

Horwath HTL

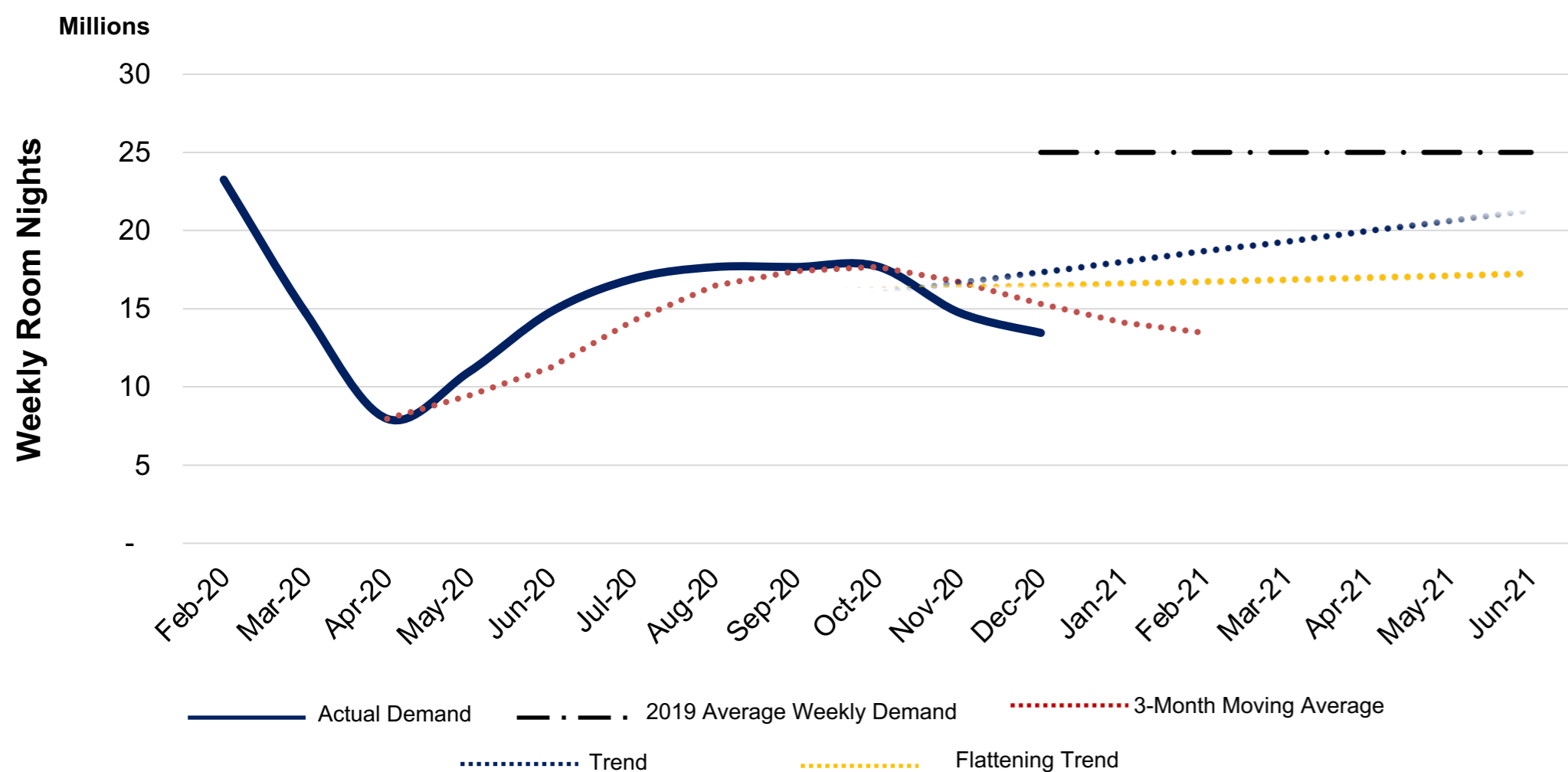
Hotel, Tourism and Leisure

MARKET REPORT

US Lodging Monthly Market Overview

DECEMBER 2020

U.S. Lodging Demand Recovery Trend

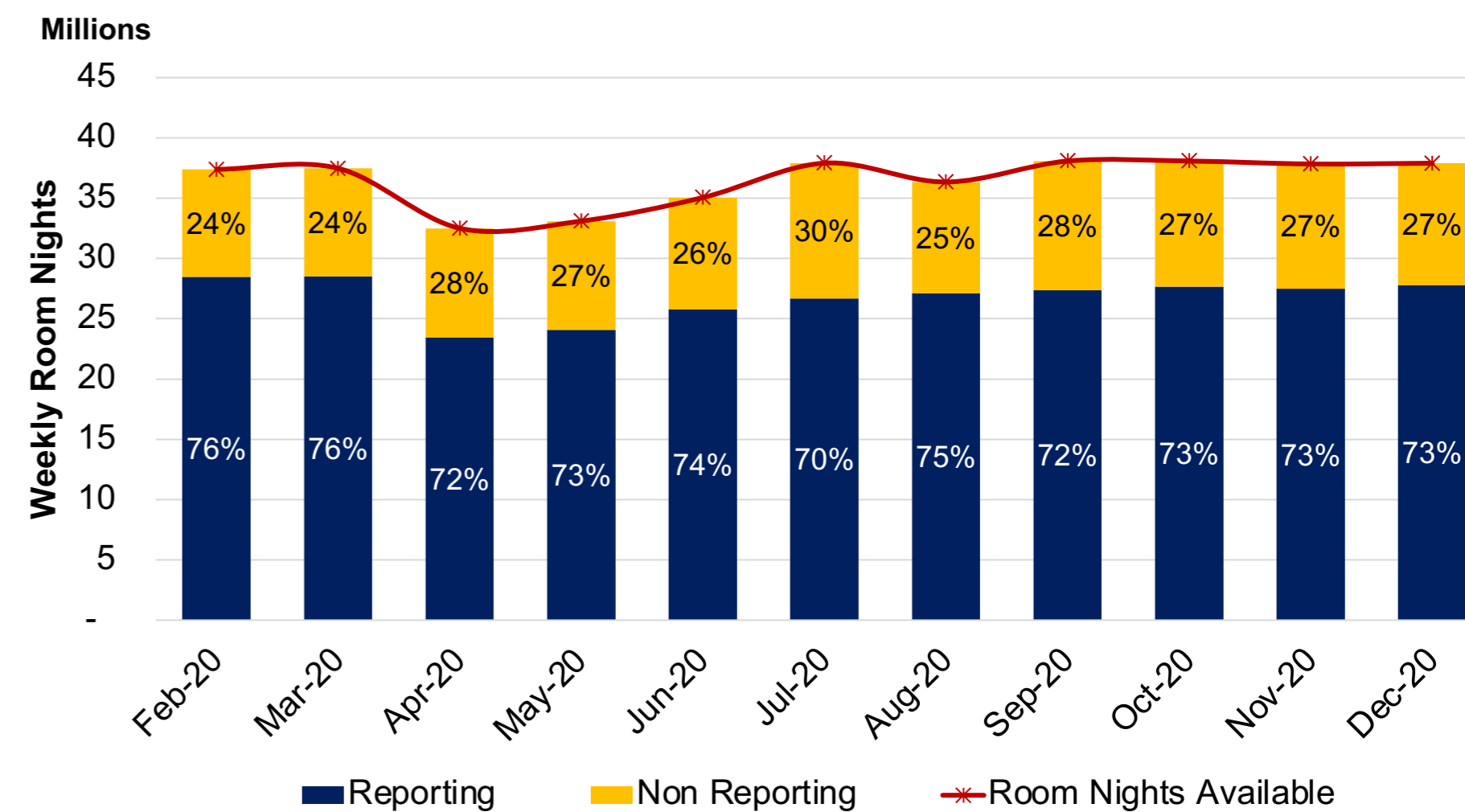


54%
Portion of 2019 average weekly demand recovered in December

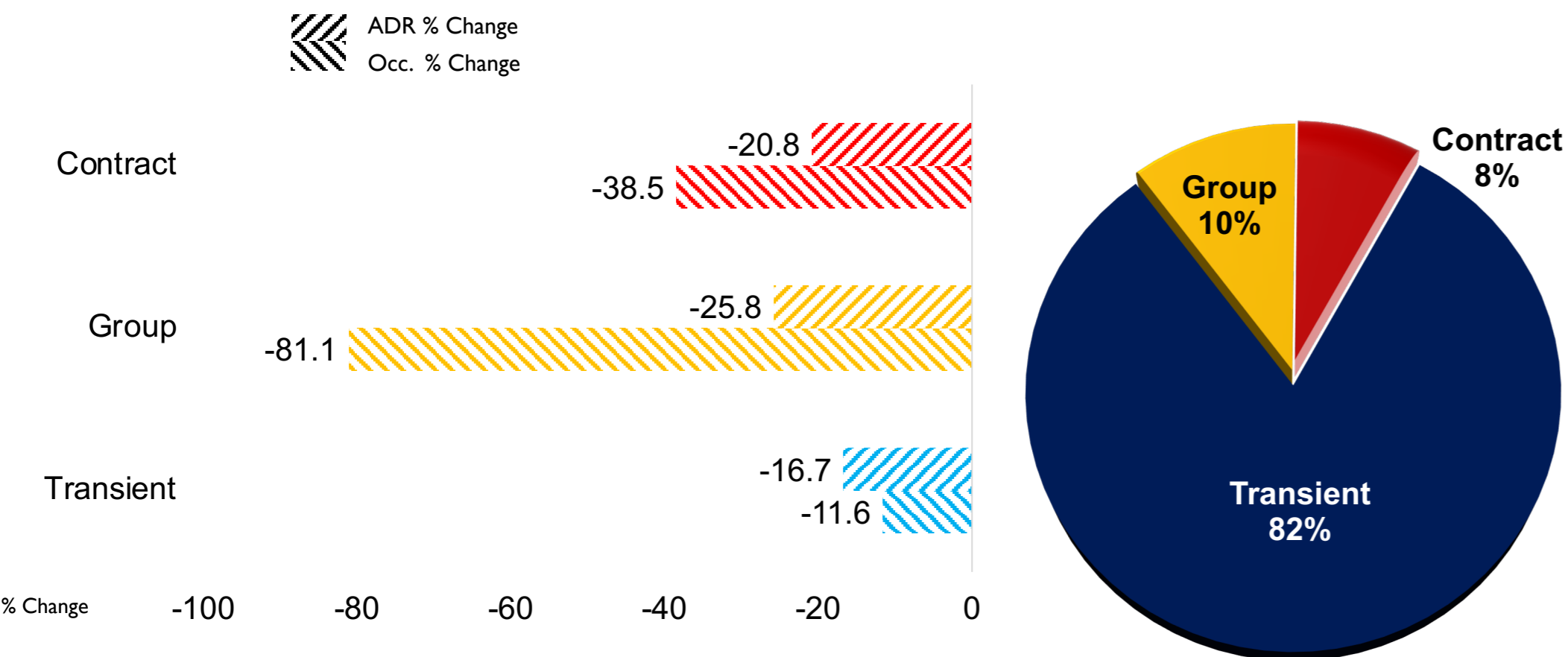
66%
YE 2019 Occupancy

42%
Estimated 2020 Occupancy

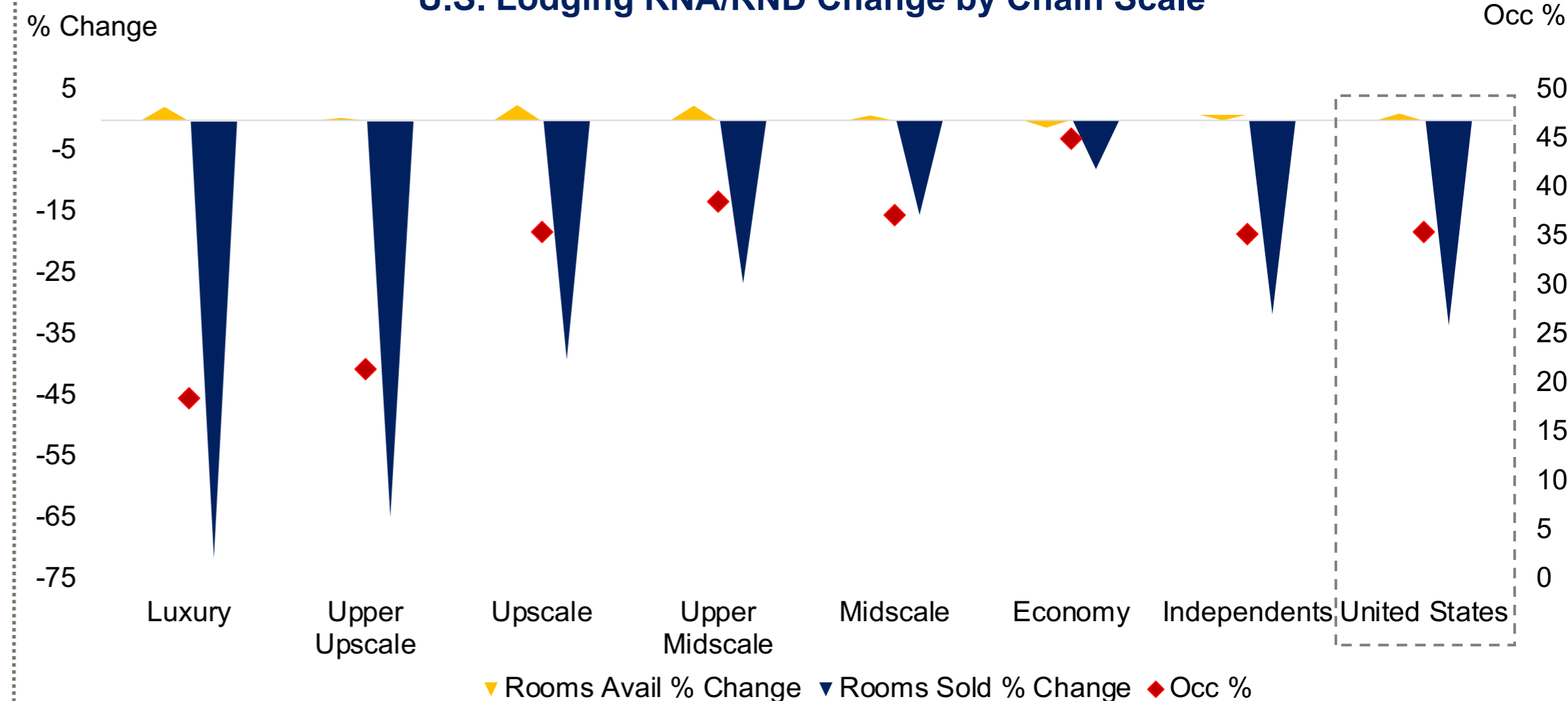
U.S. Lodging Supply Change and Reporting Participation



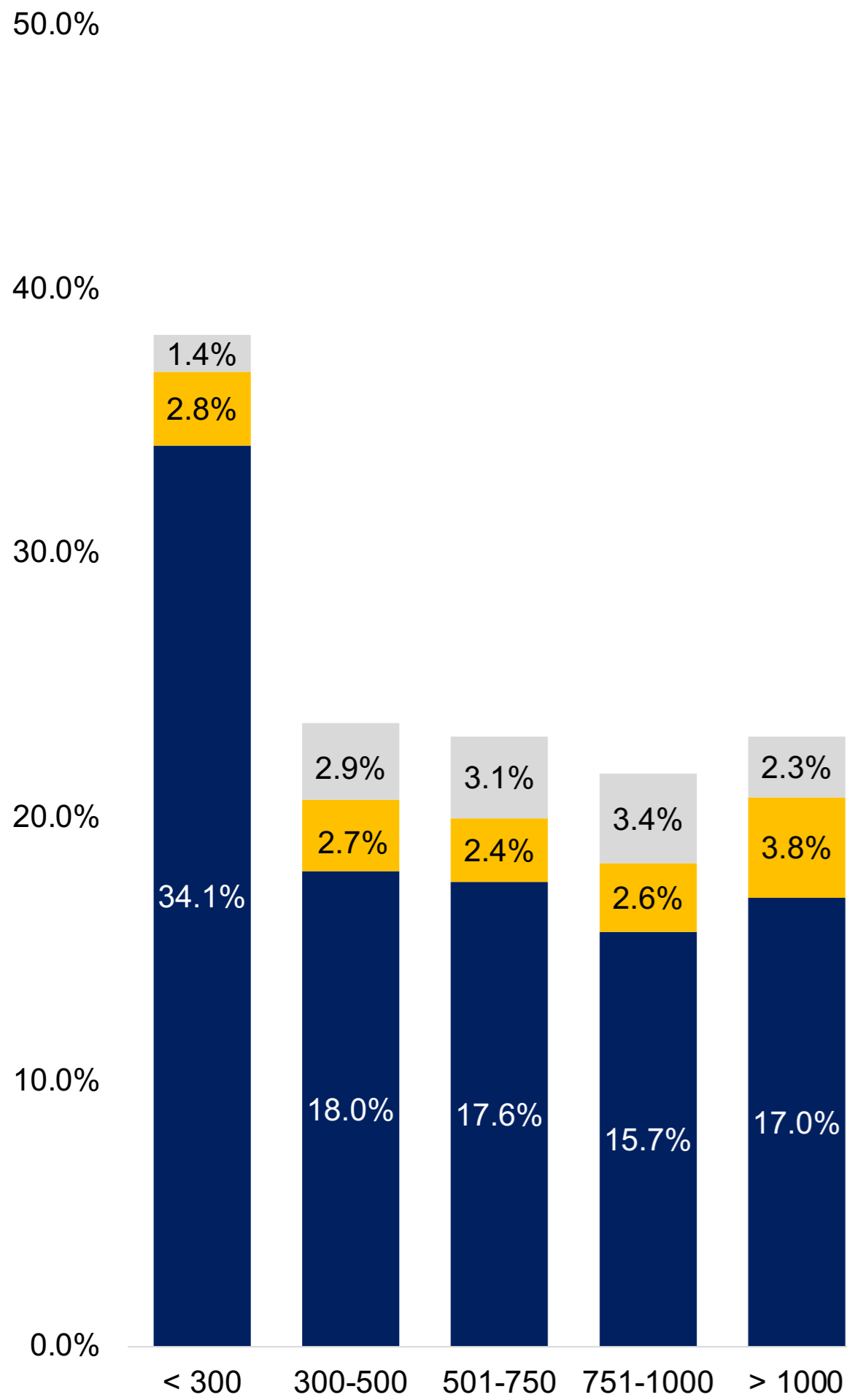
U.S. Lodging Market Mix/Change - December



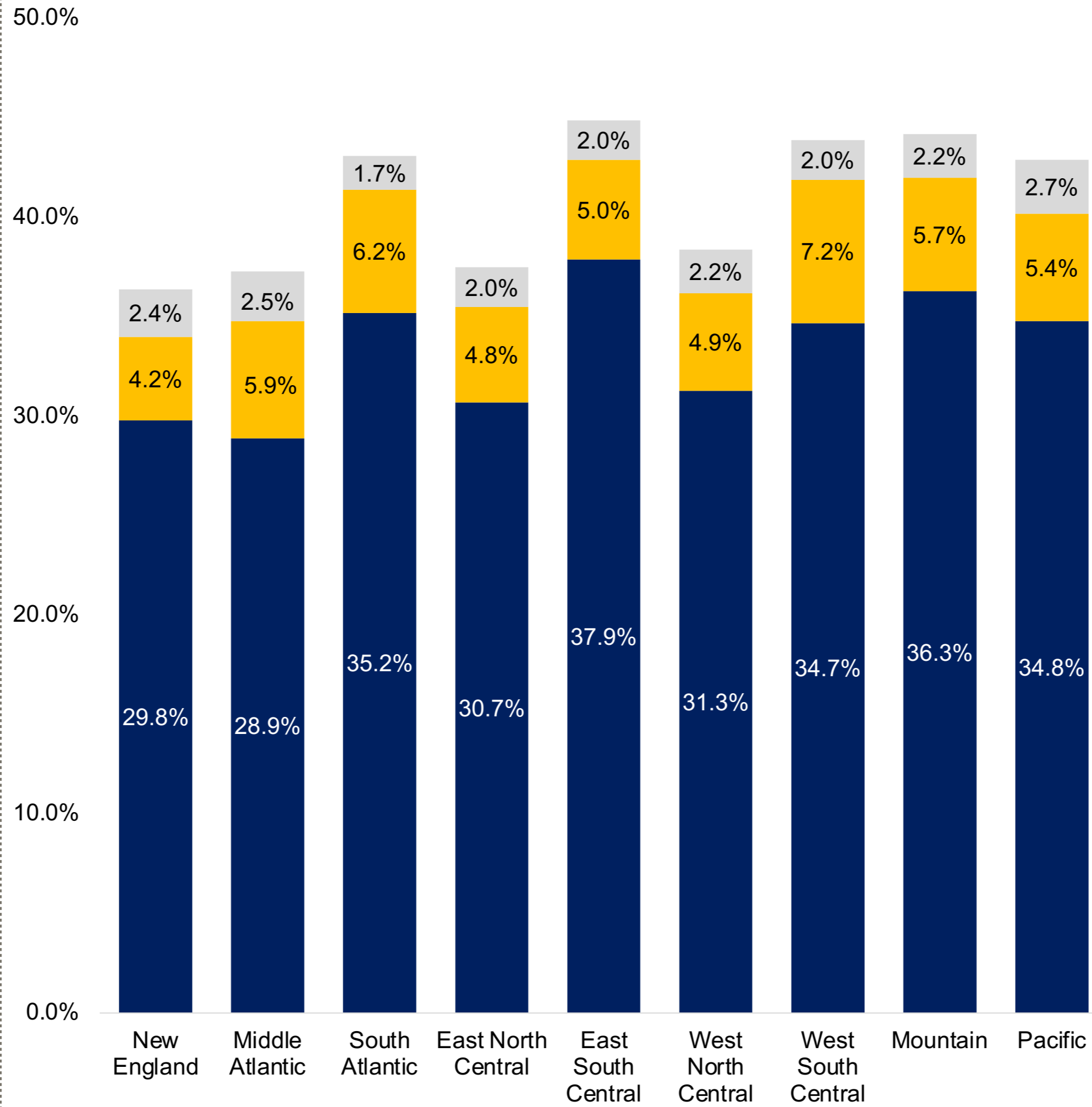
U.S. Lodging RNA/RND Change by Chain Scale



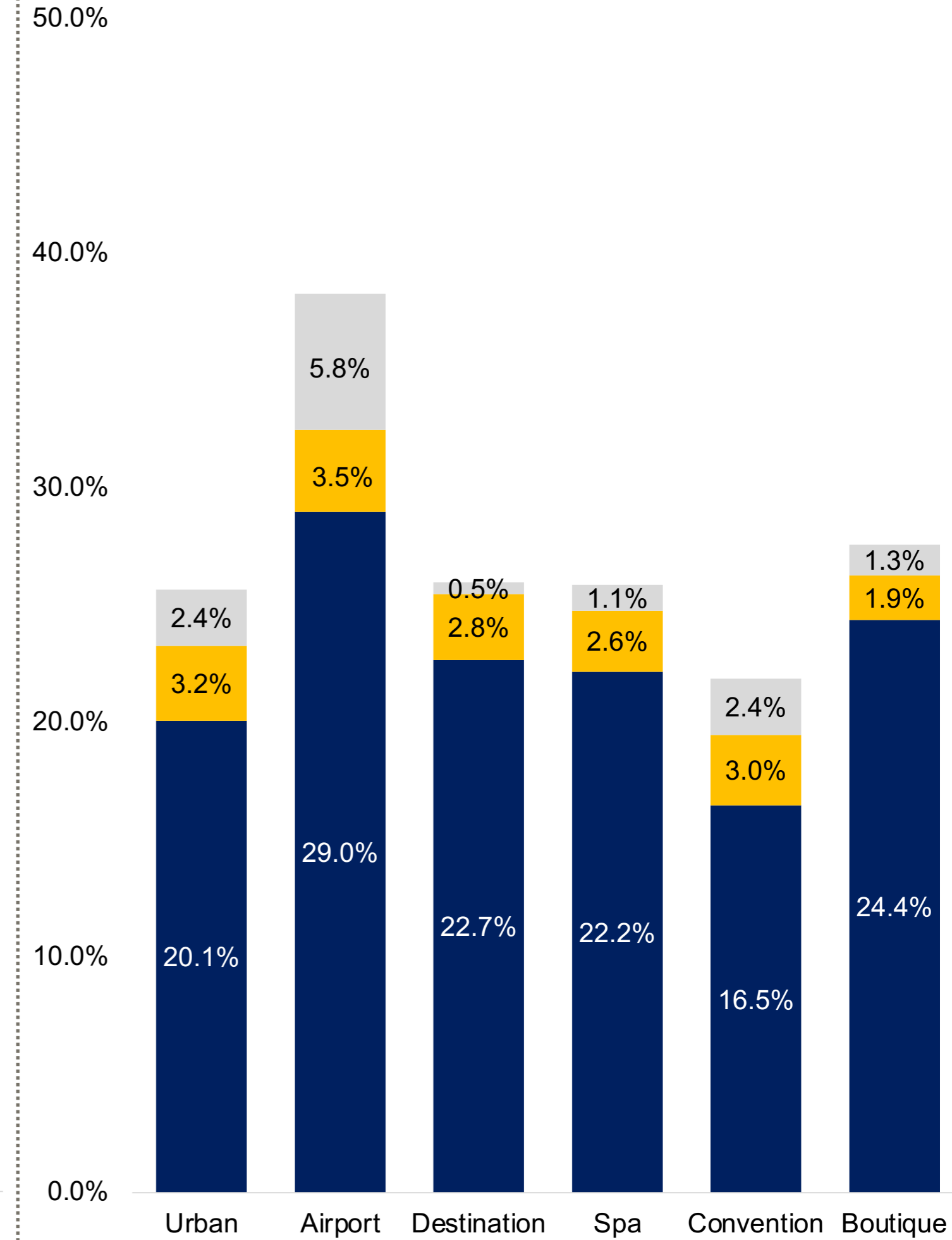
Monthly Occupancy by Size



Monthly Occupancy by Region

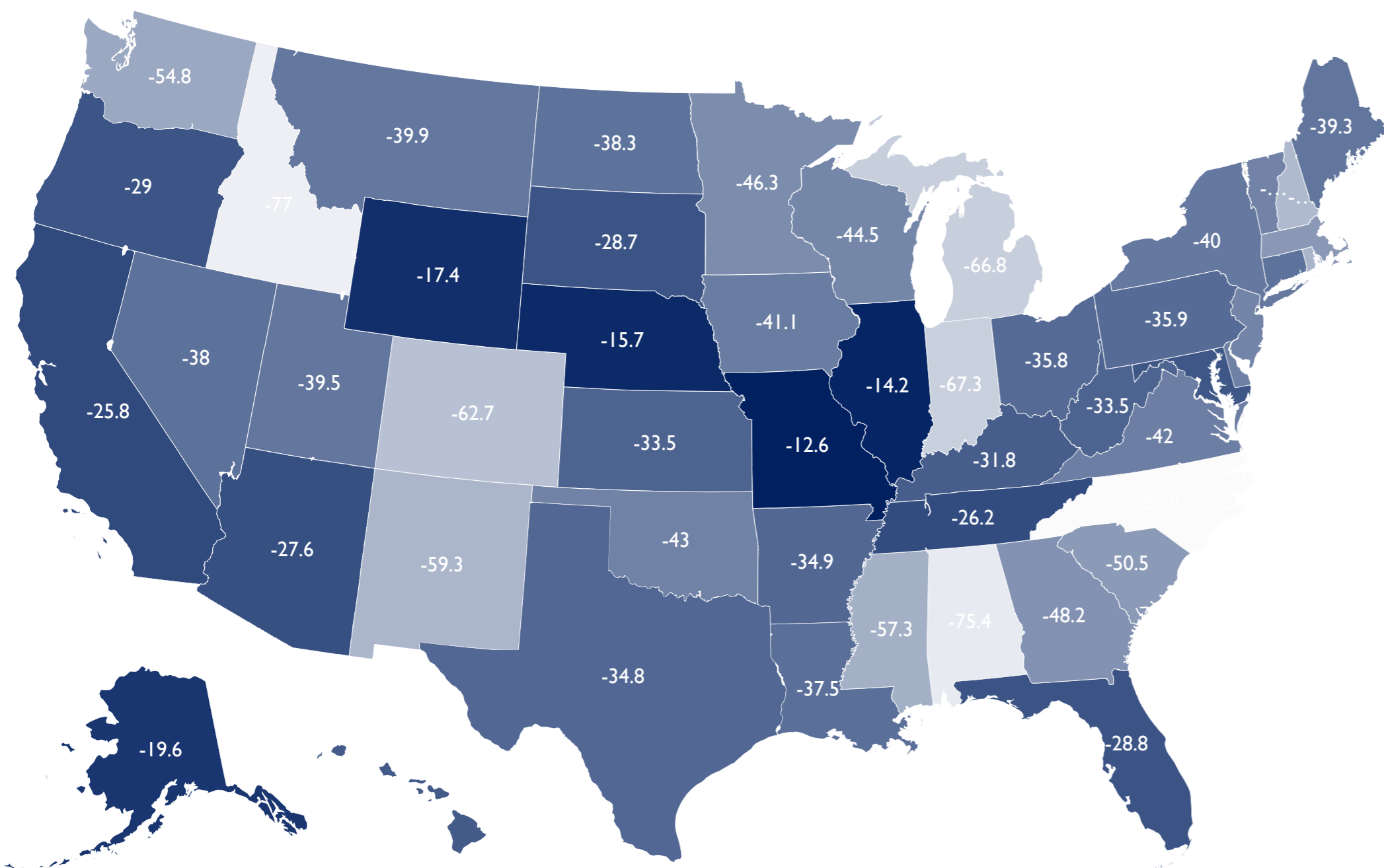


Monthly Occupancy by Selected Type

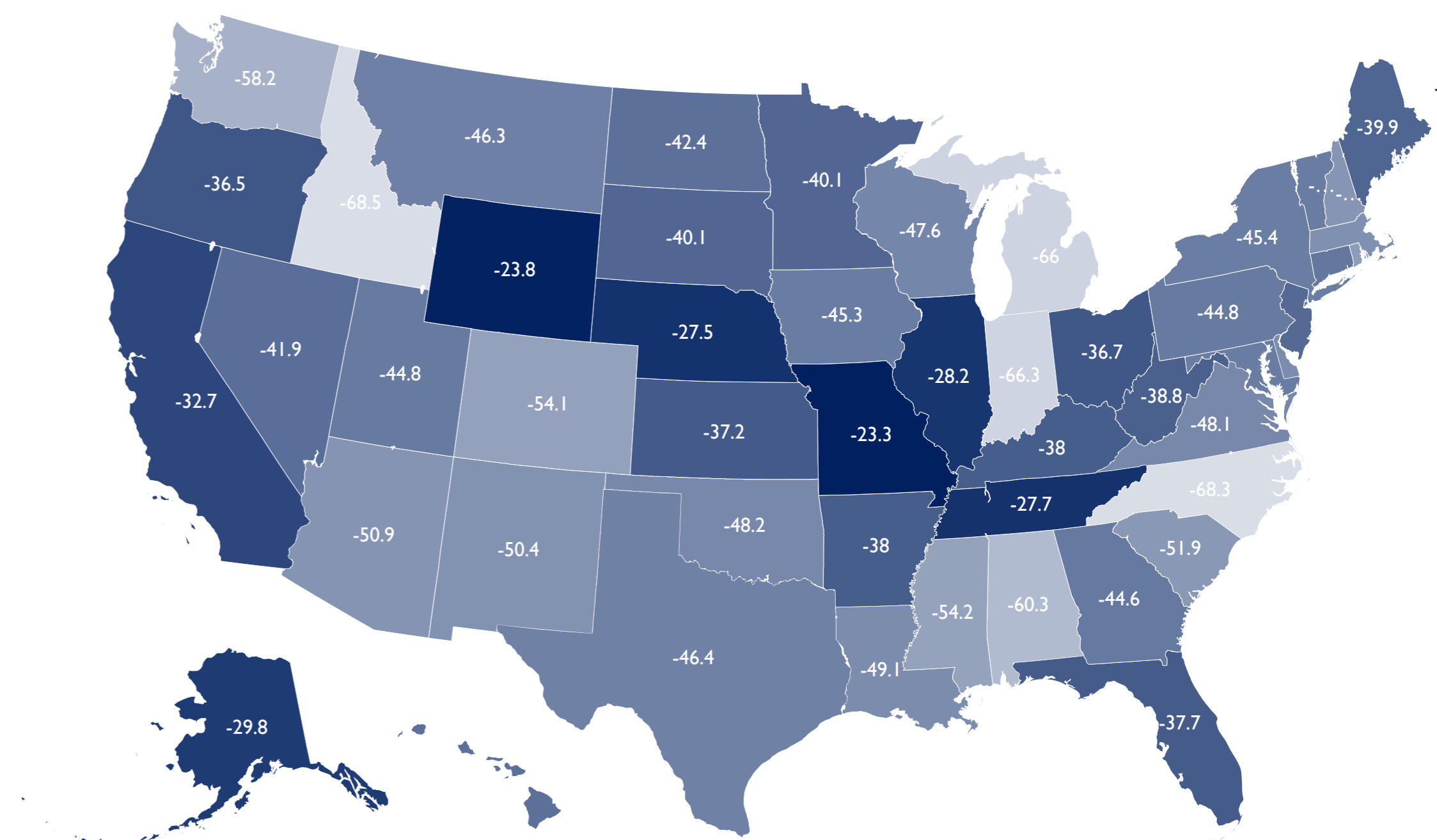


■ Transient ■ Group ■ Contract

Monthly RevPAR % Change by State

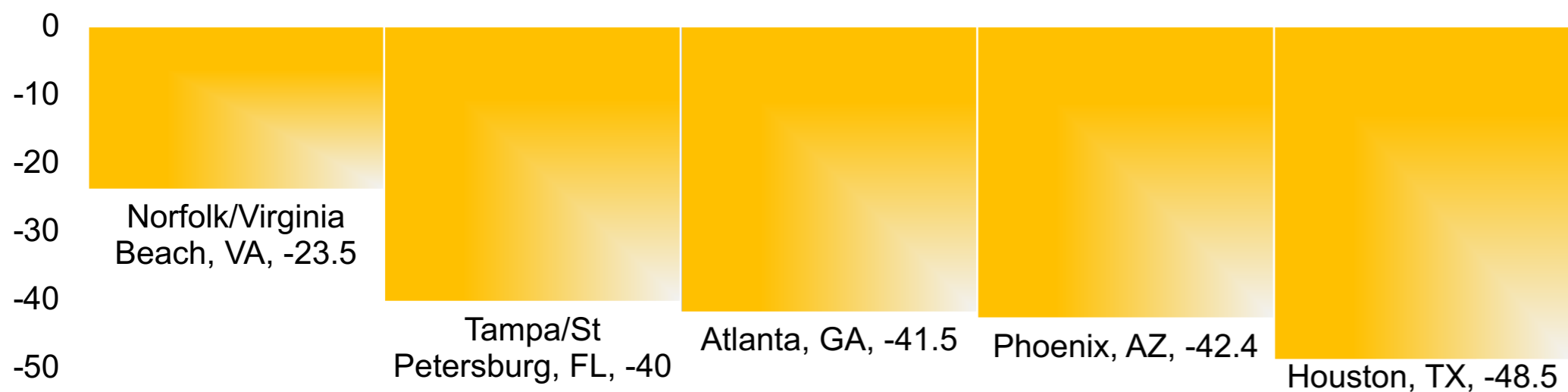


YTD RevPAR % Change by State

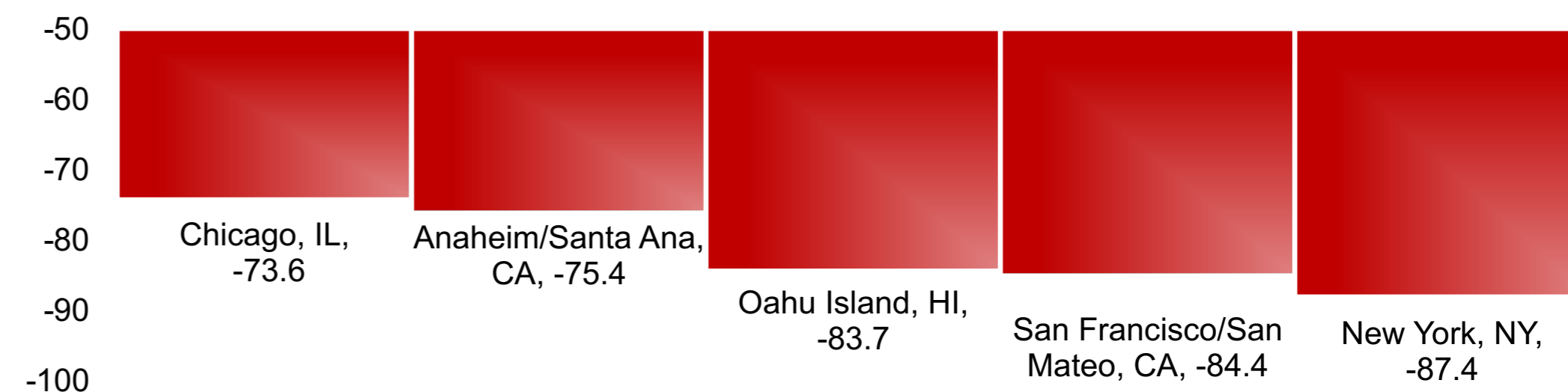


Top 25 Performing Markets

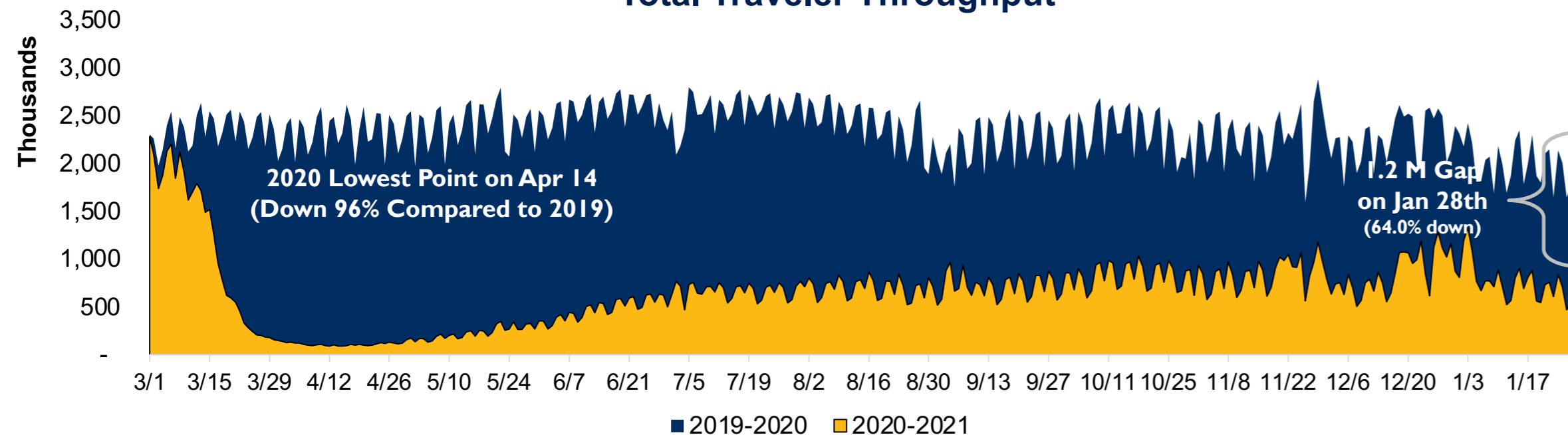
Top 5 Markets by RevPAR Percent Change December 2020 vs December 2019



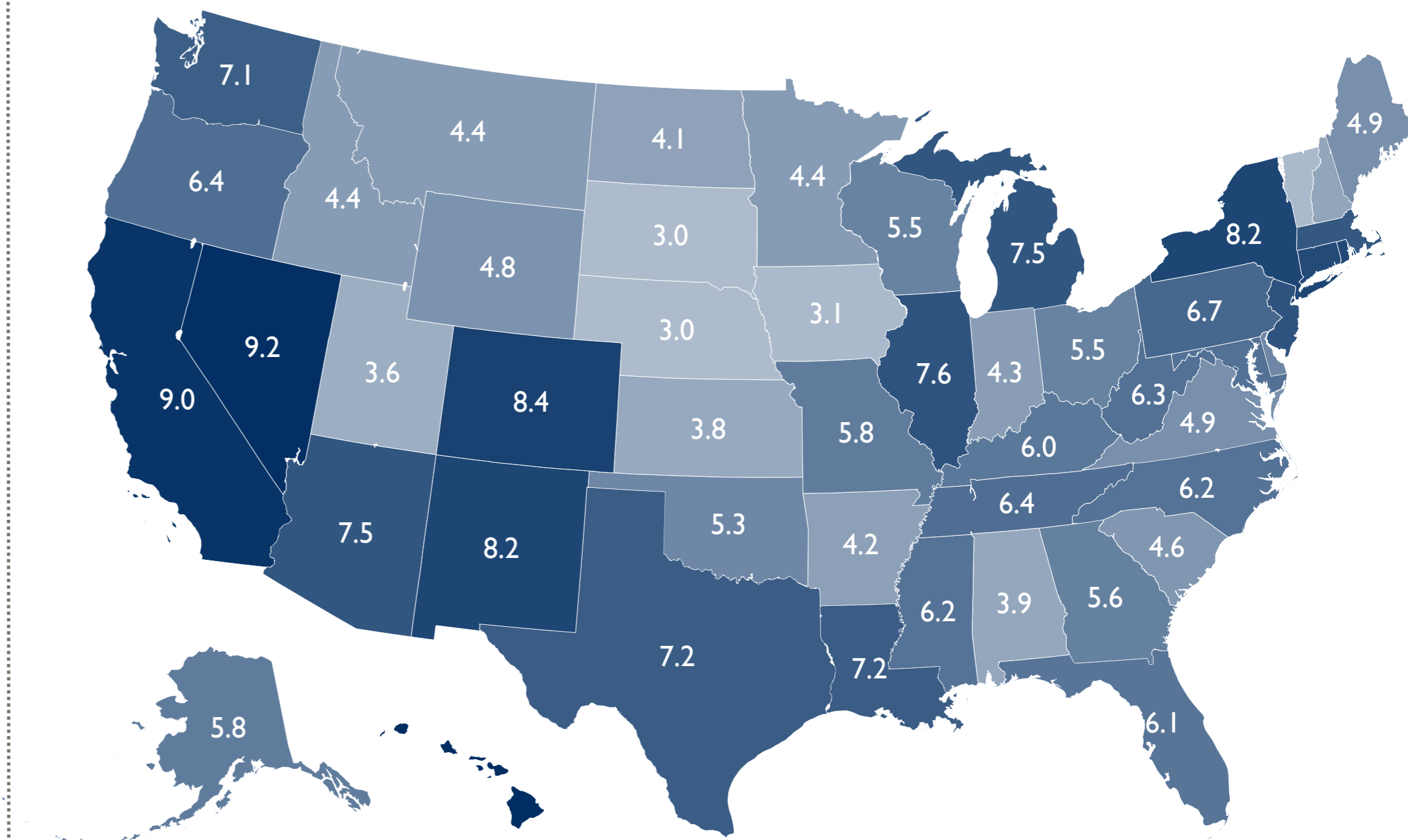
Bottom 5 Markets by RevPAR Percent Change December 2020 vs December 2019



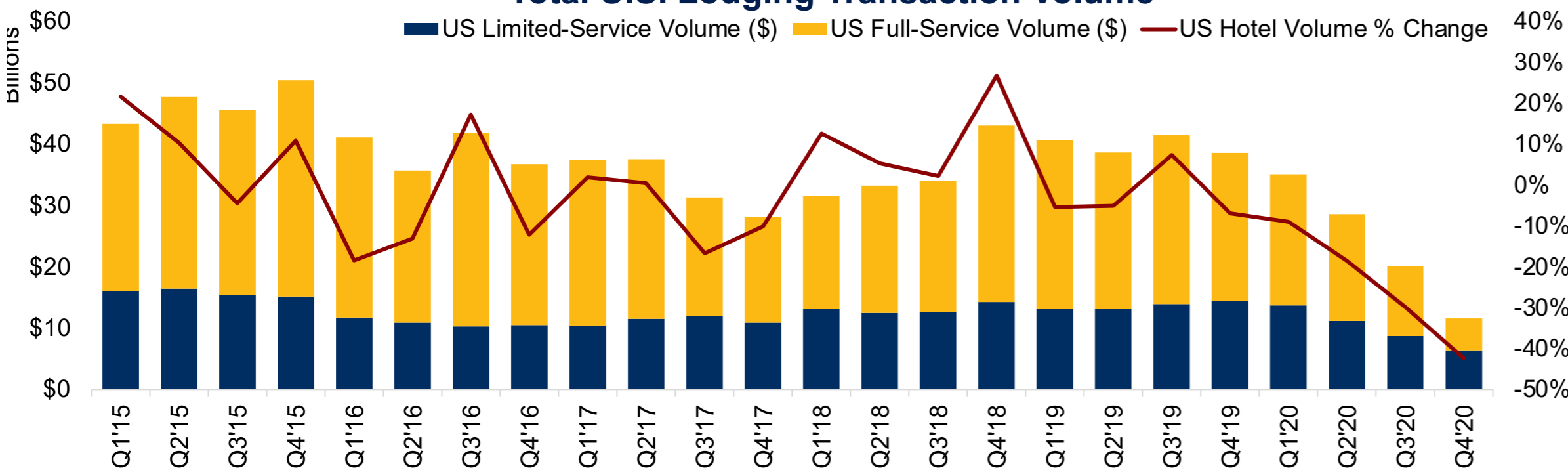
Total Traveler Throughput



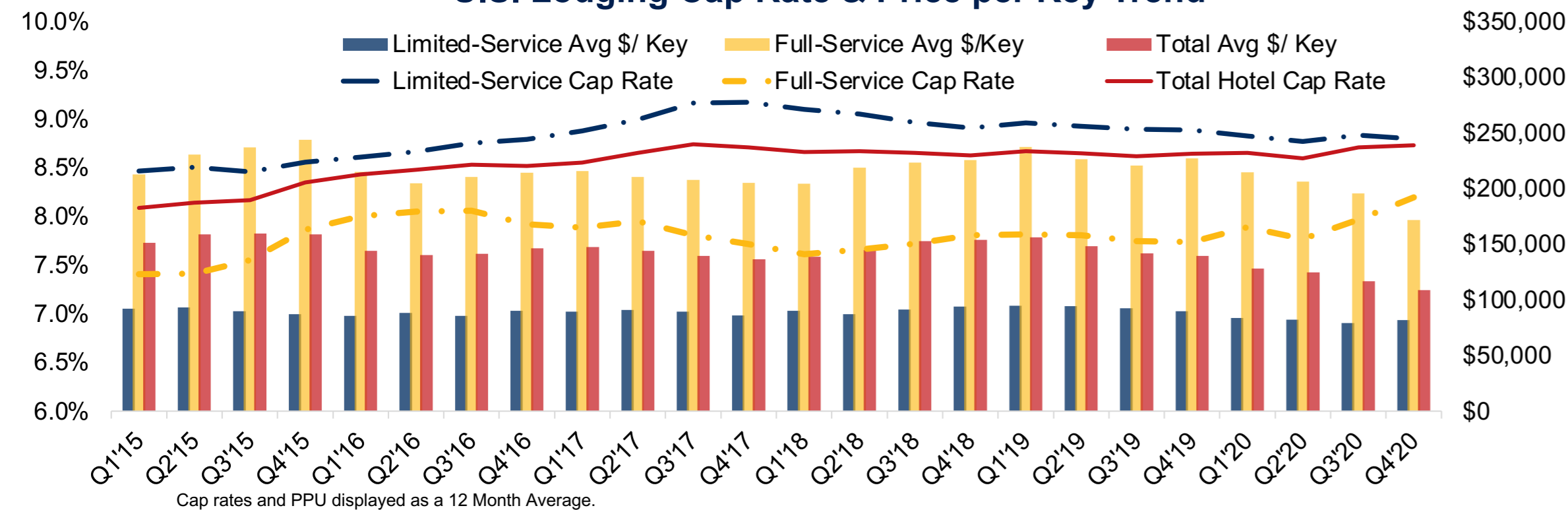
Unemployment Rate by State - December



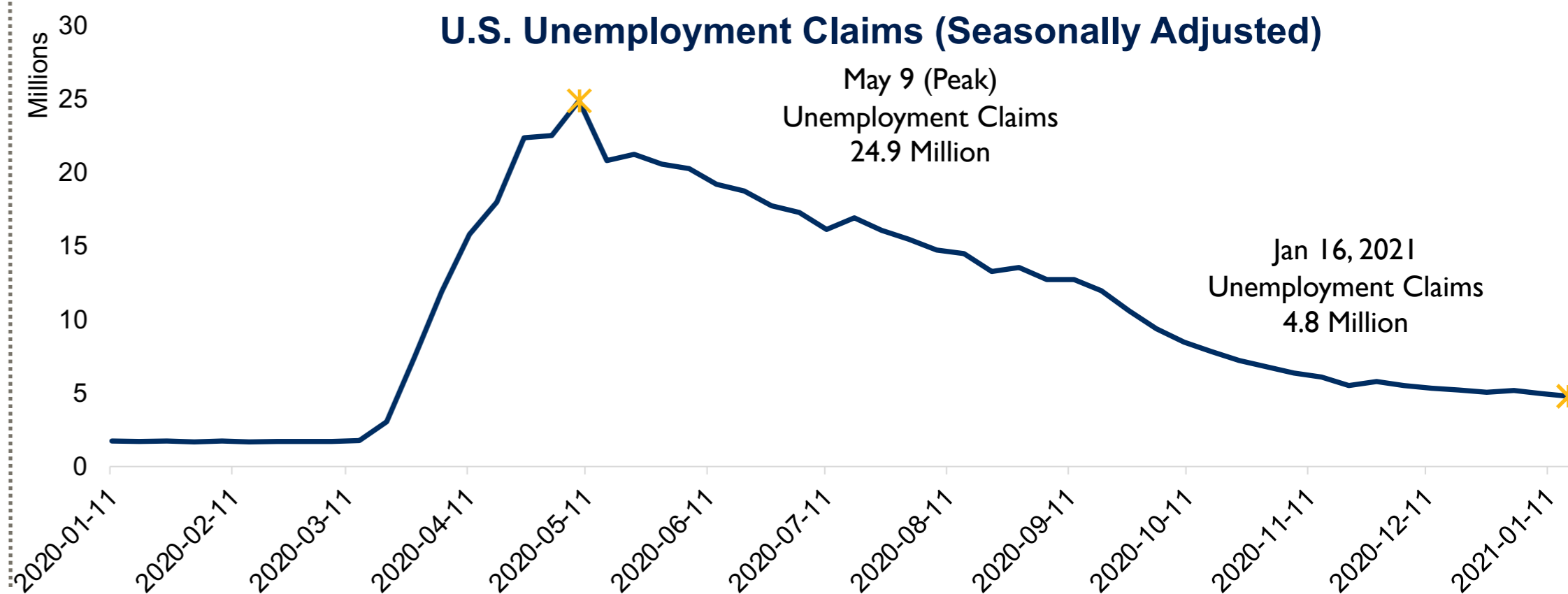
Total U.S. Lodging Transaction Volume



U.S. Lodging Cap Rate & Price per Key Trend



U.S. Unemployment Claims (Seasonally Adjusted)





At Horwath HTL, our focus is one hundred percent on hotel, tourism and leisure consulting. Our services cover every aspect of hotel real estate, tourism and leisure development.

We are a global brand with 49 offices in 39 countries, who have successfully carried out over 30,000 assignments for private and public clients.

We are part of the Crowe Global network, a top 10 accounting and financial services network. We are the number one choice for companies and financial institutions looking to invest and develop in the industry.

Our key areas of business are:

- Hotel Planning & Development
- Hotel Asset Management
- Hotel Valuation
- Health & Wellness
- Transactional Advisory
- Expert Witness & Litigation
- Leisure
- Tourism
- Hospitality Crisis Management

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- Hotel Planning & Development
- Hotel Asset Management
- Hotel Valuation
- Expert Witness & Litigation Support
- Tourism & Leisure
- Wellness & Sustainability
- Hospitality Crisis Management

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