



RESEARCH REPORT

Redefining the Guest to Design
Business-Resilient Hotels

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HOTEL

Redefining the Guest
to Design Business-
Resilient Hotels



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RESEARCH QUESTIONS

Why is the hospitality industry vulnerable to crises?

How can design help mitigate this vulnerability?

How can a hotel play an active role in its community?

Abstract

The hospitality industry has always experienced market volatility, and is particularly vulnerable to global and regional crises of all forms. This document aims to break down the impacts of past crises in order to understand the role proactive design can play in flattening market curves in the future.

External factors and consumer choice directly influence the industry's ability to respond during a crisis. By redefining the guest to include a diversified user base that specifically targets local segments, hotels can leverage overlapping drivers to expand their opportunities for atypical yet synergistic revenue streams.

We propose that proactive design solutions can help diversify the user base of hotels to improve business resiliency while enhancing the everyday experience of each guest who walks through the door.

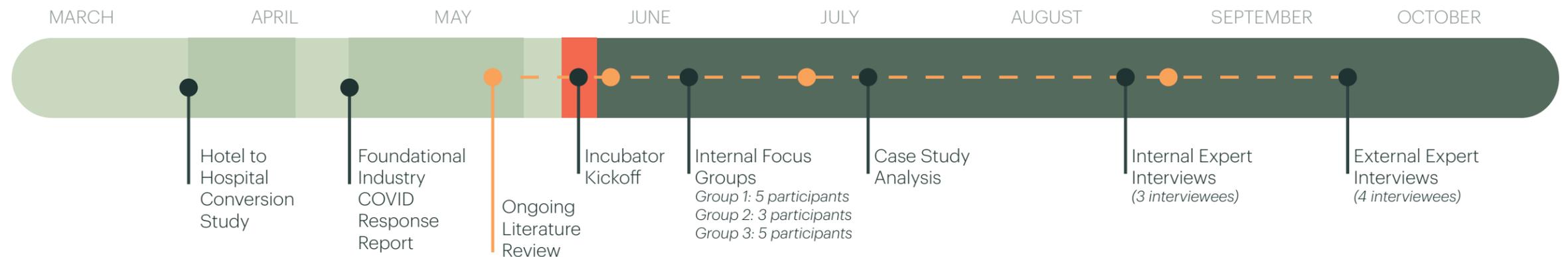
This report explores the foundational research and design framework behind these proactive solutions, which are developed further in an accompanying toolkit.

Methodology

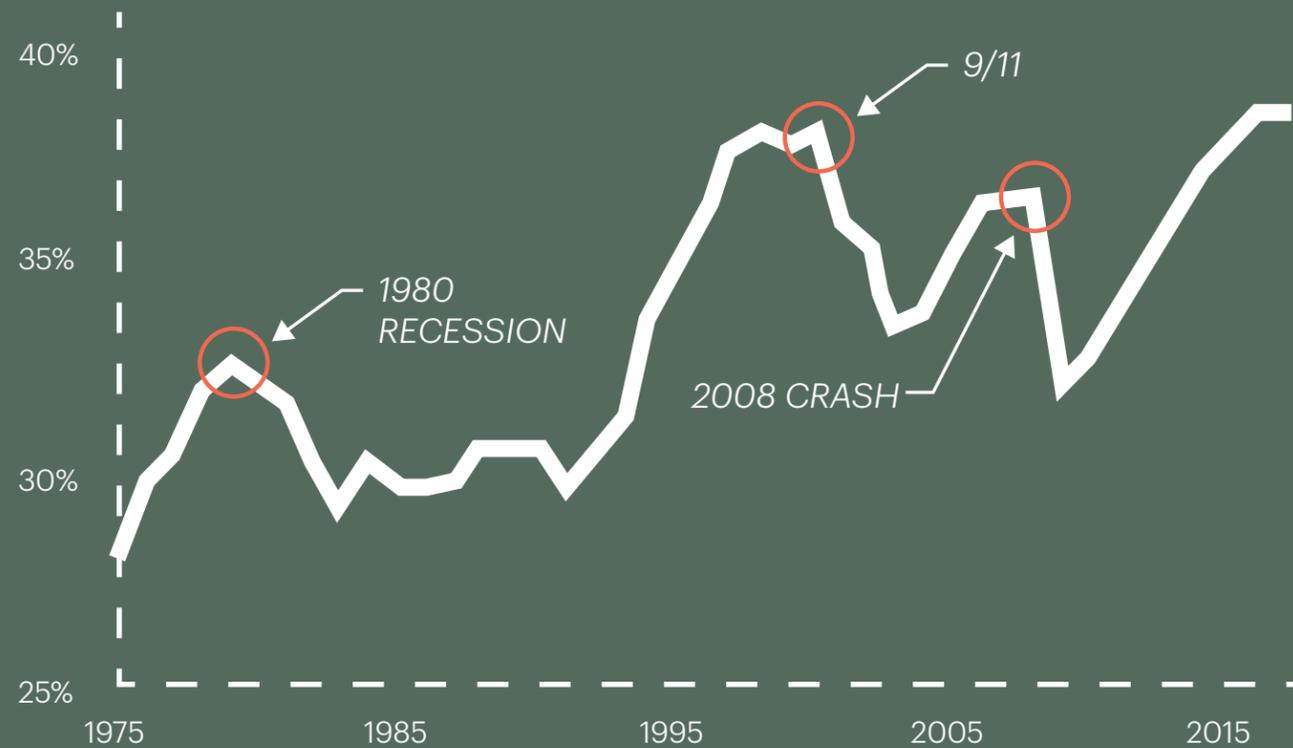
The methodology of this research project included an industry study of Post-COVID reopening guidelines, a literature review, internal focus groups, case study analyses, and subject matter expert interviews. Throughout the research process, we performed a literature review of relevant industry publications, journals, and reports. We also garnered valuable insights from focus groups and interviews, which are further distilled within the report. Three focus groups, which consisted of a total of thirteen HKS hospitality team members, gave us an initial understanding of the volatility of the industry and helped identify the framework for sorting design strategies. Next, we performed in-depth case study analyses, focusing on hotels and brands with exemplary diversification of revenue streams and programming. Following this step, we performed subject matter expert interviews with three internal experts and four external experts in order to understand the potential for innovation within the industry. All interviews and focus groups were conducted using Zoom and video recorded for further analysis and synthesis. This methodology is illustrated in the timeline below.

HKS Research Incubator

This project is part of the 2020 cohort of HKS Research Incubator projects. The Incubator is a program supported by the research enterprise empowering practitioners to invest time and energy in meaningful research initiatives that allow us to lead with knowledge, advise for influence, and achieve better outcomes.



GROSS OPERATING PROFIT AS % OF TOTAL OPERATING REVENUE



The Hospitality Industry's tight profit margins put it at a disadvantage out of the gate during economic downturns.

Based on graph of U.S. trends from CBRE 2018 Trends in the Hotel Industry

Flatten the Curve

Thus far, forty percent of jobs lost in the United States due to the COVID-19 crisis have been in the leisure and hospitality industry, despite it making up only 11% of the workforce¹. The devastation of COVID-19 is just an extreme manifestation of the same fragility that the 9/11 fallout and 2008 recession brought to light. The unimaginable scale of this crisis does not mean that the conditions and consequences it caused do not echo those that have come before.

The next crisis could come from anywhere — from natural disasters to terrorism, from an economic crash to another pandemic— but they will all have similar repercussions on the hospitality industry. This highlights that we can learn from the industry's response to past crises.

“History doesn't repeat itself, but it rhymes.”

-Mark Twain

By understanding the conditions that have made the hospitality industry particularly vulnerable to past crises, we can anticipate their future impacts. Proactive design can integrate these insights to increase business resiliency and maintain steady revenue streams in the industry both during and outside of crises.

Innovation Came Too Late

The COVID-19 crisis sparked a global brainstorming session. Partners across the industry pushed for innovative solutions that would pad the bottom line as the industry plummeted towards rock bottom. While this effort proved the dexterity and resourcefulness of the people in the industry, slow innovation prior to the crisis limited the effectiveness of these retroactive solutions.

“If you have always done it that way, then it is probably wrong.”

-Charles Kettering

In the moment of crisis, solutions were a band-aid on a broken arm. This is largely because the hospitality industry is “prone to taking a wait-and-see approach” not only to the crisis, but to innovation itself². Tight profit margins leave little capital to invest in testing the waters with new ideas.

However, proactive design can give properties options to pivot in response to market trends and control how they handle crises. The industry should plan ahead for the next crisis by building in solutions that address its vulnerability from the beginning. Innovation can balance the pendulum as it swings, not only in response to global crises, but to seasonal and regional fluctuations with which the industry is already familiar.

\$30,000

average post-COVID re-opening expenses per 150-key hotel³

\$9 billion

expected yearly cost for new hospitality industry COVID-19 protocols⁴

What has influenced your decision not to book or undertake travel yet?

69%

don't want potential hassle of quarantine during or after trip

68%

concerned about their health

51%

concerned about traveling to the destination

20%

financial reasons due to COVID-19

44%

concerned about last-minute cancellation

Insights from STR's October 2020 Travel Pulse Survey

Travel is a Choice

While there is not a single disruptor that contributes to the industry's volatility, they all have a single root— travel is a choice. This choice is dependent on both risks and rewards. People choose to travel because there is some form of return, and people choose not to travel if it threatens their physical, emotional, or economic security.

During a crisis, the risk of travel often does not outweigh the reward. People will choose to forgo riskier situations in return for more stable rewards. However, the hospitality industry does not have control over many of these risks — external factors, such as local regulations or the safety of air travel can have devastating impacts on hotel occupancy. These external factors also make it difficult to predict which properties or destinations a crisis will hit the hardest.

While prior crises have posed specific risks to travel, during the COVID-19 crisis travelers had to juggle the risks of financial distress, health concerns, the closure of tourist destinations, event cancellations, protocol hassles, and local restrictions. Hotel occupancy rates during the crisis reflect a clear consumer choice — the risk of travel was not worth the reward.

This risk-reward balance of travel can be illustrated through Maslow's Hierarchy of needs, a commonly used psychological framework for understanding the drivers behind human choices. Maslow's theory states that a person does not seek out higher levels of the pyramid if the lower levels are threatened or unsatisfied. People travel in order to fulfill higher tiers of the pyramid, but their physiological and security needs must be met⁵. When a crisis threatens these needs, people will choose to stay home where these needs are met, and they will reach for higher tiers through other actions and activities.

**“We wander for distraction,
we travel for fulfillment.”**

-Hilaire Belloc

Hotels function within a niche between the lower and higher needs on the pyramid. Their revenue largely comes from providing guests' basic needs, but they also play a role in helping guests to actualize the higher goals that led them to travel. However, hotels will have to find other ways to respond when external factors threaten guests' basic needs outside of their control.



Heads in Beds

Every industry is, in some form, based on consumer choice, so what makes the hospitality industry especially volatile?

Across the industry, most hotel business models are focused on putting heads in beds. On average, over 80% of hotel profit comes from guest room rentals, despite the fact that only about a third of our lives are dedicated to sleeping. When people choose (or are forced) to stay home, they don't need a bed, which limits the current model's ability to maintain revenue. Because a hotel's inventory is not a product, but the rental of space, even a short regional crisis, timed during the wrong season, can have major impacts on a property's profit.

While it is likely impossible to completely make up for lost guest room revenue during a crisis, seeking ancillary revenue streams that play into guests' other wants and needs can help pad the bottom line. During the COVID-19 crisis, resorts, which already offer additional services and activities as part of their packages, saw a 26% increase in their ancillary revenue profit in August 2020 when compared to August 2019, despite a decrease in profit from guest room rentals. Other hotel typologies did not see a significant change in their ancillary revenue streams⁶. Because these offerings were already built-in to resorts, they were able to uncouple them from guestroom packages and offer them as individual services.



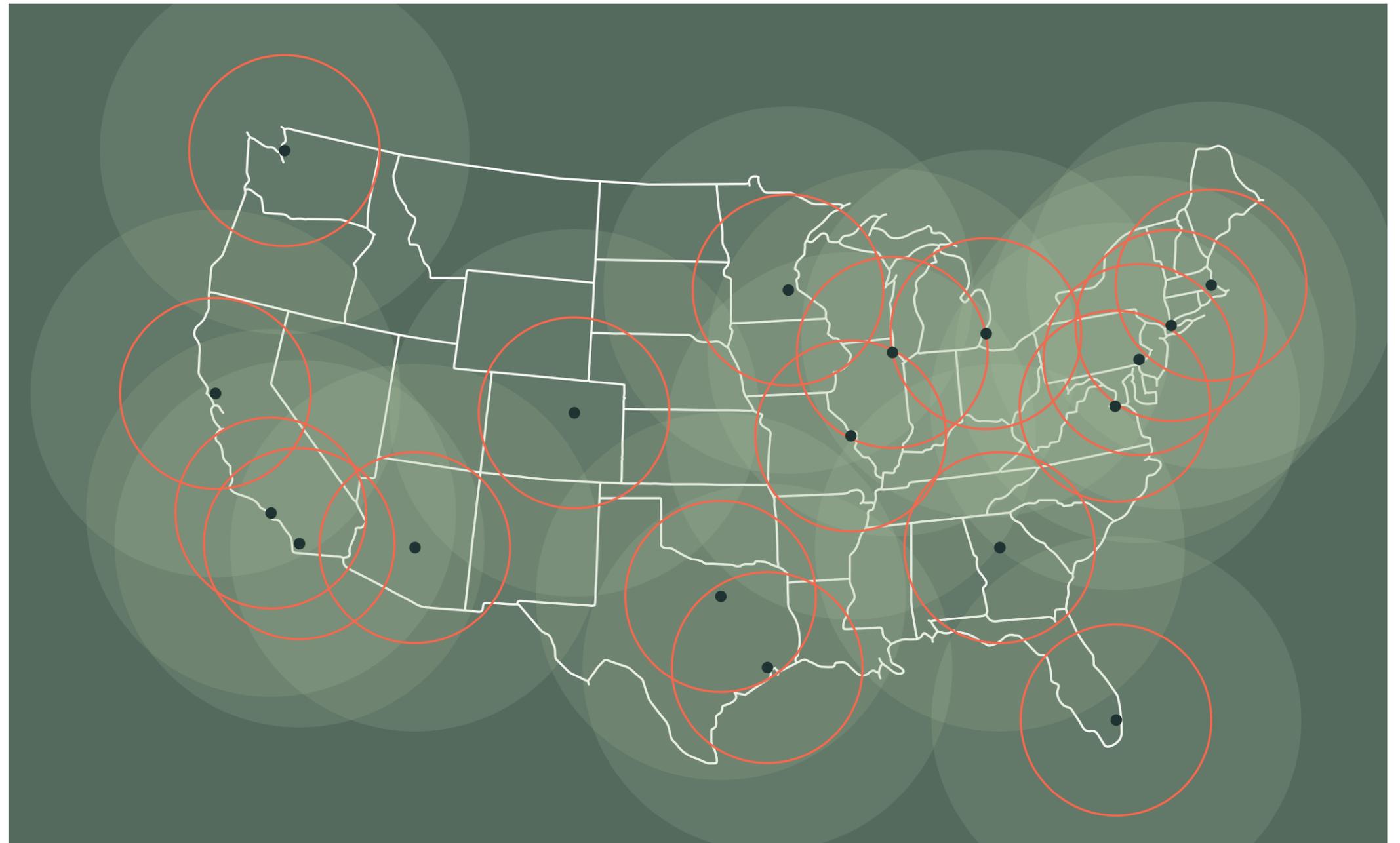
On average, 81.7% of hotel profit in 2015 came from guest room rentals⁷ — but only about a third of our lives are dedicated to sleeping.

Travel is Essential

The good news is that although travel is a choice, this choice is more about *where* to travel than whether or not to travel at all. In tough times, people still need a way to connect with others and find an escape from their everyday lives. A survey conducted by STR in October 2020 found that more than 40% of respondents had taken at least one overnight trip during the lockdown. The same survey found that 68% of people were still as likely or more likely to travel domestically in the next two years compared to their usual (non-pandemic) travel habits, whereas only 37% of respondents said the same for international travel⁸. Similarly, China saw a consistent domestic demand increase in 2020, with their occupancy rates reaching similar levels to 2019 during the October holiday season despite border closures.⁹

The choice is more about where to travel than whether or not to travel at all.

Although people are still traveling, they're staying closer to home. Regional and domestic travel costs less, does not include the risk of air travel, and allows for shorter breaks in uncertain times. While the safety of air travel is not always a concern, cost and uncertainty are both factors that play a role in travel demand during any crisis.



“People want to travel, they just don’t want to get on airplanes... they do want to get out of the house.”

—Brian Chesky, Airbnb co-founder¹⁰

The industry has seen traditional drive-to market radii grow from 250 miles to 500 miles during the COVID crisis.¹¹ This puts most destinations in the US within a drive-to market of one of the top 20 most populous metro areas, as shown on the map above¹².

Diversify User Base

If people are staying closer to home, this means that hotels have the opportunity to maintain revenue streams during crises by establishing a steady base of local users. If the hotel is designed as a destination for locals as well as travelers, it will be more likely to receive traffic and even attract locals for “staycations” and other activities during a crisis.

This way, hotels can provide services related to other areas of life for those who aren’t looking for a place to sleep. The hotel can diversify its user base by understanding how it can fulfill community needs in order to become a hub for activity in the neighborhood. This in turn can drive business resiliency through alternate revenue streams that are synergistic with the hotel’s traditional uses.

In addition to alleviating revenue fluctuations, appealing to local segments can also enhance the guest experience during normal operations. A variety of users can generate a more dynamic atmosphere that cross-pollinates travelers and locals, making it attractive as a destination in itself.

Culture Trip’s 2019 Beyond Borders report found that “81% of people believe the only way to understand a place is to experience it like a local.”¹³ While many hotels have regionally-inspired design, the hotel should engage communities at a deeper level, striving to be a space that both locals and travelers find enjoyable and useful. A 2019 AARP survey found that 46% of respondents who chose to rent a private home instead of a hotel said it was because they wanted to “live like a local.”¹⁴ However, hotels can uniquely compete with the growing popularity of rental properties by designing immersive spaces for interaction.

Expanding the targeted segments of the market can therefore provide travelers an intangible amenity: a unique connection to the destination’s culture. But in order to ensure success, there will have to be a paradigm shift in how the word “guest” is defined in the hospitality industry.



46%

global travelers want tips from hotels about “non-tourist” activities¹⁸

59%

global travelers say they want to plan more in advance but find it difficult to know what to do locally²⁰

20%

of global travelers currently get vacation activity ideas from their hotel¹⁹

Insights from Cornell University School of Hotel Administration Drivers of Change in Hospitality Report

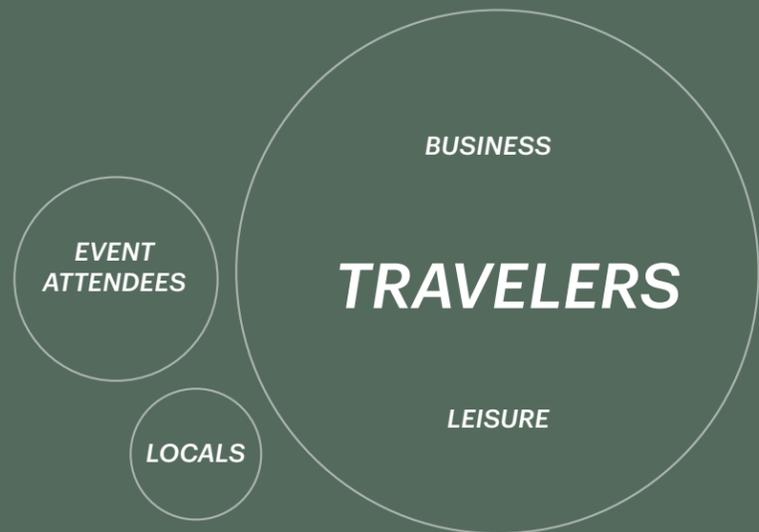
An Edge Over Short-term Rentals

Short-term rentals are revered as a way for travelers to immerse themselves into a community and break from the typical “tourist” experience. They originally allowed guests to stay with locals in individual rentals, but they have now evolved to a point that most “hosts” own multiple properties, and many guests never meet their host in person¹⁵.

The expansion and popularity of Airbnb has also contributed to rent spikes in many destinations. A study by the Harvard Business Review found that 1/5 of annual increases in US rental rates are attributed to Airbnb growth.¹⁶ This prices locals out of the destinations and sterilizes the culture that drew guests to those neighborhoods in the first place. It also creates a sense of resentment for remaining locals¹⁷.

While these destinations rely on tourism to sustain the economy, the impact Airbnb has had on housing markets creates tensions between tourists and those living in the community, preventing true connections between tourists and locals and creating an “us vs. them” mentality.

Hotels, on the other hand, are subject to greater jurisdictional regulations which restrict their locations and operations in the community. They create jobs and provide a place where tourists can stay without threatening locals’ privacy, culture, or economic security. They are therefore poised to better connect travelers and locals than short-term rentals. By becoming an integral destination within the community itself, tourists can feel immersed in local activity and culture without contributing to growing anti-tourism sentiments. Designing spaces in hotels in which residents and travelers both feel comfortable not only improves business-resiliency and the guest experience, but gives hotels a much needed edge against the short-term rental market.



Traditional Hotel User Definitions

Redefine the guest

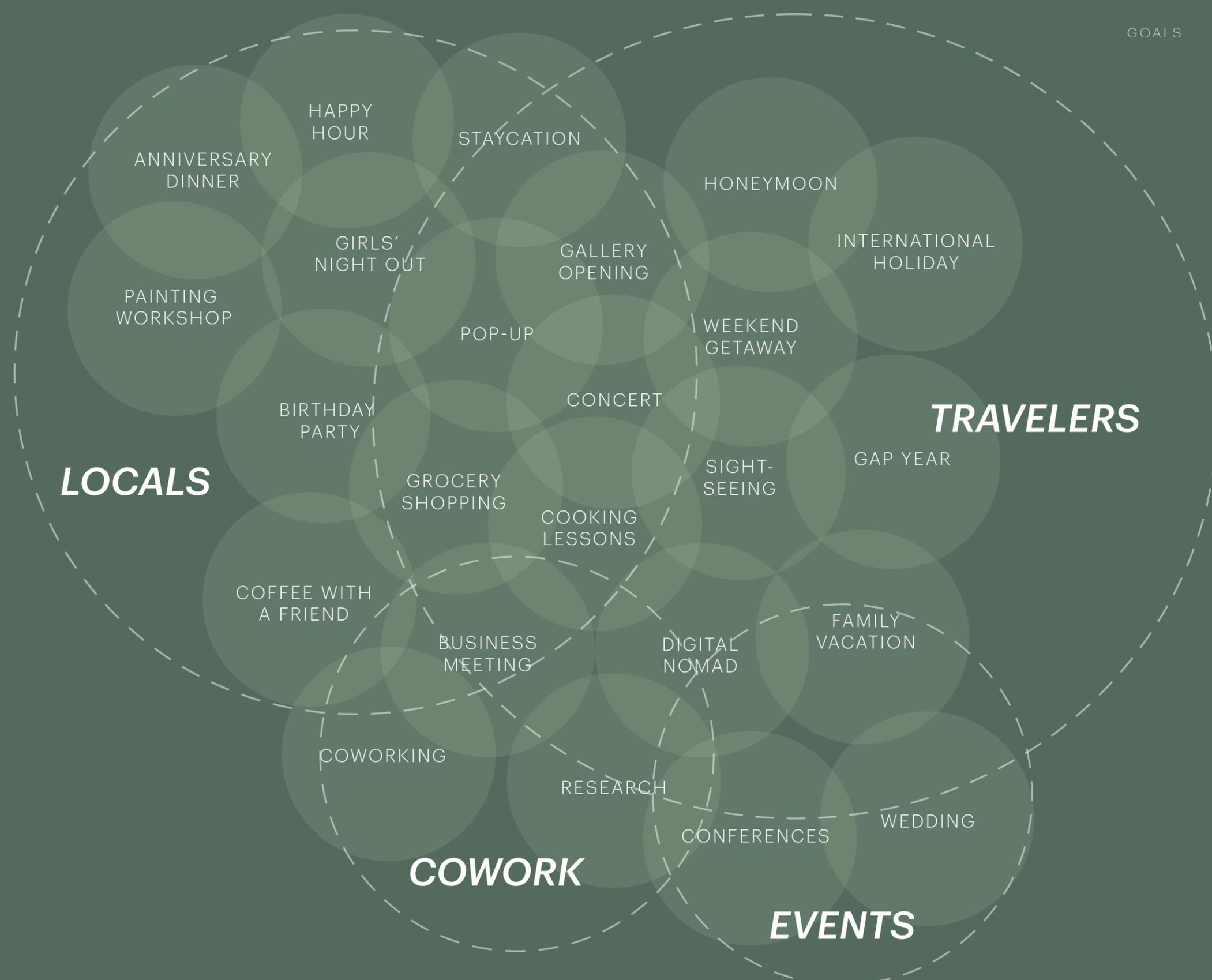
In order to diversify the users of a hotel, it is essential to redefine the word "guest". Guests should not be limited to the people who are renting a room for the night. Furthermore, guests should not be classified by who they are, but by what drives them to the hotel. This creates a better understanding of why they are coming, and what overlapping opportunities there are to engage guests with other programming and activities within the hotel.

guest

[gest] noun

a person who experiences the spaces and services that a hotel offers

It is paramount that each guest feels welcome, and their needs are fulfilled, regardless of whether or not they are holding a key card.



Traditional hotel operations looks at separate and distinct market segments, but the needs of these groups overlap. Finding these overlaps allows the hotel to distinguish itself among travelers and to leverage unique activities that draw locals so they can diversify their user base.

Internal Focus Groups

Our team held three focus groups of 3-5 people in June 2020 that included HKS managers, designers, advisors, and architects. The goal of each session was to glean the inherent knowledge that many of our experienced hospitality team members know, but don't always have the opportunity to share. This was achieved through brainstorming exercises specifically focused on the industry's recurring volatility.

In each session the teams began by responding to two questions: "Why is the hospitality industry vulnerable?" and "Why are communities unprepared?" The second exercise focused on brainstorming the ways that the industry has been specifically impacted by COVID-19.

Further Insights

The focus groups also helped to establish the framework for defining our strategies. Hotels are designed to deliver a specific experience to guests, which is informed by the way that people interact with and within the hotel. There are three interconnected conditions which impact the way that this delivery is designed. Every factor that affects the way a hotel is designed and operates falls along a spectrum of these three conditions.

Because they are interconnected, *changes in one of these conditions requires a change in the others* in order for a hotel to maintain a positive bottom line. Because hotels are designed to provide a **specific** experience, they often lack the operational and spatial flexibility to make these changes, leaving them vulnerable.

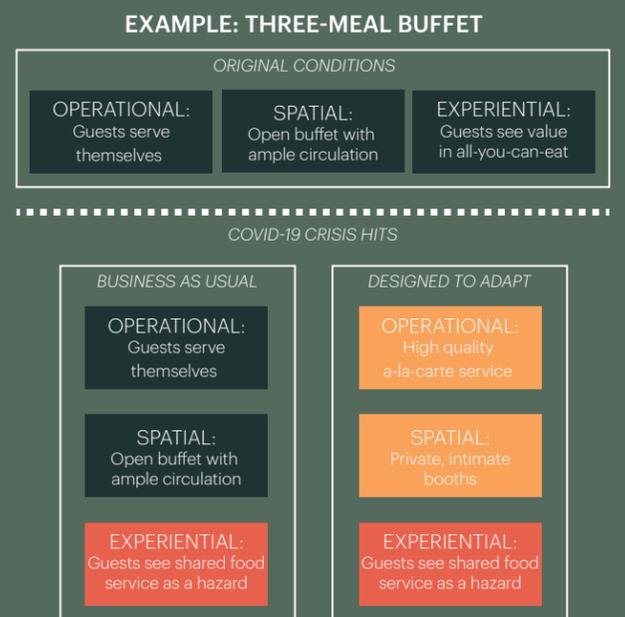
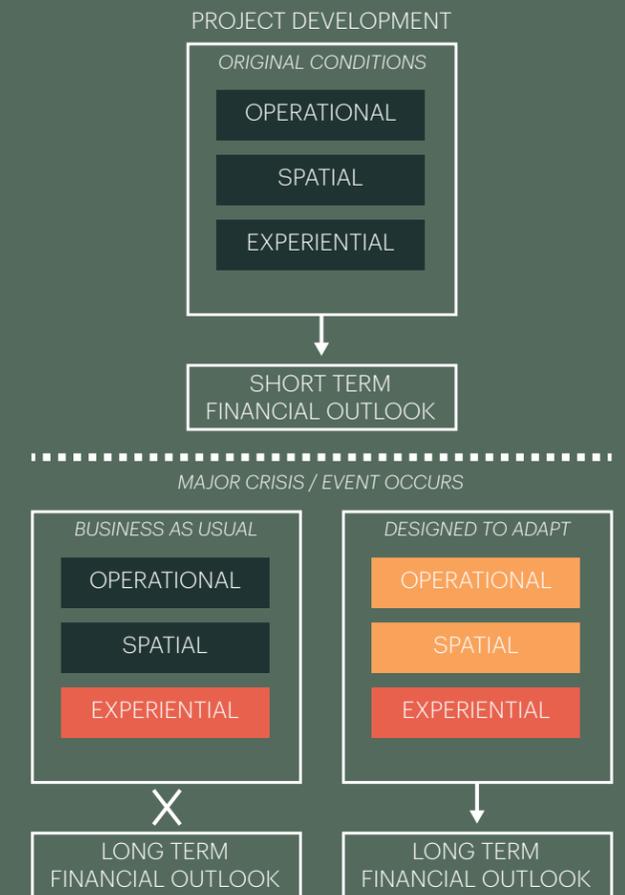
Factors closer to the experiential condition are the most difficult to predict and control, and the most likely to change during major emergencies and events. This means that hotels will need to find ways to anticipate these changes and design flexibility into their spatial and operational conditions.



Experiential: relating to how people interact with others and perceive the world around them

Spatial: relating to the physical form of the built environment

Operational: relating to how things function in order to fulfill their purpose



Participants

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Project Manager (Mexico City)
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KEY INSIGHTS

Travel is a choice.

Hotels are designed for limited use.

Hotels are designed for a limited outlook.

Hospitality relies on other travel industries.

Hotel development relies on government policy.

Disaster response is largely reactive.

Perception is as important as actual safety.

Subject Matter Expert Interviews

Our team held both internal and external subject matter expert interviews. Each of these conversations sought to understand industry innovation surrounding revenue and operations, focusing on questions around traditional hotel uses and how they could be re-imagined to be more effective or flexible.

Internal Interviews

In the internal set of interviews, our team spoke with three HKS Hospitality Advisory team members to understand how our scope of work could best benefit our clients and how it is relevant to current industry trends and how they were affected by the COVID-19 crisis. We sought to come away understanding how the pandemic has impacted the industry's drive for innovation, and what spaces in their buildings were limiting potential changes or hindering flexibility.

KEY INSIGHTS

The COVID-19 crisis has sparked a unique time for reflection and innovation within the industry.

People will go back to sharing things. Human behavior isn't going to permanently change.



Jennifer Dohrmann-Alpert
Vice President, Advisory Services

"Any hotelier would be remiss to not use this [COVID-19 crisis] as an opportunity to re-imagine. There hasn't been a whole lot of creativity in hotel spatial design for a long time... it's been pretty formulaic."



Ben Martin
Principal, Advisory Services

"I don't think that the sharing economy will be absent long term.... This has been an underlying trend for a while. COVID-19 has been an almighty bump in the road, but it's in our nature to be social and gather together. People are just waiting for the green light to meet together once more when it's safe to do so. The strengthening of social media platforms during the pandemic has been remarkable to watch, but these will never replace real human interaction."



Brian Sands
Principal, Advisory Services

"I think that the boutique hotels often times are the ones that do a better job of integrating themselves in with the local community, involving the local community... and they are the place that I think often times are where innovation starts. Independents in any industry tend to be a little bit more the innovators."



Kelly McGuire
Managing Principal, Hospitality for ZS

"It's tough to break out and think about segments differently or utilize the asset in more creative ways. But I think the pandemic is now going to make people more receptive to this because it's become a necessity."



Dave Roberts
Lecturer at Cornell University, The Hotel School

"At virtually any point in time, regardless of what's happening in the world, you see this latent demand for leisure travel... we saw this in the depths of 2009 and post 9/11, and you see it now... For example, across the industry if you look at demand by day-of-week, Saturdays are recovering a lot faster than Tuesdays. People want to travel, they just aren't taking many business trips just yet."



Stephani Robson
Senior Lecturer, Director of Undergraduate Studies at Cornell University, The Hotel School

"If we are creating [public] spaces anyway and we tweak them [to serve a community purpose], and it buys you more built area or some concessions... maybe it's a tax break because you're providing a service or maybe you're in partnership with some public entity... that can be monetized. You can demonstrate the [positive] financial implications of that selection."

External Interviews

The external series of interviews our team conducted were done following the synthesis of previous research and used as a gauge to understand how our conclusions aligned with industry trends and conditions. Our questions focused on diversification and various revenue opportunities within the industry.

KEY INSIGHTS

Maximize the services hotels already have on-site to provide additional revenue.

Innovations in technology will require thoughtful placement and priority on human service.

Hotels understate their existing role in the community. Partnerships can also lead to concessions and other benefits.



Brad Wellstead
Lecturer at Cornell University, The Hotel School

"Communities want to be together and to have ways to connect with each other more so than just by happenstance. Hotels are one of the few areas besides churches, libraries, and more public buildings that can offer that sort of resource at a different level."

There is no one-size-fits-all approach to improving a hotel's business resiliency.

The methods and strategies implemented in order to diversify the user base of a hotel will vary between each hotel property. However, there are three overarching goals that can be used as a framework: **connection**, **identity**, and **versatility**. These goals can enhance a project narrative and lend to opening the hotel's doors to a wider variety of opportunities. Project-specific attributes such as context, client ambitions, and market potential should be viewed as assets that can be leveraged to accomplish these goals. The differences between each project only help to create a more vibrant destination that can provide a unique experience for every single guest.

Connection

Hotels are uniquely positioned to be vital social and cultural anchors within their communities. In the past, hotels have stood as backdrops to classic novels and places of respite for both travelers and locals. Recent trends in the industry have contributed to a sense of gate-keeping and exclusivity that have limited hotels' ability to make these connections. By breaking down barriers and making spaces where all guests feel comfortable, there are opportunities for spontaneous and authentic interactions.

Not only do hotels offer a variety of public spaces which can serve community members at large as a place to convene, they also host a variety of basic services. Opening up these services to the neighborhood would give locals the ability to visit the hotel and pick up their laundry and a meal kit for that evening's dinner while meeting a friend for coffee. By designing all of a hotel's services to intersect, hotels can cross-sell ancillary revenue streams.

“The business of business is relationships; the business of life is human connections.”

—Robin Sharma

Identity

Identity encompasses qualities which make a hotel distinct and unique. The hotel's identity should resonate with its context and local culture. Partnering with local business and brands can also distinguish properties and deepen the relationship with the community and its culture. The hotel's identity should not just be based on the visual aesthetics of the destination's stereotypes, but should be rooted in a respectful understanding of its traditions and heritage.

A parallel aspect of identity is to ensure that the hotel generates a buzz about itself as a known local destination. Regular events and programming can also create pulls for locals by establishing the hotel as a dynamic place that can be revisited time and time again. Its design should serve to spark the curiosity of passerby and lay the foundation for the hotel to become an icon within the neighborhood.

“The market will dictate that to be successful, innovation must happen at the property level, with hotels designing amenities, experiences, and options that are unique to their location or region.”

— *Chris K Anderson*

Director, Cornell University School of Hotel Administration²¹

Versatility

Versatility is the immediate multi-functional use of a space.²² This form of flexibility goes beyond operable partitions and traditional notions of what makes a space adjustable. Versatility should not be about allowing for infinite possibilities, but is about designing-in deliberate, well-considered alternatives. Smart design decisions allow spaces to be programmed to fulfill different needs based on the time of day, season, or market condition. In addition, spaces which currently serve one distinct use or program should be re-envisioned to find synergistic uses that can plug into the typical configuration of the space.

Versatile design solutions can efficiently make more thoughtful use of traditional hotel spaces. This doesn't mean that spaces that are functioning well must be rethought entirely, but potential uses should be considered in a way that ensures the space can flex. Versatility allows hotel operators to experiment with programming and personalize spaces to fit guests' needs while retaining consistency and quality throughout the overall experience. Both first time guests and local regulars can be certain there will always be something new to discover.

“Change is the only constant in life. One's ability to adapt to those changes will determine your success in life.”
- *Benjamin Franklin*

Implementation

Each of the goals are achieved via design strategies falling within one of three categories: experiential, spatial and operational. These categories serve as the pillars of designing for resilience. **Experiential** strategies provide opportunities to enhance the guest’s stay, whether they’re a local dropping in or a traveler staying the week. **Spatial** strategies employ planning methods which elevate one of the three goals. **Operational** strategies relate to the day-to-day function of the hotel and complement the facilities management needs as well as the needs of a variety of users.

	CONNECTION	IDENTITY	VERSATILITY
EXPERIENTIAL	Understand ways the hotel can fill programmatic gaps in the community.	Offer unique programming that is attractive to travelers and locals alike.	Consider synergistic activities and programming that can cross-pollinate hotel guest types.
SPATIAL	Design circulation and public spaces to be friendly to all users.	Design iconic features that respond to local context.	Design hotel spaces to accommodate multiple functions.
OPERATIONAL	Find strategic overlaps between back-of-house services and community needs.	Create partnerships with local brands and businesses.	Give guests options for customization and build-in control for operators.



Designing with the local community in mind can give hotels a steadier revenue stream while minimizing the ups and downs of transient market segments. It can also give them a competitive edge against other accommodation typologies like short-term rentals and serviced apartments.

While this report doesn't provide the financial projections of each suggested move, many of the mentioned opportunities provide returns on investment that are not accounted for in typical success measures such as revenue per-available-room. The benefits of connecting with the community in which the hotel resides can vary, ranging from direct profit increases to varying concessions such as increased floor-to-area ratio or reduced parking counts.

Through clever design, many of these goals can even be achieved without a premium or initial cost. It is important for these goals to be considered in the first steps of the design process in order to maximize their impact.

The first step to improving hotel business resiliency is to ask:

What more can a hotel be?



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