing revenue come up as one of the key management issues in the hospitality industry.

6. Seasonality of the hospitality industry

Peak seasons in the hospitality industry tend to bring a lot of business but it also brings with it undue stress to the management and its staff.

Managers are also charged with the responsibility of keeping up with the ongoing changes in booking and pricing, which can be daunting for anyone.

Everyone is required to make the most during peak season.

While more staff, as well as resources, are required during peak season, the percentage drop heavily during the lean season making it difficult for hospitality managers to ensure profitability.

Innovation, diversification and effective management would continue to hold the key in terms of managing the issue of seasonality in the hospitality industry[5].

VI. LITERATURE REVIEW

Adelaide SkyCity recently hosted the 12th AHICE (Australasian Hotel Industry Conference & Exhibition) with leading industry experts at the most prestigious hotel conference in Australasia.

The theme for the 2021 conference was 'The Next Decade: Planning for the Future of the Australasian Hotel Industry' and has attracted world-class speakers.

The AHICE advisory council made up of leading hoteliers from Australia and New Zealand met to identify the industry's challenges and opportunities. Key topics which were presented at AHICE 2021 included: Latest Trends, Market Analysis and Market Research, Technology and more.

The CEO of Tourism Accommodation Australia (TAA), Michael Johnson held a presentation covering the Association Outlook. Mr Johnson started his presentation by saying, "I have spent my working life in bustling hotels... in busy lobbies full of guests and staff and noise

and movement, you can get things done sitting alone in front of a screen full of faces...but for someone like me... someone who likes to socialise, have a chat and look people in the eye... it's just not the same".

No, it is not the same; indeed, the pandemic has decimated the travel industry that prior to the event was experiencing unprecedented growth and the pandemic has not just decimated the business but has also left some deep gaps that are challenging to fill.

Mr Johnson emphasised the 'unprecedented' events that Australia has experienced in the past 18 months. The bushfire which ravaged regional Australia and damaged the tourism sector from September 2019 till March 2020, then in March, the Covid-19 pandemic happened, which brought the closure of state and international borders, state lockdowns and capacity restrictions, all these events have been unprecedented[6].

Mr Johnson summed it up beautifully and said, “while I risk taking all power and meaning from the word... the only way I can describe the current employment shortage crisis facing our industry today is – somewhat predictably – unprecedented”.

He touched on another issue that has been affecting the hospitality industry for a long time, the skills shortage and retention of staff.

Mr Johnson said, “anybody who has worked in a hotel in the last decade knows that getting and retaining staff has been a problem for a long time”.

However, the last year this problem has grown into something much more worrying.

The global pandemic not only distracted governments and business from tackling our staffing issues it also created a unique set of conditions that have made it worsen ten-fold.

When Mr Johnson took over the reins of TAA in March 2019, the Australian hotel industry was flourishing with a wave of a constructions and design-driven development.

Between 2017 and 2019, more than 40 new hotels entered the market, and a further 270 new hotels were on the way. More than 50,000 new rooms were planned to be added in the next two years.

The industry was worth \$8 billion to the Australian economy and at the time employed more than 187,000 people directly and indirectly[7].

Then the coronavirus pandemic hit the world, and that changed the ball game.

The next 15 months, and certainly since last August, the hotel industry in different parts of the country endured shutdowns, lockdowns, border closures and capacity restrictions.

The international market was lost due to the closure of our borders, events and conferencing disappeared, and so did the confidence [9].

The industry has not only lost long term and skilled employees, but it has also lost the international students, working holidays makers and temporary skilled visa holder [11].

These workers were the lifeblood of the industry, and they have since left the country, unable to return or be replaced.

According to a recent nationwide survey of AHA and TAA participants, a significant 73 per cent of hotels claim their company is struggling financially due to a skills shortage.

Only in NSW, the TAA estimates a shortage of 3800 employees in hotels currently.

The shortage of skilled workers across Australia is crippling the hospitality industry still heavily impacted by COVID.

Mr Johnson, alongside AHA CEO Stephen Ferguson, has asked for regulatory changes to migration provisions to assist the industry to overcome critical labour and skills shortages caused by the pandemic.

The following recommendation for short-term support was made:

- Remove the cap off the international students who are here and to allow the return of international students and working holidaymakers.
- Allow International students working in hospitality to work more than 40hrs per fortnight.
- List Hospitality (including accommodation) as a critical sector for the subclass 408 Temporary Activity Visa.
- WHM VISA holders working in tourism to be able to work for the same employer for more than six months in rural and remote areas of Australia.
- Cooks and chefs to be added to the Priority Migration Skilled Occupation List

VII. SUMMARY

The work that comes with hotel management is not always easy. Hotel managers are often forced to juggle a number of tasks at any given time from making sure that the books are balanced to ensuring that everything is running smoothly. In this article, we have outlined 6 management issues in the hospitality industry.

Because the hospitality industry is one of the fastest-growing sectors in the world, it has been characterised by continued technological advancements[8].

These advancements have done wonders to improve organisation, efficiency and customer experience.

However, they have also brought with them major issues facing the hospitality industry have affected the way hotels and other services are operated.

These issues create bottlenecks which impede the expected growth. A better understanding of these management issues would give the hoteliers and hospitality managers a clear edge over the competition.

The TAA is also working to develop more interest for young people to choose the hospitality industry. Hotel advisory groups in NSW are working with TAFE to boost support for hotel recruitment as well as including school-leavers, apprentices and trainees and upskilling existing hotel employees. There are signs of improvement in regional areas that are leading the way to recovery, but the major gateways of Sydney and Melbourne are still suffering. TAA pushed for the accommodation voucher program for Sydney, and we are now working with NSW Treasury to finalise procedures for a June implementation. In closing, Mr Johnson said, "of course, the relaxation of restrictions remains a major concern... and it is impeding our outlets' ability to maximise revenues... even if they have employees to do the work[12]."

VIII. CONCLUSION

SWOT ANALYSIS:

The industry has acknowledged that changes need to be made within the industry to slow attrition from the industry and to ensure that strategic initiatives are better able to impact on the skills shortage. The first challenge in making the industry more attractive (thereby stopping employees leaving the industry) is the capacity of employers to improve conditions (both wages and other conditions). The capacity of employers to improve conditions is directly linked to the lack of profitability in the industry. As noted above the average restaurant makes 4% profit before tax and 63% of businesses (those with 10 employees or less) make 2% net profit. At this level of profitability there is very little scope for employers to pay higher wages or provide additional benefits to employees. The questions of what would make the industry more sustainable and what would increase profitability in the restaurant and catering industry are beyond the scope of this report. These have been canvassed in a range of submissions recently (including the House of Representatives Standing Committee on Economics, Finance and Public Administration Inquiry into the current and future directions of Australia's service industries) and the Restaurant & Catering Industry Action Agenda. The reports are available if the Committee wishes to investigate these areas further. The areas of broad impact on industry sustainability are:

- The yield generated from visitation;
- The taxation treatment of the hospitality industry;
- The impact of workplace relations arrangements on the hospitality industry, and;
- The level of regulation of foodservice businesses.

In addition to industry sustainability, the professionalism and conduct of employers within the hospitality industry has an impact on attrition and the extent to which skills shortage initiatives are effective.

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