



AHLA'S STATE OF THE HOTEL INDUSTRY 2021



January 21, 2021

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State of the Hotel Industry 2021

Executive Summary

The hotel industry experienced the most devastating year on record in 2020, resulting in historically low occupancy, massive job loss, and hotel closures across the country.

Hotels were one of the first industries affected by the pandemic after travel was forced to a virtual halt in early 2020, and it will be one of the last to recover.¹ The impact of COVID-19 on the travel industry so far has been nine times that of 9/11.²

In 2021, many challenges remain for the industry, including a resurgence of COVID-19 at the end of 2020, new strains of the coronavirus, and a slow vaccine rollout. Travel is not expected to return to 2019 levels until 2024.

Despite this, the industry is resilient, and hotels across the country are focused on creating an environment ready for guests when travel begins to return in 2021.

Leisure travel is expected to return first, with consumers optimistic about national distribution of a vaccine and their ability to travel again this year. At the same time, business travel—which comprises the largest source of hotel revenue—remains nearly nonexistent, though it is expected to begin its slow return in the second half of the year.

The following report outlines the forecasted state of the industry in 2021 and into the immediate future, examining the high-level economics of the recovery, the specific impact on and eventual return of business travel, and a deep dive into consumer travel sentiments.

Key findings include:

1. Hotels will add 200,000 direct hotel operations jobs in 2021 but will remain nearly 500,000 jobs below the industry's pre-pandemic employment level of 2.3 million employees.
2. Half of U.S. hotel rooms are projected to remain empty.
3. Business travel is forecasted to be down 85% compared to 2019 through April 2021, and then only begin ticking up slightly.
4. 56% of consumers say they expect to travel for leisure, roughly the same amount as in an average year.
5. Nearly half of consumers see vaccine distribution as key to travel.
6. When selecting a hotel, enhanced cleaning and hygiene practices rank as guests' number two priority, behind price.

Hotels support millions of jobs across the country and are central to getting our economy back on track. Prior to the pandemic, hotels were proud to support one in 25 American jobs—2.3 million direct hotel operations jobs and 8.3 million hotel-supported in total—and contribute \$660 billion to U.S. GDP.³ While a full recovery remains years off and further relief is critical, the hotel industry will begin to rebound starting in 2021.

Hotel Industry Outlook

The sharp and sustained drop in travel demand due to COVID-19 has taken an incredible toll on the hotel industry.

With travel demand continuing to lag normal levels, national and state projections for 2021 show a slow rebound for the industry in terms of hotel occupancy and revenue, employment, and state and local tax contributions that will begin to accelerate in 2022.

While the industry is expected to see better results this year compared to 2020, the projections for the next several years remain significantly below pre-pandemic levels before leading up to a full recovery in 2024.

1. Hotels are expected to add 200,000 jobs but remain well below 2019 levels.

The hotel industry’s greatest resource is its workforce, the members of which are the heart of hospitality. Yet in 2020, **more than 670,000 direct hotel industry operations jobs and nearly 4 million jobs in the broader hospitality industry were lost due to the pandemic.**⁴

As the industry begins the New Year, at least two in 10 hotel employees who were working in March 2020 are still not back on the job at all, while many more are not yet back full-time. Overall, the accommodations sector faces an 18.9% unemployment rate as of December 2020, according to the Bureau of Labor Statistics.⁵ This figure understates a portion of the problem as there are many workers previously employed in hotels that are exiting the industry and/or the workforce entirely. Oxford Economics projects that the direct hotel industry jobs unemployment figure will exceed 20% in 2021.⁶

In 2021, employment in the industry is only expected to grow by 200,000 jobs compared to 2020, resulting in a **net loss of 478,245 hotel employees from pre-pandemic levels.**⁷

Annual Employment Rates Breakdown of Top 10 States by Employment				
	2019	2020	2021	2022
United States	2,341,271	1,668,955	1,863,026	2,157,180
California	292,566	201,589	225,397	268,098
Nevada	191,479	148,040	169,197	179,017
Florida	206,667	143,738	167,107	189,090
Texas	151,481	121,894	131,734	144,419
New York	116,106	64,724	78,078	102,070
Georgia	57,288	44,955	47,802	53,487
Pennsylvania	65,571	43,904	49,415	59,025
Arizona	58,680	43,445	46,037	53,969
Colorado	52,929	39,737	45,064	49,686
Illinois	60,643	39,205	44,057	54,224

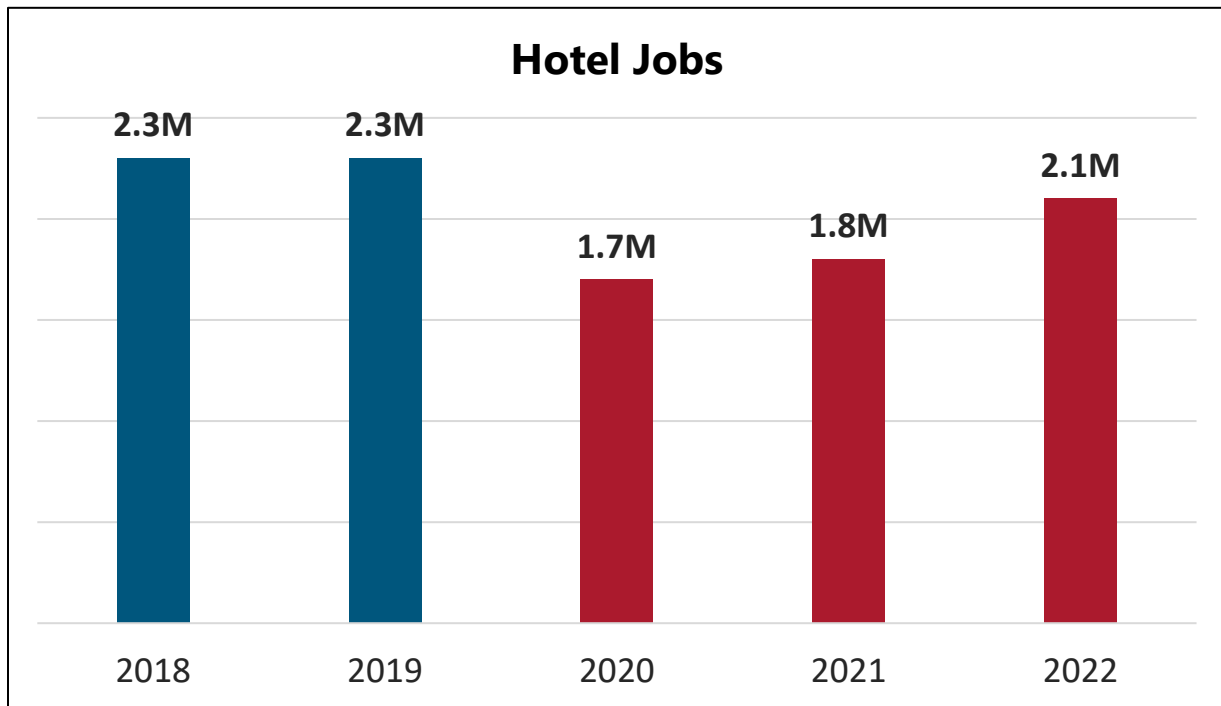
Source: Oxford Economics

2. Hotel employment is unlikely to reach pre-pandemic employment levels until at least 2023.

COVID-19 has forced hotels to reduce staff sizes and ask team members to take on additional roles. This has been especially difficult for urban hotels, which are major employers due to their larger average property size.

As urban and airport hotels have faced devastatingly low occupancy rates⁸, well below the national average, a significant rebound in hotel employment will not occur until group and business travel returns over the next several years.

In 2022, the number of jobs is projected to slightly increase compared to 2021, but the total direct hotel jobs will remain 184,092 fewer jobs when compared to 2019.⁹ Moreover, the industry is not expected to reach 2019 employment levels until at least 2023.¹⁰ **This has eliminated more than 10 years of job growth in the accommodations sector, according to BLS.¹¹**



Source: Oxford Economics

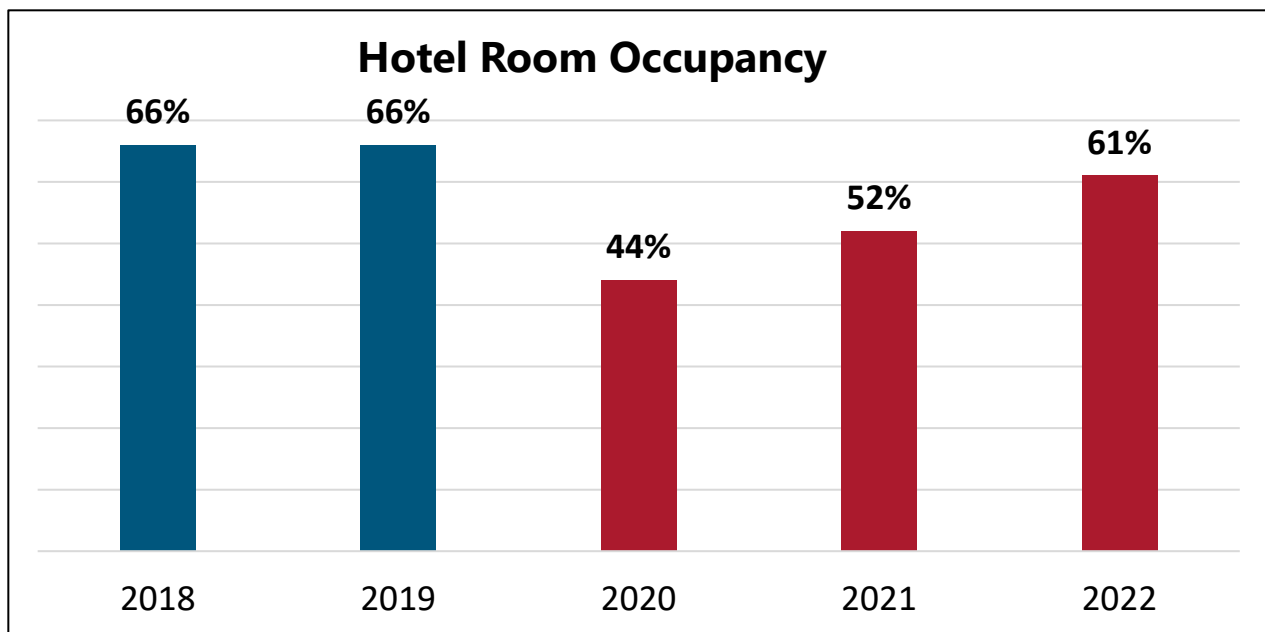
3. Hotel occupancy is projected to average just 52%, compared to 66% in 2019.

In 2019, the nation’s nearly 56,000 hotels experienced an average annual hotel occupancy of 66%,¹² selling 1.3 billion rooms.¹³

The onset of the COVID-19 pandemic brought hotel occupancy to a historic low of 24.5% in April 2020.¹⁴ Annual occupancy in the United States fell to roughly 44% for the full year.¹⁵ Additionally, the total number of rooms occupied fell by 458 million from 2019 figures.¹⁶

Hotel occupancy in the United States for 2021 is expected to average 52.5%, an increase of only 8.5% points from 2020.¹⁷ Room occupancy is also expected to increase by 208 million rooms.¹⁸ **While some full-service hotels begin breaking even at 50% occupancy,¹⁹ this does not account for mortgage debt service costs, leaving most hotels still well below their break-even point.**

Encouragingly, occupancy rates are projected to rebound more significantly in 2022, reaching 61.4%,²⁰ and the number of rooms sold is expected to reach 1.23 billion, nearing 2019 levels.²¹

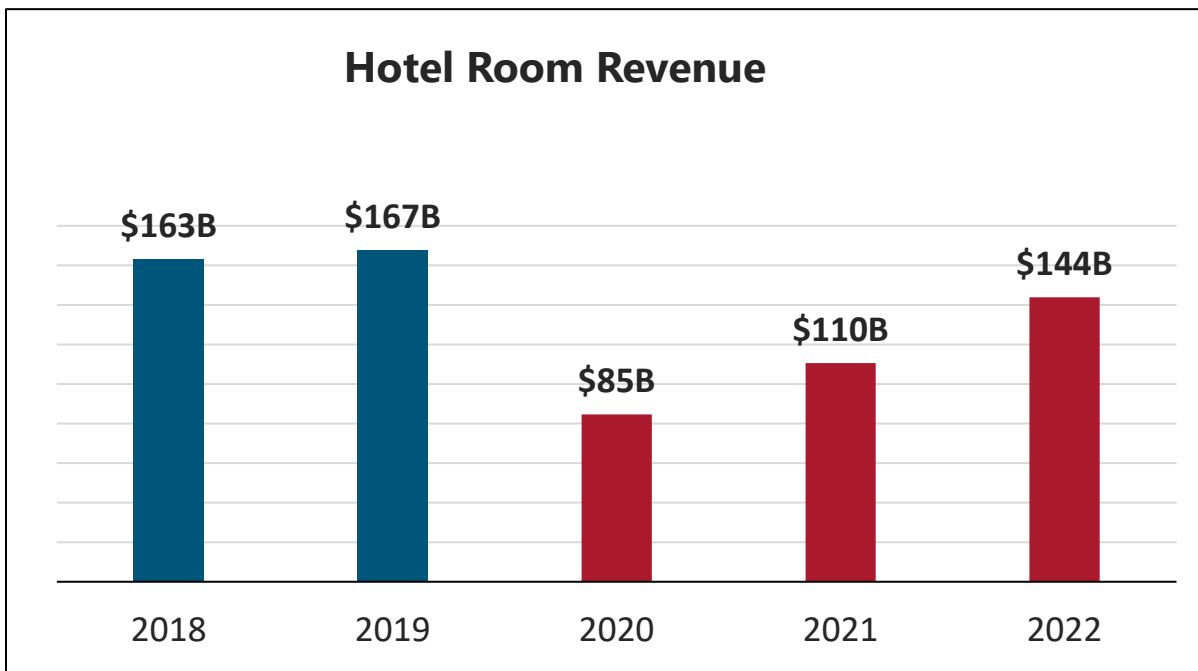


Source: Oxford Economics

4. Hotel room revenue is anticipated to reach just 65% of the 2019 total in 2021.

Prior to the pandemic, the hotel industry's 5.3 million guest rooms²² generated \$168 billion in annual room revenue, not including the additional tens of billions generated by meeting rooms and other ancillary revenue sources.²³ **In 2020, hotel room revenue fell by nearly 50%²⁴ across the U.S. to just \$84.6 billion.²⁵**

Room revenue is anticipated to increase by only \$25.9 billion this year, still 34% below 2019 levels.²⁶ In 2022, room revenue is projected to rebound a bit further, hitting an estimated \$144 billion, but still well below 2019 numbers.²⁷



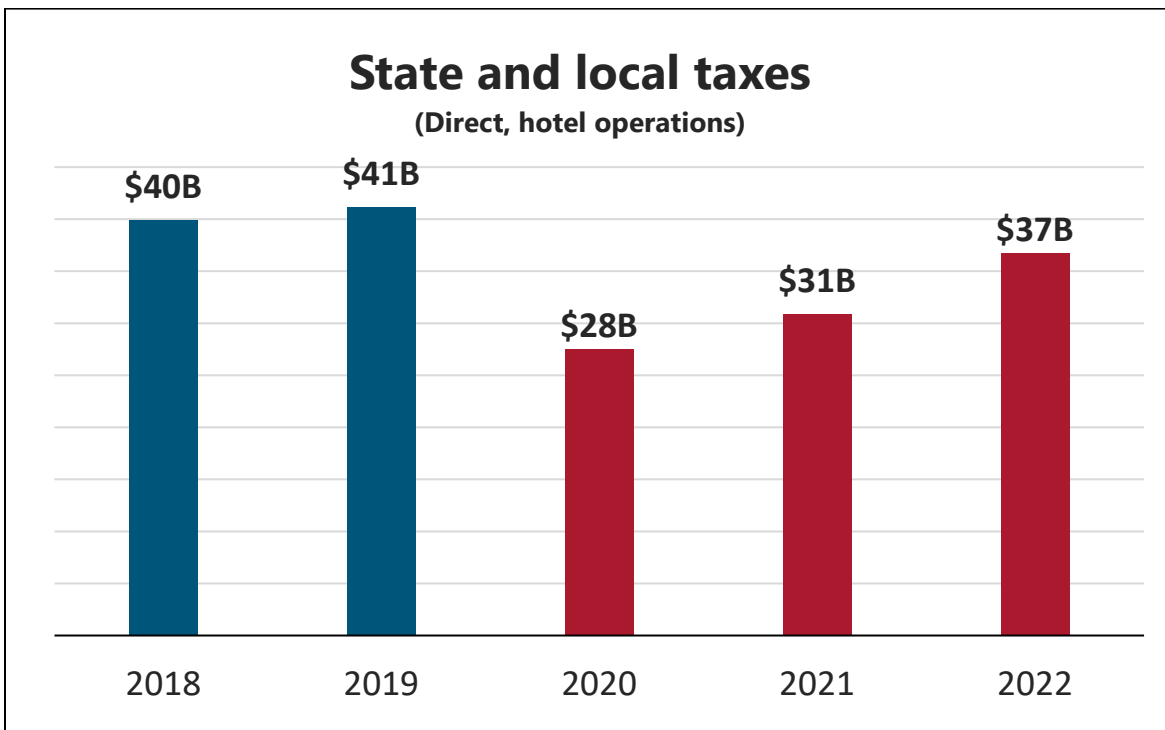
Source: Oxford Economics

5. Direct state and local tax revenue generated from hotels fell by one-third in 2020 and will not rebound until at least 2023.

Hotels are integral contributors to communities, cities and states across the country and support tens of billions of dollars in tax revenue at the state and local level. In 2019, direct state and local tax revenue, including hotel-specific occupancy taxes, sales taxes, property taxes and others, from hotels in the United States reached nearly \$41.1 billion.²⁸

COVID-19 and the resulting decline in travel has had led to significant declines in state and local tax revenue for 2020 and beyond. **Direct state and local tax revenue generated from hotels fell by approximately \$13 billion to \$27.5 billion in 2020.**²⁹ The pandemic has been especially devastating for urban markets, resulting in massive hotel job losses and dramatic reductions in hotel-generated tax revenues, exacerbating budget issues for struggling state and local economies.

In 2021, state and local tax revenue generated by hotels is expected to increase by only \$3 billion to reach \$30.9 billion nationwide, which is still a 25% decline when compared to 2019 levels.³⁰ In 2022, this will increase to an estimated \$37 billion.³¹



Source: Oxford Economics

Business Travel Outlook

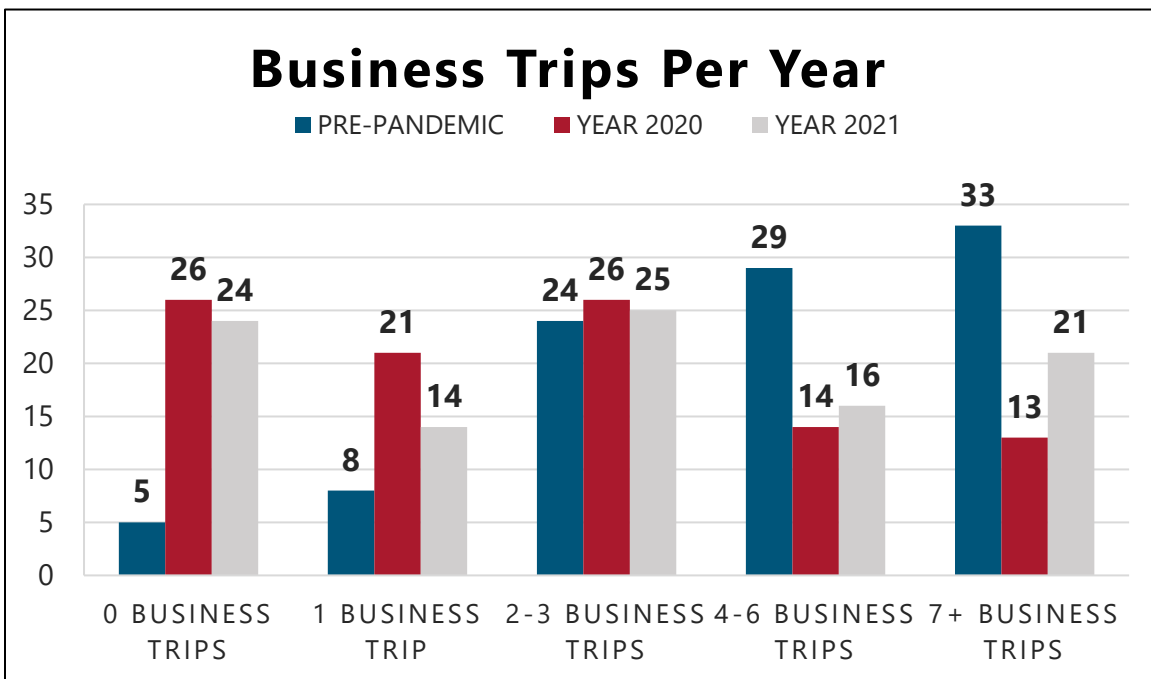
Corporate transient business and broad demand for groups and meetings remain a serious concern in 2021. While leisure bookings provided a bit of a cushion for hotels over the 2020 summer season, business travel—which comprises the largest source of hotel revenue—essentially ceased and remains nearly non-existent. Business and group travel are not expected to begin their slow return until a COVID-19 vaccine is widely available in the second half of the year.

The recovery of the travel industry is anticipated to take place in three phases: leisure travel, small and medium events, and group and business travel. **While recovery will begin in 2021, full recovery is not expected until 2024.**

1. Business travelers are driving the return to leisure travel.

While business travel itself will remain below 2019 levels, business travelers express greater comfort in traveling for any reason compared to adults overall, and they are more likely to say they will travel more in 2021.

In a January 2021 survey of frequent business travelers, 42% of respondents said they are already comfortable staying in a hotel, while 52% say their comfort staying in a hotel is connected to vaccination.³² Among frequent business travelers, 62% expect to travel more for leisure and 51% expect to travel more for business compared to last year.³³



Source: Morning Consult Survey
Commissioned by AHLA

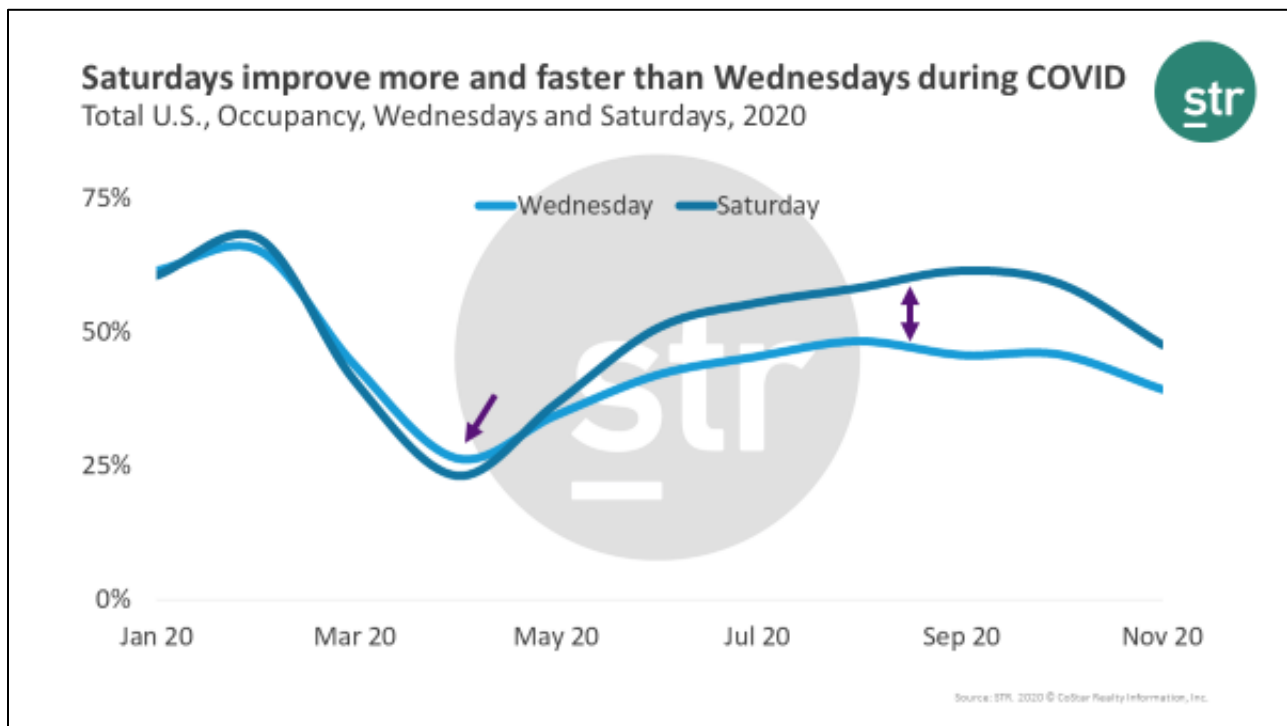
Prior to the pandemic, 13% of respondents took between zero to one business trips per year, another 24% took two to three trips per year, 29% took four to six trips per year, and 33% took seven or more trips annually.³⁴ In 2020 those numbers dropped dramatically with 26% saying they took zero business trips and 73% stating they took three or fewer trips for work the entire year.³⁵

Business travelers still anticipate traveling significantly less for work in 2021 compared to normal years. Twenty-four percent (24%) expect to take zero trips for work, 14% expect one trip, 25% expect two to three, 16% expect four to six and 21% anticipate seven or more trips for work.

2. The first phase of recovery has been almost completely domestic leisure travel.

At the peak of the pandemic’s impact on hotels in April 2020,³⁶ RevPAR (revenue per available room) dropped an unprecedented 80% compared to the prior year, and hotel performance has plateaued in the -50% RevPAR range at the end of 2020.³⁷ This slight uptick in hotel occupancy from the record-lows of April was driven by a moderate level of essential travel and leisure travel. At the end of 2020, a seasonal slowdown was not as stark as previous years as the traditional business and group segment travel was already on hold.

This reliance on leisure travel, and the absence of business travel, is clear when examining the days of the week when travelers are staying at hotels. Prior to COVID, hotels saw similar occupancy on Wednesdays and Saturdays. Broadly, leisure travelers tend to stay at hotels more on the weekends, and business travelers tend to stay more during the week. During lockdown, when travel and hotel stays were limited to essential workers only, Wednesday occupancy outpaced Saturday occupancy. However, since late May when the initial phase of recovery began, Saturdays have recovered by a larger margin and at a faster pace than Wednesdays, showing that leisure demand has recovered much faster than business travel. This also shows the lack of any significant traditional business and group travel.

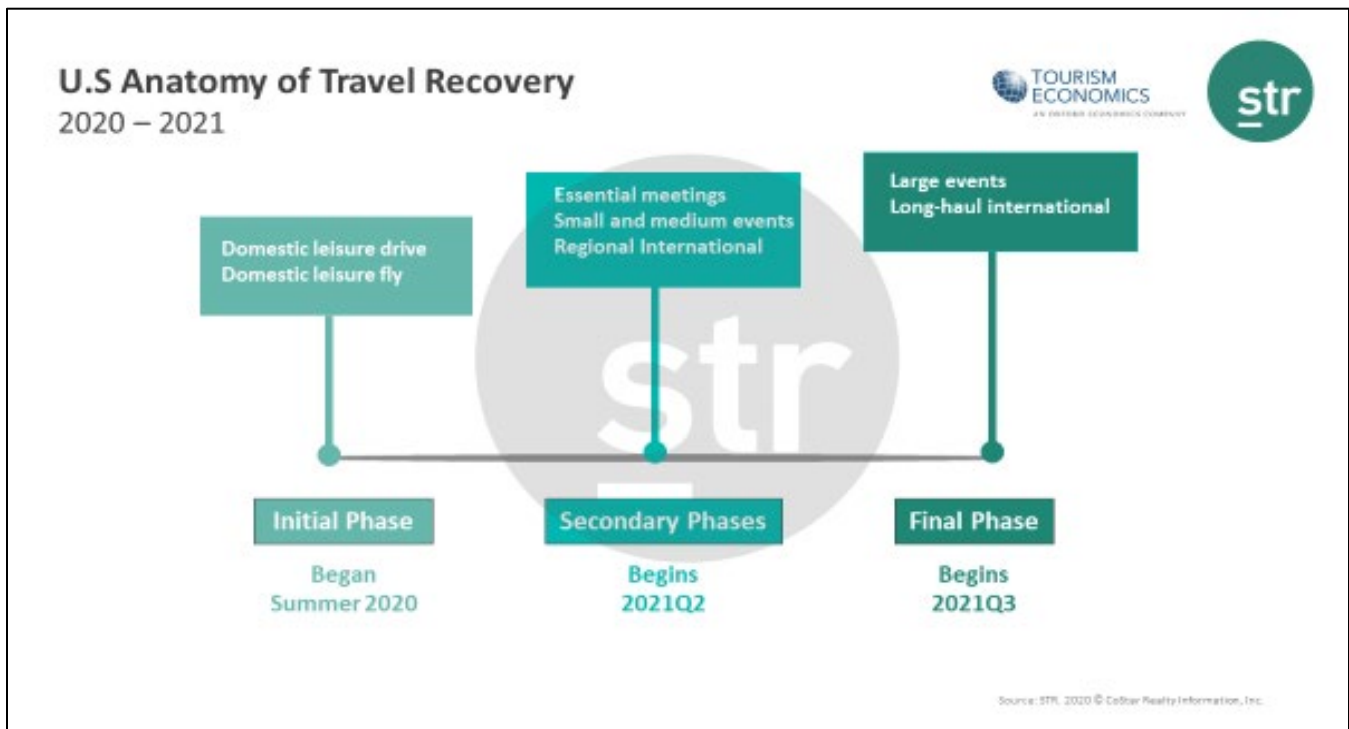


3. The second phase of recovery is forecasted to resume in Q2 2021 with small and medium events.

Business travel is forecasted to grow slightly in Q2 2021, assuming more widespread vaccine distribution, as essential meetings and small and medium events are held, and regional international travel begin to resume. Large shifts in business travel are not projected until a vaccine is widely available, and warm weather has returned.

Group and meetings related travel surpassed 6 million travelers per month in January-February 2020, but only reached 1 million in August-October.³⁸ **Group demand is forecasted to be down by 85% compared to 2019 levels through April 2021, and then increase slightly to -75% in May 2021.**³⁹ Large group and meeting-related travel face a long road to recovery as travelers take time to become comfortable with these types of events again.

It is clear from business travel data that most business travel management programs are planning on utilizing fewer hotels in 2021 compared to prior years.⁴⁰



4. The third phase of recovery is expected to slowly begin to resume in Q3 2021 with group and business travel.

Group travel is expected to start its return in Q3 2021 after a widespread increase in vaccine distribution and testing. These efforts will jump-start a sustained recovery, leading to the critical return of group travel and international demand. **By the fourth quarter in 2021, group demand is expected to be 23% down from fourth quarter 2019 levels.**⁴¹

However, business demand is most likely to only return to pre-pandemic levels once individuals feel safe returning to the office. At that point, travel will resume in stages depending on the method of travel, reason for travel, and industry sector. Hoteliers cannot control their properties' physical location or market industry mix, but there are elements contributing to business travel recovery that they can impact.

Client and other sales-driving meetings will likely be the first business travel to return as face-to-face meetings with customers are a critical element of the industry.⁴²

Industry conferences, trade shows, and other high-volume events will likely be the last to return, pending an end to restrictions on gathering sizes, as well as some degree of economic recovery. However, there will likely be pent-up demand to return to conferences once it is safe to do so.

Among those frequent business travelers who are currently employed, 29% expect to attend their first business conference in the first half of 2021, 36% in the second half of the year, and 20% in more than a year from now.⁴³

5. Despite modest improvements in 2021, business travel revenue is ultimately not expected to return to 2019 levels until 2024.

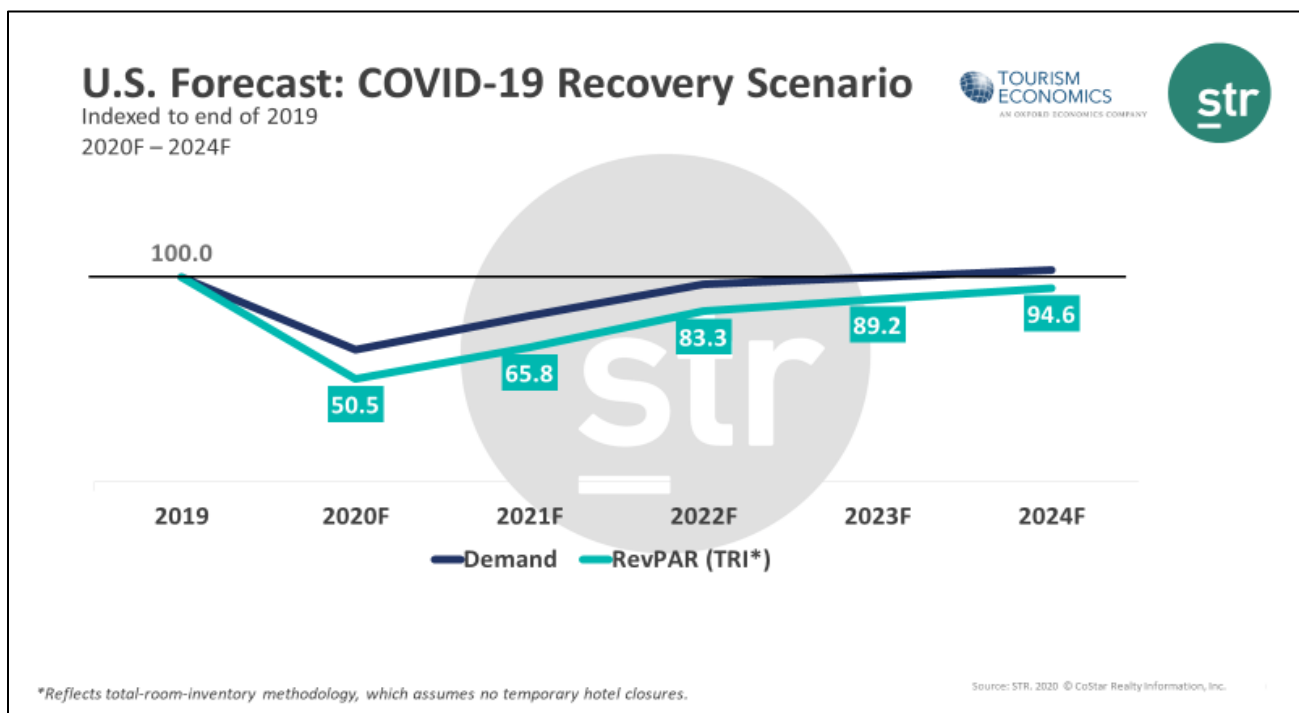
With continued restrictions and consumer unease, demand for business travel is not projected to return to 2019 levels until 2023. The third quarter in 2023 is expected to be the first quarter in which business travel demand is above the corresponding quarter in 2019, with room rate recovery lagging behind demand.⁴⁴

Employers will play an important role in helping to revive business travel. In a January 2021 national survey, nearly nine in 10 business travelers (87%) said their employer had put at least some restrictions on employee travel:

- 37% said their employer has completely halted all business travel;
- 34% said their employer has reduced business travel for all employees;
- 16% said their employer has reduced business travel for some employees; while
- 13% said business travel is continuing at the same rate.⁴⁵

Among business travelers whose employer has halted or reduced business travel, 21% expect it to resume to pre-pandemic levels in the first half of 2021, 26% in Q3, 16% in Q4, and 29% sometime after 2021.⁴⁶ Another 7% do not expect business travel to ever resume to pre-pandemic levels.⁴⁷

Room revenue is projected to take 15 quarters to recover, which is Q1 2024. By comparison, after the last recession it took nine quarters for revenue to recover. Lower-tier hotels and those in coastal, mountain, and other outdoors areas are expected to outperform the market overall.



Consumer Travel Outlook

Heading into 2021, consumers are optimistic about travel, with 56% of Americans stating they are likely to travel for leisure or vacation in 2021.⁴⁸

Before the pandemic, 58% of Americans said they stayed in a hotel at least one night a year for leisure, and 21% reported staying in a hotel at least one night a year for work.⁴⁹

Since the onset of the pandemic, consumer travel has dropped significantly: just 21% report that they have traveled for vacation or leisure, and only 28% say they have stayed in a hotel. Even so, consumers say they are optimistic about traveling more for both leisure and work in the year ahead.

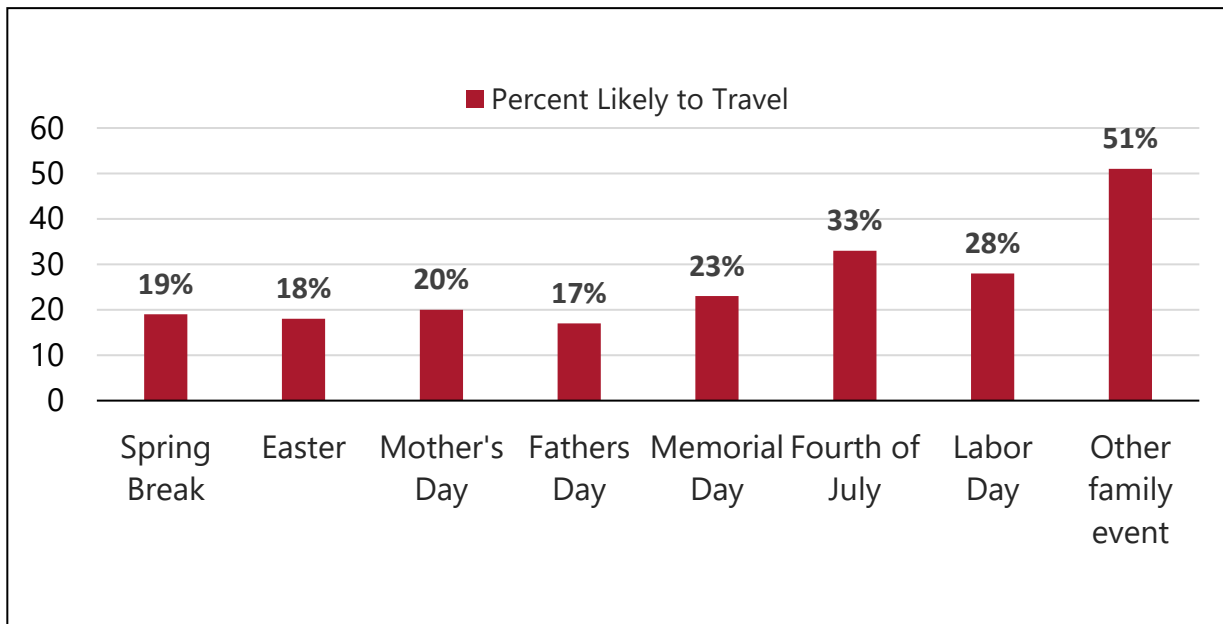
1. Consumers are looking forward to traveling in 2021 and are planning vacations.

After nearly a year of self-distancing measures, consumers are looking forward to traveling in 2021 and have begun planning their trips for the upcoming holidays. **Compared to last year, 36% of Americans expect to travel more for leisure in 2021, while 23% expect to travel less and 42% about the same.**⁵⁰

Leisure travel demand is projected to begin increasing in Q2-Q3 of 2021. One in five Americans (19%) expect their next hotel stay to be between January and April, with another 24% expecting it sometime between May and August.⁵¹

2. Consumers say their desire to connect with family or friends drives travel plans in 2021.

In the year ahead, Americans say they are most likely to travel for a family event such as a wedding or family reunion (51% likely to travel), while many are likely to travel over summer holidays, led by the Fourth of July (33%) and Labor Day (28%).

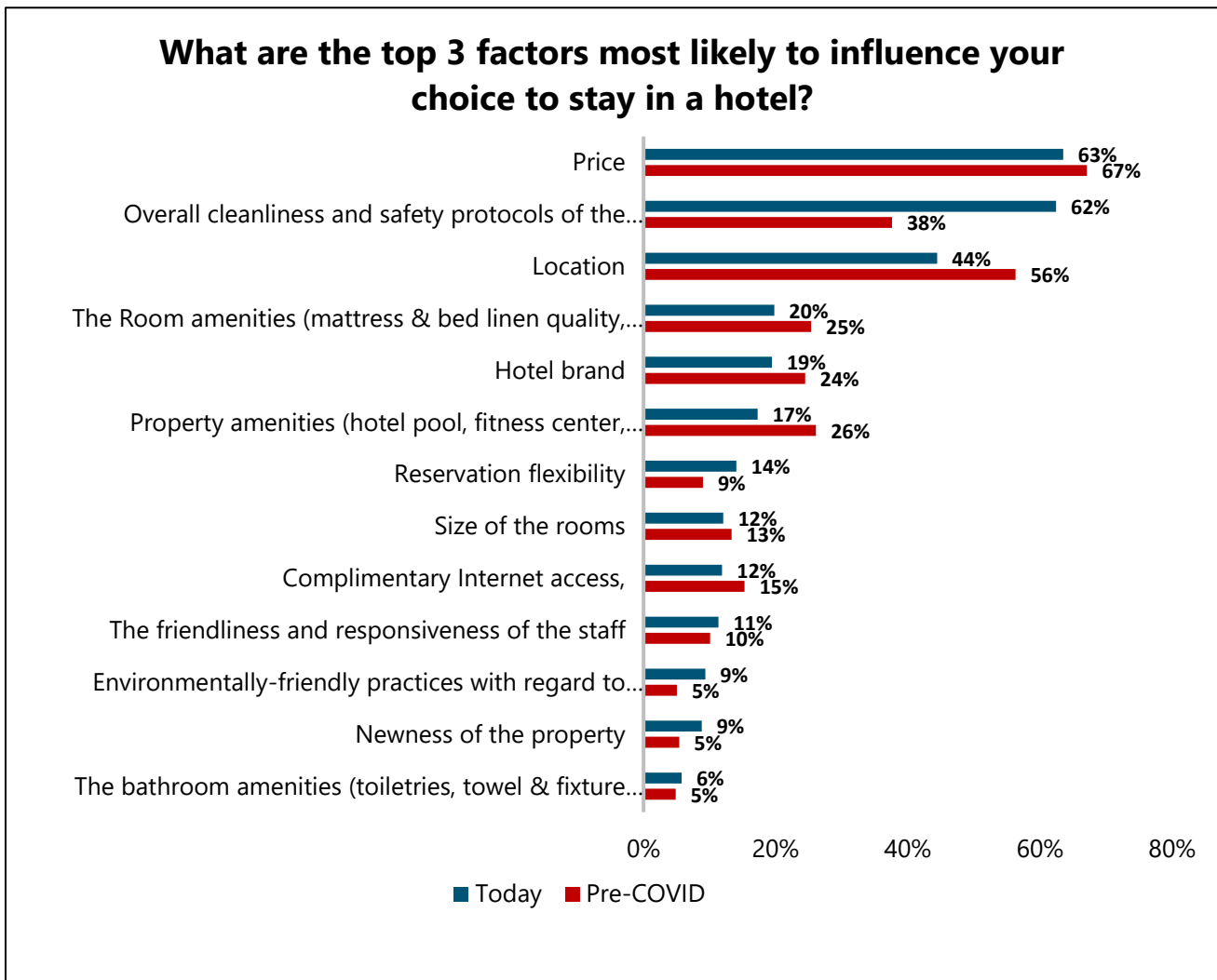


2. Wide distribution of COVID-19 vaccines will increase consumer confidence and help restore travel demand.

Leisure travel is expected to rebound in the second half of 2021 as vaccine distribution increases across the country.

While 34% of Americans say they are comfortable staying in a hotel right now, nearly half (48%) say their comfort is tied to vaccination in some way:

- 20% will feel comfortable staying in a hotel again when a majority of Americans have received a COVID-19 vaccine;
- 11% will feel comfortable when COVID-19 vaccines are available to the general public; and
- 17% will feel comfortable when they are personally vaccinated.⁵²



Source: Ecolab Consumer Safety Poll

Hotel Safety Protocol Outlook

Cleanliness and consumer safety have always been at the core of the hotel industry. At the onset of the pandemic, the hotel industry acted quickly to enhance already rigorous cleaning and safety protocols to ensure the safety of employees and guests.

AHLA launched Safe Stay, an initiative focused on enhanced cleaning measures and safety guidelines that help the industry meet and exceed the new health and safety challenges created during the pandemic.

Through the Safe Stay initiative, hotels are responding to travelers' concerns and are working to reassure travelers that hotels remain among the safest places for business, leisure, events, and employment. Yet, with a resurgence of the virus toward the end of 2020, travelers continue to have concerns about their safety, and many remain hesitant to travel.

1. While cleanliness has always ranked among the top factors when choosing a hotel, it has risen to the top in the wake of COVID-19.

With 62% of consumers placing overall cleanliness in their top three factors when choosing a hotel, consumers are continuing to prioritize safety when traveling.⁵³ This is up 24 percentage points over pre-COVID preferences and shows the importance cleanliness and safety protocols will continue to play in economic recovery both now and beyond the pandemic.

Further, 53% of consumers say that enhanced cleaning regimens will make them feel more comfortable staying at a hotel.⁵⁴

2. Potential guests want to hear from hotels about their enhanced cleaning and hygiene practices.

In a December 2020 survey of Americans who stayed in a hotel at least once in 2019, more than half said that enhanced cleaning regimens will make them feel more comfortable staying in a hotel.⁵⁵ Further, an August 2020 national survey of frequent travelers found that 81% of travelers felt more comfortable staying at hotels with "Safe Stay" cleaning and safety protocols implemented.⁵⁶

Guests also feel more comfortable when properties communicate these enhanced cleaning practices. Nearly seven out of 10 travelers report wanting to hear directly from hotels what measures properties are taking to ensure safety.⁵⁷



Source: Ecolab Consumer Safety Poll

When asked what steps hotels can take to make you more comfortable staying in a hotel, the most common responses included:

- Enhanced cleaning regimens (53%);
- Staff and guests wearing face masks (52% and 50%, respectively);
- Accessibility of hand sanitizing gel or wipes throughout the hotel (49%); and
- Implementing physical distancing protocols (41%).⁵⁸



Source: Ecolab Consumer Safety Poll

As part of Safe Stay, the industry released the Safe Stay Guest Checklist for guests on how to travel safely while also creating a standardized safety experience nationwide. The checklist includes requirements such as the use of face coverings in all indoor public spaces and the practice of social distancing in all common areas.

When it comes to business and event travel, virtually all planners expect a clean and sanitized environment. Additionally, 39% also want venues to add daily temperature checks, and 34% want on-site medical personnel included as well.⁵⁹

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Report Methodology

AHLA's *State of the Hotel Industry 2021* report was produced using publicly and privately available data and polling from national and industry partners, including:

- Exclusive data from *STR. 2020* ©CoStar Realty Information, Inc.
- Exclusive data from Oxford Economics
- Exclusive data from Cvent
- National surveys of adults and business travelers commissioned by AHLA and conducted by Morning Consult
- National survey of adults commissioned by Ecolab and AHLA

The consumer poll was conducted by Morning Consult between January 7-9, 2020 among a national sample of 2,200 adults. The interviews were conducted online, and the data were weighted to approximate a target sample of adults based on age, gender, educational attainment, race, and region. Results from the full survey have a margin of error of plus or minus 2%.

The business traveler poll was conducted by Morning Consult between January 7-12, 2021 among a national sample of 400 adults who traveled five or more nights for business in 2019. The interviews were conducted online, and the data were weighted to approximate a target sample of adults based on age, gender, educational attainment, race, and region. Results from the full survey have a margin of error of plus or minus 5%.

The consumer safety poll was conducted by Ecolab on December 10, 2020 among a national sample of 556 adults who stayed in a hotel at least once in 2019 and are the sole or joint decision maker for travel in their household. The interviews were conducted online, and the data were weighted to approximate a target sample of adults based on age, gender, educational attainment, race, and region.

For questions related to report methodology, please contact media@ahla.com.

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