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Hotel housing:
The past, the present, and the future

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Abstract

Hotels have historically provided an informal yet often overlooked housing choice for a diverse array of residents, from middle-class workers to transient individuals. Once regarded as a viable housing option, living in hotels has become increasingly stigmatized, relegated to lower-income groups who face barriers to renting or owning homes. As affordable housing becomes increasingly constrained, extended-stay hotels (ESH) are proliferating across the United States landscape, marking a new era of hotel living. This study investigates the historical shifts in hotel housing, its geographic patterns, and the demographic and economic traits of regions where low-tier (economy and lower midscale) extended-stay hotels are prevalent. Utilizing data from Smith Travel Research (STR), U.S. Census Bureau statistics, Opportunity Atlas, and Eviction Lab, we apply GIS mapping techniques to examine concentrations of low-tier ESHs across the nation. Our findings indicate that these hotels are now more concentrated in suburban and smaller metropolitan areas, a shift from the past when residential hotels were primarily located in urban hubs and along major highways. Counties with high concentrations of low-tier ESHs tend to have younger, more racially diverse populations, lower homeownership rates, and elevated eviction rates, all of which reflect reduced upward mobility compared to national figures. While ESHs do provide temporary housing with fewer barriers than traditional rentals, they also expose residents to financial and legal risks, often charging above-average rents without sufficient tenant protections. Despite their significance, ESHs are largely overlooked in housing policy and advocacy. This study underscores the

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prominence and precariousness of hotel-based living and advocates for policy measures that enhance tenant protections and acknowledge ESHs as an integral part of the affordable housing landscape.

Keywords
Hotel housing, extended stay hotels, hotel living, hotel housing history, housing continuum, housing crisis, low-income housing

Introduction

Hotels and hotel-like establishments have long functioned as more than temporary lodgings for travelers; they have also served as short- to long-term housing for individuals and families facing economic instability, displacement, or structural barriers to traditional rental markets (Groth, 1994; Lewinson & Carrion, 2020). From urban residential hotels in the early 20th century, to motels along the U.S. highway system, and now to the rise of suburban extended-stay hotels, hotel housing has continually evolved in response to shifting social, economic, and regulatory forces. While largely overlooked in mainstream housing policy discussions, hotels have consistently played a vital role in accommodating disenfranchised populations, emerging as an accessible, albeit precarious, alternative to traditional housing modalities.

This paper examines the past, present, and future of hotel housing in the United States, covering its history, assessing its current state, and analyzing contemporary clustering patterns of extended-stay hotels across the United States using hotel industry data and GIS mapping methods. Focusing on the physical location of residential hotels throughout history and into the present, contemporary hotel housing is placed within broader trends in housing precarity and market adaptation. This study contributes to critical conversations on informal housing, spatial inequality, and the structural conditions that lead to hotel living as a long-term housing option. The paper concludes with recommendations to address housing instability, reimagine the role of hotels in the broader housing landscape, and identify pathways for more sustainable and accessible housing solutions in the future.

History of hotels as housing

Hotel living has been an integral part of the U.S. residential landscape, evolving with market shifts, societal perceptions, and policy changes. This section examines how hotels have addressed Americans' housing needs throughout history.[1]

U.S. hotel living from inception through the 1930s

The roots of hotel living in what would become the United States trace back to the colonial period, when inns, taverns, and boarding houses operated by European settlers provided both temporary lodging and semi-permanent housing. Located along trade routes

[1] In this paper, 'Americans' refers broadly to people living in the United States, regardless of citizenship status.

and in port cities, these early establishments accommodated a wide range of people—including travelers, laborers, and the housing-insecure—laying the foundation for hotel-based housing in the post-revolutionary era (Sandoval-Strausz, 2007; Benes, 1995).

One of the most comprehensive accounts of this period comes from Paul Groth's 1994 book, *Living Downtown: The History of Residential Hotels in the United States*, which traces the social, economic, and spatial evolution of hotel housing from the 19th century through the mid-20th. Groth, a geographer and architectural historian, is widely regarded as a leading expert on residential hotels and their role in American urban life. His work provides detailed empirical analysis of how hotels functioned as flexible, affordable housing for a wide range of urban residents, especially in the decades when housing supply failed to meet the needs of rapidly growing cities.

Residential hotels played a crucial role in urban housing during the 19th and early 20th centuries, serving individuals from diverse socioeconomic, racial, ethnic, and immigrant backgrounds. As urban industrialization outpaced housing supply, hotels expanded rapidly to meet the needs of both short-term travelers and long-term residents (Groth, 1994; Sandoval-Strausz, 2007). Before the rise of formal residential hotels and SROs, low-income and working-class individuals often lived in boarding houses, tenements, shared rooms in private homes, or makeshift dwellings such as shanties or outbuildings. These accommodations were typically overcrowded, loosely regulated, and varied widely in quality and permanence (Groth, 1994; Abrams, 1965).

As the hotel sector evolved, it encompassed a range of housing types—including luxury establishments like New York's Chelsea Hotel, which hosted artists and professionals, as well as single-room occupancy (SRO) hotels intended for low-wage workers and immigrants. Beyond the bustling cities of the Eastern coast, hotels in the West also provided housing during the mid-19th-century gold rush—often overcrowded and unsanitary despite their high prices (Annals of San Francisco, 1855). Hotel living offered key advantages over conventional renting, such as the absence of lease requirements, rental references, and security deposits, along with flexible payment schedules, furnished units, and communal services like meals and laundry (Groth, 1994). Groth (1994) identifies three defining aspects of hotel life: individual freedom, a cosmopolitan neighborhood mix, and a lifestyle unbound by location and possessions.

Residential hotels shaped urban neighborhoods by providing housing for individuals with varying incomes across different social classes. Women's hotels, including the Hotel Martha Washington (1903–1970s, Midtown Manhattan), Trowmart Inn (1903–1970s, West 9th Street, Greenwich Village), and The Barbizon (1927–1980s, Upper East Side, Manhattan), aimed to promote the freedom and independence of young women while offering amenities such as artists' studios, gyms, and libraries. These hotels catered to a diverse group of urban women employed in factories and department stores, often reaching full capacity with long waitlists (Harkrader, 2019).

Groth (1994) notes, "the greatest historical detail dates from between 1880 and 1930, the period when downtown hotel life was most vigorous" (p. 1). This era of hotel living is

rooted in the urban environment, where hotels and SROs offered accessible housing for bohemians, immigrants, domestic migrants, and single women seeking opportunities in growing cities.

The mid-20th century

By the mid-20th century, economic and cultural shifts contributed to the decline of residential hotels in urban centers. Government programs and federal housing policies, such as the Housing Act of 1949, targeted older hotels and SRO buildings for demolition, displacing thousands of residents in these neighborhoods (Hartman, 1984; Hoch & Slayton, 1989). As policymakers aimed to modernize city centers, residential hotels were increasingly seen as outdated and deteriorating rather than as viable housing options. This perception was further reinforced by rising concerns over crime, changes in the drug market, and increased poverty in hotel districts, leading cities to implement restrictive zoning laws that effectively curtailed hotel residency (Knight et al., 2014; Wolch & Dear, 1993).

The cultural ideal of suburban living, promoted through post-war housing policies and mortgage subsidies, further decreased urban hotel living (Jackson, 1985). By the 1970s, hotel residency became primarily associated with poverty and housing instability. Hotel and single-room occupancy (SRO) housing persisted in cities with deeply unaffordable rental markets, such as San Francisco, New York City, and Chicago, but in steadily declining supply. Chicago's SRO units declined by 80% between 1960 and 1980, while New York City lost 60% of its units between 1975 and 1981 (Aberg-Riger, 2018). Many former hotel residents—particularly single adults, low-income workers, disabled individuals, immigrants, and people of color—had few housing alternatives following widespread SRO closures (Aberg-Riger, 2018; Hoch & Slayton, 1989; Groth, 1994; Wolch & Dear, 1993).

Despite the large-scale loss of urban residential hotels and SROs, the demand for flexible, low-barrier housing remained robust. Between the 1940s and 1980s, as car ownership increased, motor hotels, or 'motels', expanded quickly along the growing U.S. interstate system. Initially small and locally owned, motels were ultimately dominated by corporate chains through franchising, displacing many independent operators (Jakle et al., 1996; Brownrigg, 2006). Independent motels and hotels situated along less-traveled roads, which were bypassed by interstate expansion, increasingly relied on long-term residents to sustain occupancy and generate steady revenue, while franchises attracted the more lucrative short-term vacationing guests (Brownrigg, 2006). They offered long-term discounts and installed kitchenettes, providing a home for those whose financial circumstances or lifestyles did not fit conventional housing.

Contemporary hotel housing: 1990 to the present

In the latter half of the 20th century, marketing strategies reinforced the view of hotels as temporary lodging for travelers, as shorter stays generated higher revenue while the use of residential hotels remained stigmatized. However, by 1990, Groth (1994) estimated that

between one and two million people lived in hotels—outnumbering those in public housing at that time. While some contemporary hotel residents are transient laborers in need of flexible housing, a closer examination reveals that most are individuals and families seeking long-term primary residences but reside in hotels due to socioeconomic barriers that prevent access to traditional housing. This population includes low-income workers, older adults on fixed incomes, and families facing financial instability (Allen et al., 2019; Groth, 1994).

The extended-stay hotel represents the hotel industry's response to the ongoing shortage and exclusivity of conventional housing in the United States. This segment emerged in the 1990s when hotel and multifamily apartment developers recognized that extended-stay hotels (ESHs) had lower development and operational costs, consistently high occupancy rates, and generated greater revenues and better returns than traditional hotels and low-income multifamily apartments (Skinner & Berg, 1997; Beckford, 2023). Since then, the extended-stay hotel product has established itself as a significant force in the real estate market (Skinner & Berg, 1997). By 2010, there were over 300,000 ESH rooms in the United States, reflecting a 600% increase since 1995 (Skinner, 2010). In 2021, the largest ESH brand, Extended Stay America, was acquired for $6 billion by private equity firms. The stock price of Extended Stay America more than doubled in 2020, surpassing competitors Marriott and Hilton (Grant & Karmin, 2021). At the 2021 Hunter Hotel Investment Conference, in a panel titled 'Here to (Extended) Stay,' moderator Mark Skinner noted that extended stay hotels accounted for 25% of all hotels under construction in the United States in 2020 (Hunter Hotel Investment Conference, 2021). As of December 2024, Smith Travel Research (STR) counted 606,783 ESH rooms, and the Highland Group reported 48,182 ESH rooms under construction, with demand continuing to exceed the supply growth (Skinner, 2025). The U.S. extended-stay market is projected to grow from $18 billion today to $25 billion by 2027, with many hotel and multifamily developers eagerly entering the segment (Walker, 2024). The growth of this model reflects broader shifts in the housing market, affordability crises, wage stagnation, increased job insecurity and increased barriers to rental leases and homeownership.

A comprehensive investigation of ESH residents and their experiences was conducted in 2017 in Norcross, Georgia, where researchers found that nine out of 14 hotels in the city were primary residential facilities (Allen et al., 2019). Out of 175 survey respondents, 84% reported that a hotel was their primary residence, while a quarter reported that over 80% of their monthly income was allocated to housing costs. Respondents indicated eviction history and inability to pay upfront costs like a security deposit or advance payments on the last month of rent as major obstacles to securing traditional rentals. In fact, 69% of participants paid more than $1,000 a month to live in a hotel, which was comparable to the median monthly rent in Norcross at the time ($1,008). Researchers focused on healthcare and housing equity have also increased their attention on the long-term use of ESHs, describing them as 'de facto housing for the working poor' and 'de facto low-income senior housing' (Allen et al., 2019; LeBlanc, 2020; Guittar, 2017; Lewinson & Carrion, 2020; Lewinson & Collard, 2012; Lewinson & Esnard, 2015; Thompson, 2020; Wingate-Lewinson et al., 2010).

For marginalized renters, a low-tier ESH presents significantly fewer obstacles than traditional housing options. Hotels do not check guests' credit, eviction, or criminal history, nor do they require large upfront deposits to begin a stay. Like the Georgia study above reveals, this initial accessibility does not lead to sustained monthly savings on rent or reduced housing cost burdens for ESH residents. A month at an ESH typically costs the same as or more than the area's median rental rate, but for households whose circumstances exclude them from the rental market, the ESH is often the only option for private residential space.

In qualitative studies of ESH residents in metropolitan Atlanta from 2010, Lewinson and colleagues found that participants primarily viewed hotels as a last-resort housing option after experiencing evictions, job loss, and other forms of financial or social instability (Wingate-Lewinson et al., 2010; Lewinson, 2010). A prominent theme in this study was that participants perceived their hotel environments as a liminal, 'in-between' housing solution to tide them over until they could restore their credit or save enough money for a security deposit on an apartment or a down payment on a house. Meanwhile, participants felt 'stuck' in their hotels, with half reporting that they had been living there for over four months. Hotel living was accepted as a preferable alternative to homelessness, but only marginally so, with most participants expressing a desire to transition to 'better' housing situations.

This mindset contributed to another major finding in the research: hotel living was a source of shame, guilt, and anxiety for long-term residents. The collective shame of this experience may underlie the lack of community and social isolation described by hotel residents. Participants reported that they mostly kept to themselves and did not try to form meaningful connections with their neighbors, citing the temporary nature of their living situation as a reason these relationships seemed largely unnecessary. In a separate, more recent study of ESH residents in metropolitan Atlanta, participants indicated that a lack of trust in their neighbors was the primary reason for not initiating conversations or friendships; they feared that neighbors might be invovled in criminal activity such as drug use or prostitution (Lewinson & Carrion, 2020). They also discussed the danger and instability introduced into the hotel environment by non-residents who harassed renters and their families with threats of violence, drugs, and solicitation.

Despite the numerous challenges, ESH residents also identified positives in their living situations. Some participants in Lewinson's study in metropolitan Atlanta considered the location of their hotels a major benefit because grocery stores, shopping centers, and other community amenities were nearby. In another study, some older residents of ESHs highlighted similar advantages of their hotels, which were close to their healthcare providers, places of employment, and various leisure activities in the community; however, this convenience was offset by the fact that these hotel neighborhoods were not very walkable, with routes to local amenities crossing busy intersections or high-traffic areas that posed dangers for pedestrians (Lewinson & Esnard, 2015). Additionally, ESH rooms come equipped with a kitchenette, providing residents the flexibility to cook meals for their families in their rooms, which was more affordable than relying on buying meals at restaurants. Another positive aspect of hotel living was that it offered individuals and families a degree of privacy and flexibility compared to staying with extended family members while working

to restore their financial security or renter eligibility. A hotel room was their own space, and even if residents didn't necessarily want to stay in these hotels longer than needed, it provided a level of freedom that participants felt they lacked as guests in other people's homes (Lewinson, 2010).

As households increasingly rely on ESHs for primary housing, the legal status and rights of hotel residents are garnering more attention. In conventional rental housing relationships, landlord-tenant policies provide tenant rights at the federal, state, and local levels across the country. Hotels are governed by innkeeper and guest policies, which do not exist at a federal level and vary significantly from state to state (Thompson, 2020). This leads to hotel residents frequently facing eviction, lockouts, and other housing injustices without legal recourse (Reyes, 2024). However, legal cases are being initiated to address this tenant-rights inconsistency. *Efficiency Lodge Inc. v. Neason* (2021) was a case involving three tenants who were evicted from an Efficiency Lodge extended-stay hotel, despite being long-term occupants. The case ultimately advanced to the Georgia Supreme Court, which remanded it after establishing a legal framework for determining whether a landlord-tenant or innkeeper-guest relationship exists. The framework emphasizes the substance of the relationship (i.e., long-term presence, and tenants performing maintenance) over its form (i.e., the establishment is registered as a hotel). The tenants' lawyers viewed the legal framework's outcome as a success, stating, 'residents living in extended stays will have due process' (Mayfield, 2023). This court framework applies only to the state of Georgia but could set a precedent for other states as hotel housing becomes more visible.

The increased prevalence and legal protections for hotel residents has already spurred the creation of companies like Guest Ban, whose services include eviction history, credit checks, and Do Not Rent (DNR) lists for extended-stay hotels (B., 2024). This grey area between hotel housing and conventional low-income rental housing reflects the growing reliance on hotels by resource-constrained households and demonstrates the complexity of ensuring tenant protections while unintentionally replicating the barriers found in the formal housing market.

This historical overview has highlighted how the hotel industry has provided shelter to populations that conventional housing has neglected. But stigmatization has obscured hotel housing's ongoing role in the housing continuum. At the same time, where one lives is closely linked to their ability to find gainful employment, education, proper nutrition, and accessible healthcare. It is therefore essential for legal scholars, housing advocates, developers, and healthcare professionals to understand not just the conditions of ESH living, but also where this historic and re-emerging form of housing exists and where it is likely to be developed.

Extended stay hotels: contemporary distribution

This study investigates the geographic distribution of low-tier extended stay hotels (ESH) throughout the United States, identifying areas where these establishments are concentrated. By analyzing the demographic, economic, and neighborhood characteristics of these locations, the study provides insights into the communities surrounding low-tier ESHs.

The next section outlines the methodology employed by the study team, detailing the data sources and analytical approach used to assess patterns of ESH clustering and key statistics about these regions.

Methods: Data Collection

To analyze the distribution of Extended Stay Hotels (ESHs) across the United States and examine the demographic and geographic characteristics of these regions, we gathered data from various sources.

Hotel Listing Data

Smith Travel Research (STR) is a leading provider of market data and analytics for the global hotel industry (STR, 2021). STR aggregates data from 68,000 hotels across 180 countries, offering insights into market trends, performance, and spatial distribution. Academic researchers can access STR data through the SHARE Center, which provides curated reports for research purposes. For this study, we obtained a hotel listing report from STR via the SHARE Center, delivered in Excel format. The dataset included a comprehensive listing of all extended-stay hotels in the U.S. as of June 2021. Key variables in the dataset include:

- Hotel Characteristics: Chain Name, Chain Scale (Economy through Luxury), Total Rooms, and Opening Date.
- Geographic Information: Physical Address, City, State, Longitude, and Latitude.
- Market Segmentation: Location Segment (e.g., Urban, Suburban, Interstate, Airport, Resort, Small Metro/Town).
- Contact Information: Hotel management details (where available).

These data formed the basis for creating our GIS maps, allowing for spatial analysis of hotel distribution patterns. Below, we provide a descriptive summary of the dataset. Table 1 presents summary statistics for several key hotel attributes. The average year of hotel openings is 2004, with a range from 1923 to 2021. The average hotel size is 105 rooms, though sizes range from 17 to 421 rooms.

Table 1
Extended stay hotel descriptives

Variable	Mean	Std. Dev.	Min	Max
Hotel Open Year	2004.	9.67	1923	2021
Total Rooms in Hotel	105.42	31.17	17	421

N=2,276

Figure 1
Distribution of Extended Stay Hotel locations

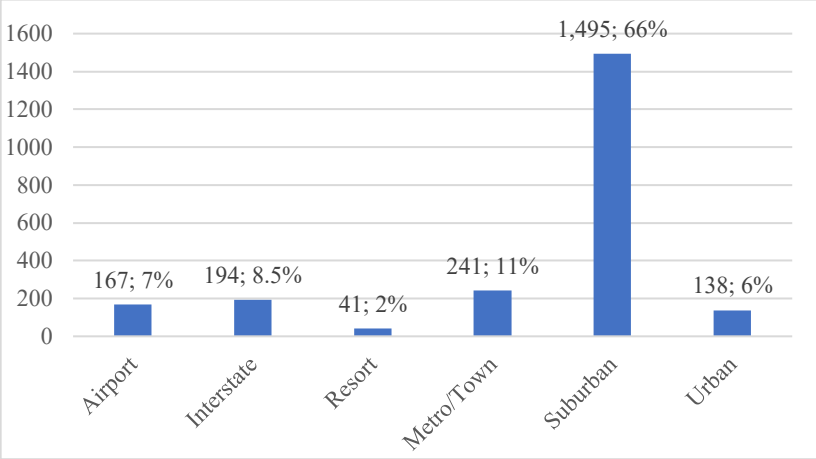


Figure 2
Distribution of hotel chain scale.

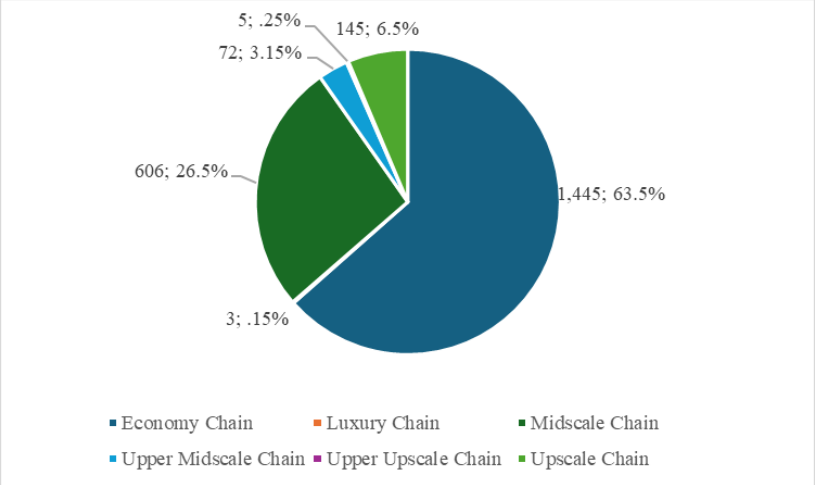


Figure 1 displays the distribution of hotel locations, highlighting that the majority of ESHs are in suburbs (66%), followed by small metros (11%), and interstate settings.

Figure 2 visualizes the chain scale distribution, showing that economy and midscale chains dominate the extended-stay hotel sector, with limited representation from upscale and luxury chains.

Hotel Industry Data

For industry-wide hotel data, we requested 'Trend Reports' and 'Location Trend Reports' from STR for U.S. hotels and specific segments. Trend Reports, covering January 2000 to July 2021, include monthly data on occupancy rates, average daily rates, revenue per available room (RevPAR), supply, demand, revenue, property counts, and room counts. Location Trend Reports add location-specific characteristics (e.g., Airport, Urban, Suburban) for segment analysis. Data was delivered in Excel format for detailed trend analysis.

Census Geographies

Census geographies provide a framework for linking datasets in this study. Two geographic levels were used: state and county areas, as well as Census Block Groups (CBGs), which are the smallest units for which the decennial census publishes data ('Census Blocks

and Block Groups,' 2021). After generating GIS maps with these census layers (detailed in the analysis section), additional datasets were overlaid to enhance insights into the socioeconomic and spatial contexts of low-tier extended-stay hotels. The following section discusses these data sources.

State and County Data Sets

Census Bureau Quick Facts: For housing, demographic, and socioeconomic data in State and County geographic areas, we downloaded Quick Facts datasets from the U.S. Census Bureau website (U.S. Census Bureau, n.d.).

Opportunity Atlas: To assess opportunity and upward mobility in counties with low-tier ESHs, we utilized data from the Opportunity Atlas, created by Harvard University and the U.S. Census Bureau. This dataset offers insights into long-term economic outcomes, including household income, educational attainment, incarceration rates, and job prospects, which help contextualize the socioeconomic conditions of regions where low-tier ESHs are concentrated.

Eviction Lab: Eviction data from Princeton University's Eviction Lab was analyzed alongside GIS maps to examine housing instability and displacement trends. This publicly available dataset monitors eviction filings, rates, and trends across cities and states, providing essential insights into economic precarity and the structural factors that contribute to extended-stay hotel residency (Desmond et al., 2018).

Census Block Group Data Sets

AARP Livability Index: The AARP Livability Index measures neighborhood livability on a 0–100 scale at CBG, county, city, and state levels (Harrell et al., 2021). The index evaluates seven livability categories using over 50 data sources from public and private institutions, with more than half of the data available at the neighborhood level.

Since the Livability Index does not permit direct or batch downloads, we requested data from the AARP Public Policy Institute for each CBG containing a low-tier ESH. The supplied metrics covered housing (affordability, cost burden, multi-housing availability), neighborhood accessibility (proximity to grocery stores, parks, and jobs), transportation (transit frequency, crash rates, speed limits), environmental factors (water quality, pollution), health (access to healthcare and preventable hospitalizations), engagement (voting rates, civic participation), and economic opportunity (age diversity, fiscal health, and local creditworthiness)Analysis

GIS Mapping: Geographic analyses were conducted using QGIS (version 3.10.19), an open-source Geographic Information System. The study integrated Smith Travel Research (STR) hotel data with location coordinates and various publicly available datasets (described above) at the state, county, and census block group (CBG) levels. The following outlines the QGIS workflow for the Extended-Stay Hotel (ESH) location analysis:

1. *Project Creation:* A new project was initiated in QGIS.

2. *Spatial Data Acquisition:* For State and County geographic areas, The American Community Survey 5-Year Estimates—Geodatabase Format for state and county geodatabases, along with the corresponding shapefiles, were downloaded from the U.S. Census Bureau website. For CBG geographic areas, shapefiles were downloaded from the Census website.

3. *Data Import:* The unzipped geodatabases and shapefiles were dragged into the QGIS project, creating a polygon layer delineating state, county, and CBG boundaries.

4. *Preparation of STR data:* A new Excel file ('ESH LIST') was created by copying relevant columns from the STR Hotel Listing. The selected columns included hotel identifier, chain name, physical address, city, state, postal code, merged address, opening year, total room count, chain scale, location, latitude, and longitude. The file was then saved in comma-delimited (.csv) format.

5. *Plotting ESH Locations:* In QGIS, the 'Add Delimited Text Layer' tool (accessed via the Data Source Manager) was used to import the 'ESH LIST' CSV file. The geometry was defined as 'Point Coordinates' with the X field set to longitude and the Y field set to latitude. Upon adding the file, the ESH data was converted into a point shapefile layer, projecting each ESH location across the United States.[2]

6. *Data Filtering:* For the purposes of this analysis, only economy and midscale (low-tier) ESH locations were retained. The dataset was filtered accordingly to exclude other categories.

7. *Counting ESH Locations:* To determine the number of economy and midscale ESHs in each state county and CBG, the 'Count Points in Polygon' tool was used (located under Vector → Analysis Tools). This step produced a new layer with an additional attribute column indicating the count of ESH locations within each polygon (geographic area). The count data were then exported to Excel for further analysis.

8. *County Study Area and Analysis:* After counting low-tier ESHs in each county, we selected six counties with the highest number of low-tier ESHs, limiting our selection to one county per state. We downloaded and reviewed the Census Bureau Quick Facts datasets, Opportunity Atlas datasets, and Eviction Lab datasets for these six counties as well as nationwide.

9. *Neighborhood Study Area and Analysis:* The geocodes of all low-tier ESHs were matched to the AARP Dataset, achieving a match rate of 67%. Analysis was conducted on this population of CBGs containing low-tier ESHs.

[2] We chose to map low-tier ESH rather than all housing hotels for several reasons beyond research capacity. First, the production of contemporary hotel housing in the United States is centered on ESHs. Second, ESHs offer the most apartment-like accommodation of hotel housing types. Focusing on ESH locations prioritizes understanding the future of hotel housing in the United States as left to the private market.

Results

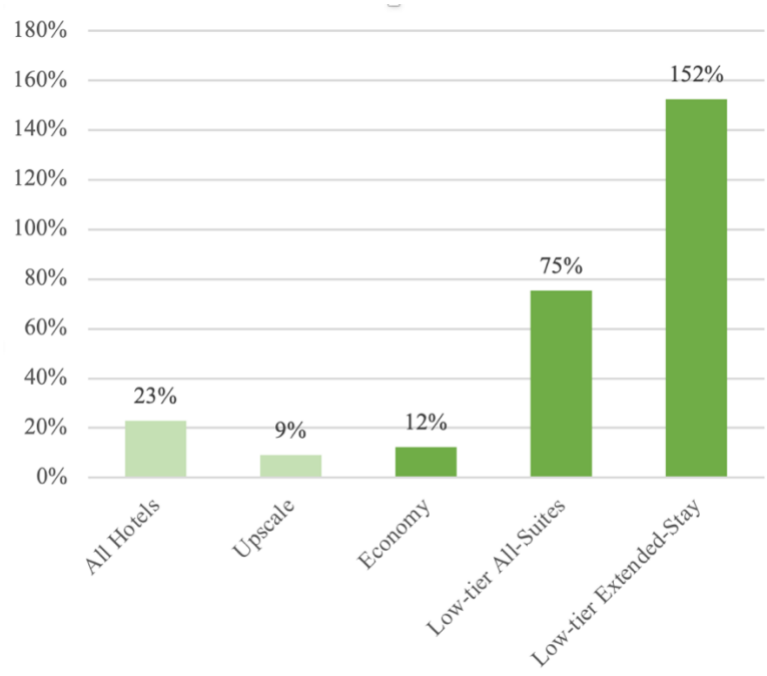
Growth of housing hotels

Significant transformations have occurred within the U.S. hotel industry since 2000, the earliest year for which STR data was available. In January 2000, 62% of hotel properties were classified as upper-class; by July 2021, this percentage had dropped to 55%. At the same time, two specific hotel segments showed particularly rapid growth during this period (low-tier all suites and low-tier ESH),[3] as illustrated in Figure 3.

STR location segment trend reports for residential hotels indicate distinct growth patterns across different settings. As illustrated in Figure 4, residential hotels experienced the most pronounced growth in small metropolitan, town, and suburban areas, whereas resort locations registered the steepest declines. These findings suggest a market shift, with demand increasingly favoring residential hotels in urban and suburban environments over traditional resort locations.

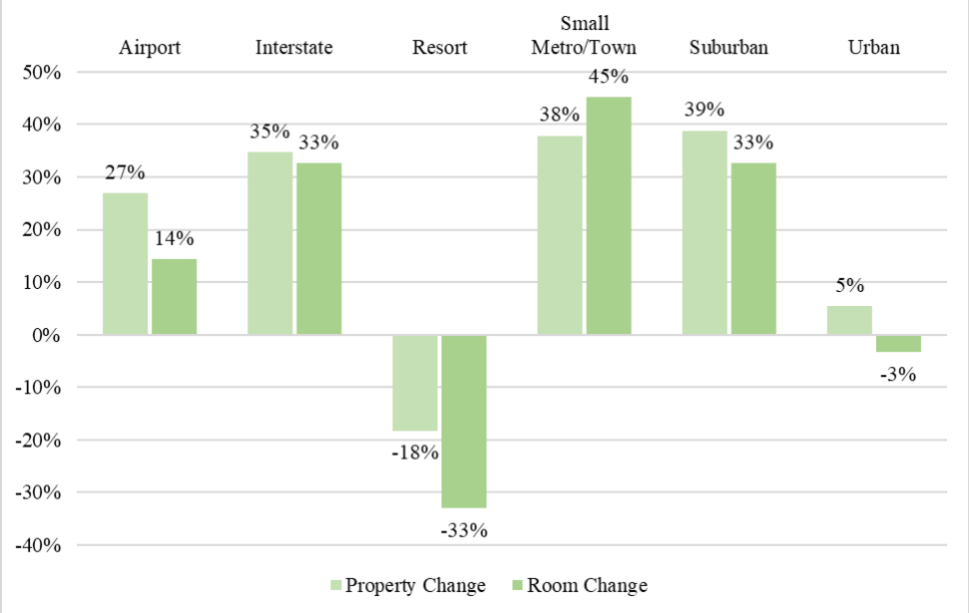
Examining residential hotel locations reveals several key trends. First, residential hotels, particularly those designed in an apartment-style format, are increasingly concentrated in suburban and small metropolitan/town settings. In contrast, both resort and urban locations continue to have relatively few residential hotel rooms, a pattern that 21st-century growth trends suggest will persist. Additionally, interstate economy hotels account for a significant proportion of older residential hotels; 93% of these properties were constructed prior to 2000. This finding supports the evolution of hotel housing from interstate motels (Brownrigg, 2006) to suburbs, small towns, and metropolitan areas. Using QGIS, we map low-tier ESH to observe their exact locations and distribution across the United States.

Figure 3
Hotel segment growth January 2000-July 2021.



[3] While both all-suite hotels and extended-stay hotels (ESHs) offer suite-style accommodations, ESHs are designed for long-term stays, typically featuring in-room kitchen facilities and amenities tailored for extended occupancy, whereas all-suite hotels cater primarily to short-term travelers seeking additional space.

Figure 4
Hotel Housing Location Analysis – Property and Room Change – 2000 to 2021.



Note – January 2000 to July 2021 hotel property and room growth for each location segment. Residential hotels include economy hotels, low-tier All Suite and low-tier ESH.

Distribution of ESH hotels across the United States

Each hotel listing included coordinate points, enabling the mapping of hotels (N=2,051) across the United States. For presentation purposes, Hawaii and Alaska are excluded from the map figures. There are five Low ESHs in Alaska and none in Hawaii, according to STR. The five Alaskan hotels are counted in the total hotel count but are not shown in Figures 5 and 6.

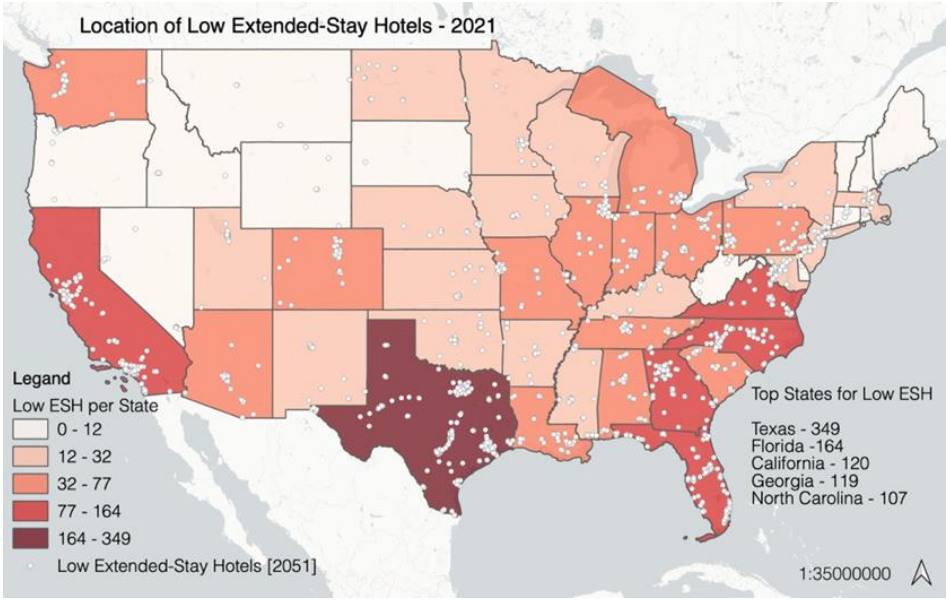
Low-tier extended-stay hotel clusters

Figure 6 displays the number of low-tier extended-stay hotels (Low ESHs) in each county across the continental United States. In total, 548 counties contain at least one low tier ESH. Notably, eleven counties—numbered in Figure 6—each host twenty or more low tier ESHs, and together these counties account for 16% of all low-tier ESHs nationwide. Furthermore, over 89% of counties with low-tier ESHs have two or more such hotels, 61% have five or more, and 34% have 12 or more. This county-level analysis reveals that low-tier ESHs are concentrated in a relatively small number of counties.

County Demographic and Housing Analysis

To identify potential demographic and economic patterns in counties with a high concentration of Low ESHs, we selected the county with the highest number of low-tier ESHs in each state with more than 20 such facilities. For these six counties, we gathered data from the U.S. Census Bureau's QuickFacts and compiled additional information from the Opportunity Atlas and Eviction Lab. The descriptive statistics are summarized below as well of a summary of the six counties researched.

Figure 5
Low tier extended stay hotel locations in the United States.



Note: Map showing the location of 2,051 low extended-stay hotels in the Continental United States. Not shown: Alaska and Hawaii.

Figure 6
Counties with low tier extended stay hotels by density.

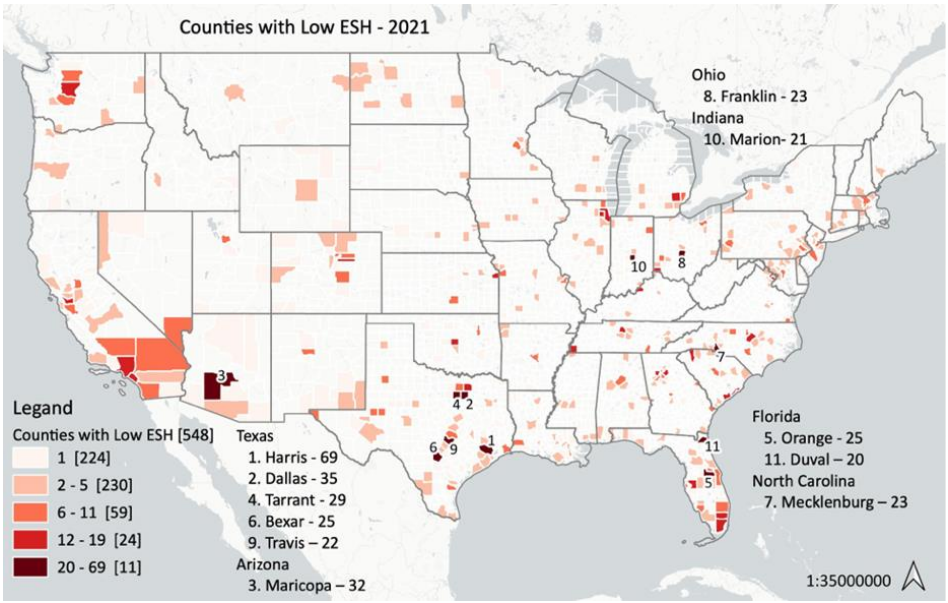


Table 2 shows the six counties selected that contain over 20 low-tier ESHs are economically diverse with a range of prominent industries, many with sectors that may rely on a transient workforce. University level students make up over 10% of the population in half of the selected counties. More research is needed to understand what portion of hotel residency is occupied by transient labor and student populations and what portion is driven by the inaccessibility of conventional housing.

Table 2

Prominent industries and university populations for selected counties

County (State)	Prominent Industries	Univ-Level Students (% of Total Population)	Sectors Likely to Rely on Transient Workforce
Harris County, TX	Oil & gas, healthcare, aerospace, logistics, tech	211,000 / 4.8M = ~4.4% (Data USA, 2023; Harris County Economic Highlights, 2024)	Energy, logistics, healthcare support, airport services (HCOED, 2024)
Maricopa County, AZ	Semiconductors, tech, healthcare, government, education, logistics	511,000 / 4.5M = ~11% (Data USA, 2023; Maricopa CCD; FT, 2023)	Semiconductor fabs, advanced manufacturing, logistics/warehousing, construction (FT, 2023)
Orange County, FL	Tourism, hospitality, optics/photonics, biomedical, conventions, corporate HQs	163,000 / 1.45M = ~11% (Data USA, 2023; UCF Enrollment Reports, 2023)	Theme parks, hospitality, events/conventions, food service (Business Orlando, 2023)
Franklin County, OH	Government, healthcare, education, retail, manufacturing	111,000 / 1.34M = ~8.3% (Data USA, 2023; Ohio LMI, 2023)	Seasonal retail, healthcare aides, government interns, construction (Ohio LMI, 2023)
Mecklenburg County, NC	Banking, tech, advanced manufacturing, life sciences, logistics	56,000 / 1.12M = ~5.0% (Data USA, 2023; UNC Charlotte, 2024)	Logistics/distribution, temp staffing in finance/tech, healthcare (Charlotte Regional Business Alliance, 2023)
Marion County, IN	Manufacturing, healthcare, logistics, retail, agriculture	156,000 / 982K = ~16% (Data USA, 2023; Hoosier Data, 2023)	Agriculture, light industrial work, logistics, construction (Hoosier Data, 2023)

Table 3

Age statistics for selected counties.

Location	Hotel Count	Under 18	Over 65
Harris County, Texas	69	26%	11%
Maricopa County, Arizona	32	24%	16%
Orange County, Florida	25	22%	12%
Franklin County, Ohio	23	23%	12%
Mecklenburg County, North Carolina	23	23%	12%
Marion County, Indiana	21	25%	13%
County Average		24%	13%
Total United States		**22%**	**17%**

Table 4

Race and foreign status statistics for selected counties.

Location	Hotel Count	White	Black	Hispanic	Foreign Born	English not spoken at home
Harris County, Texas	69	29%	20%	44%	26%	44%
Maricopa County, Arizona	32	55%	6%	31%	15%	27%
Orange County, Florida	25	39%	23%	33%	22%	37%
Franklin County, Ohio	23	62%	24%	6%	11%	14%
Mecklenburg County, North Carolina	23	46%	33%	14%	15%	20%
Marion County, Indiana	21	54%	29%	11%	10%	14%
County Average		47%	23%	23%	16%	26%
Total United States		**60%**	**13%**	**19%**	**14%**	**22%**

As shown in Table 3, these counties tend to have a younger population compared to national averages, suggesting that areas with a high concentration of low-tier ESHs may be characterized by a demographic profile skewing younger.

Table 4 presents racial and ethnic composition statistics for counties with a high concentration of Low ESHs. These counties have a significantly lower proportion of white residents compared to the national average, while Black and Hispanic populations are notably more prominent. The representation of Asian, Native American, and multiracial populations aligns closely with national averages.[4] Additionally, a higher percentage of residents in these counties are foreign-born and more commonly speak a language other than English at home compared to the national average.[5]

Table 5 highlights key housing and mobility trends in counties with 20 or more Low ESHs. Homeownership rates in these counties are 8% lower than the national average, while median gross rent is slightly higher. Population growth in these counties outpaced the national average by 10%, suggesting increased demand for housing. Additionally, these areas exhibit higher residential mobility, with 17% of the population having moved in the past year compared to 14% nationally. Evictions are over 1% more common in these counties than the national average, and the states in which these counties are located also have higher overall eviction rates.

[4] We use the term 'Native American' here to reflect the language used in U.S. Census Bureau and other federal datasets referenced in this analysis.

[5] Note on Demographic Variables: While gender identity, immigration status, and disability are all critical factors in understanding housing precarity, these data were not consistently available across the county-level sources used for this analysis (U.S. Census QuickFacts, Opportunity Atlas, Eviction Lab). As a result, we focused on race, ethnicity, nativity, and language—variables consistently reported at the county level and relevant to existing literature on hotel housing and structural marginalization.

Table 5

Housing statistics for selected counties.

Location	Hotel Count	Owner-occupied Housing	Median monthly owner costs - with a mortgage	Median Gross Rent	Living in same house 1 year ago	Population change - 2010 to 2019	Eviction Rate*	State Eviction Rate*
Harris County, Texas	69	55%	$1,649	$1,078	84%	15%	2.4%	2.2%
Maricopa County, Arizona	32	62%	$1,550	$1,127	83%	18%	3.9%	3.9%
Orange County, Florida	25	55%	$1,567	$1,215	82%	22%	3.0%	2.5%
Franklin County, Ohio	23	53%	$1,470	$974	81%	13%	4.8%	3.5%
Mecklenburg County, North Carolina	23	56%	$1,494	$1,146	82%	21%	5.8%	4.6%
Marion County, Indiana	21	54%	$1,169	$889	86%	7%	2.0%	4.1%
County Average		56%	$1,483	$1,072	83%	16%	3.6%	3.5%
Total United States		**64%**	**$1,595**	**$1,062**	**86%**	**6%**	**2.3%**	**2.3%**

** Data from Eviction Lab (Desmond et al., 2018).*

Table 6

Opportunity statistics for selected counties

Location	Hotel Count	Bachelor's degree or higher	Median household income	Poverty %	Percentile Household Income at 35 for children of low-income Parents*
Harris County, Texas	69	32%	$61,705	15%	49%
Maricopa County, Arizona	32	33%	$64,468	12%	34%
Orange County, Florida	25	35%	$58,254	13%	20%
Franklin County, Ohio	23	40%	$61,305	14%	12%
Mecklenburg County, North Carolina	23	45%	$66,641	10%	9%
Marion County, Indiana	21	31%	$48,316	15%	6%
County Average		36%	$60,115	13%	22%
Total United States		**32%**	**$62,843**	**11%**	**50%**

Table 6 presents opportunity-related statistics for counties with more than 20 Low ESHs. These counties have a slightly higher percentage of college-educated residents compared to the national average. However, poverty rates are, on average, 2% higher than the national level. Data from the Harvard-created Opportunity Atlas (Opportunity Insights, 2021) further highlight challenges in economic mobility: children raised in low-income households in these counties reach, on average, the 22nd percentile of earners by age 35. This indicates significantly limited upward mobility, as these individuals earn less than half of what their low-income counterparts achieve nationally.

Census Block Group (CBG) analysis

Census Block Groups (CBG) are a cluster of street blocks within a census tract that contain 600 to 3,000 people and 240 to 1,200 housing units (2020 PSAP Quick Reference: Block Groups, 2021). AARP uses this statistical area for neighborhood-level livability analysis (Harrell et al., 2021). From the 2,051 CBG geocodes (neighborhoods) that contained at least one low-tier ESH, AARP's Livability Team returned data for 1,162 CBGs (neighborhoods) containing 1,377 low-tier ESHs, which represents 67% of all low-tier ESHs in the STR dataset (retrieved in 2021). Analysis of the AARP dataset reveals that 27% of low-tier ESHs are in a CBG that contains at least two low-tier ESH.

The mismatch between ESH coordinates and AARP data may arise from factors such as the presence of newly built hotels or the geocodes changing between 2010 and 2020. However, for the purposes of this study, 67% of low-tier ESHs in the preliminary analysis is deemed sufficient to generate meaningful insights for future research.

Tables 7 through 9 present selected results of the AARP livability data for the 1,162 CBG-level neighborhoods containing at least one low-tier ESH. National statistics serve as a benchmark to compare how neighborhoods with low-tier ESHs differ from the average U.S. neighborhood.

Several general neighborhood observations arise from the AARP data shown in Table 7. The overall livability score for low-tier ESH neighborhoods is 50, suggesting that these neighborhoods are not more or less liveable as per the AARP Livability Index Score.

Among the seven AARP livability categories, neighborhoods with low-tier ESHs score higher in Housing, Neighborhood, Health, Engagement and Opportunity. However, they score lower in Transportation and Environmental categories, indicating possible challenges related to public transportation, walkability, and environmental quality.

Housing, Neighborhood, and Health livability scores for low-tier ESH neighborhoods rank higher than the average American neighborhood. Table 8 reveals that low-tier ESHs are located in neighborhoods with a higher proportion of multifamily housing units compared to the national average of 18%. These neighborhoods also benefit from greater proximity to grocery stores and parks, whereas the median U.S. neighborhood has fewer amenities within close range.

Recreational facilities and cultural organizations are found at comparable levels in low-tier ESH neighborhoods as in average neighborhoods. Furthermore, these areas tend to be more compact, suggesting a higher population density. However, crime rates in low-tier ESH neighborhoods are higher than the national averages, emphasizing potential safety concerns.

Transportation and environmental livability scores for low-tier ESH neighborhoods are nearly seven points lower than those for average neighborhoods. As shown in Table 9, these neighborhoods have higher speed limits and a noticeably greater rate of car-related fatalities compared to the national average. Additionally, 20% of residents in low-tier ESH neighborhoods are exposed to roadway pollution, underscoring potential environmental health concerns.

Poor drinking water quality is also 4.16% more common in these neighborhoods. Furthermore, they are more likely to experience a shortage of medical professionals, which may limit healthcare access. However, preventable hospitalizations are slightly less common in low-tier ESH neighborhoods than in the average American neighborhood.

Table 7

AARP Livability Index Scores – Low ESH Neighborhoods.

Location	Hotel Count	Total Livability	Housing	Neighborhood	Transportation	Environmental	Health	Engagement	Opportunity
1,162 neighborhoods	1377	50.2	55.1	51.3	43.5	43.3	55.0	50.8	52.7
Total United States		**50**	**50**	**50**	**50**	**50**	**50**	**50**	**50**

Table 8

AARP Livability Metrics for Further Analysis – Low ESH Neighborhoods.

Location	Hotel Count	% Non-Single Family Detached Homes	Per 1/2 Mile		Per 1 Mile		Per 10,000 People	
			# of Grocery Stores	# of Parks	Recreational Facilities	Compactness - Jobs + People	Culture Organizations	Violent and Property Crimes
1,162 neighborhoods	1,377	44%	1.19	0.55	88%	4,084	0.13	340
Total United States		**18%**	**0**	**0**	**91%**	**3,020**	**0.10**	**261**

Table 9

AARP Livability Metrics for Further Analysis – Low ESH Neighborhoods, continued.

Location	Hotel Count	Speed Limit (MPH)	Fatality Rate	% of population drinking water with at least 1 health violation	% of population living near Roadway Pollution	Health Professional Shortage - Scale 0 - 25	Preventable Hospitalizations per 1,000
1,162 neighborhoods	1,377	36	8.2%	5.26%	20%	2.40	48
Total United States		28	6.8%	1.10%	0%	0	49

Discussion

Hotels have historically provided an informal yet often overlooked housing alternative, catering to a diverse array of residents, from upper and middle-class workers to transient individuals. Once a more accepted form of housing, living in hotels has increasingly become stigmatized and relegated to lower-income groups, contemporarily with the rise of low-tier extended-stay hotels (ESHs). This study explores the evolution of hotel housing, its geographic distribution, and the demographic and economic characteristics of areas where low-tier ESHs are concentrated.

By utilizing Smith Travel Research (STR) data, U.S. Census Bureau statistics, Opportunity Atlas, and Eviction Lab datasets, we apply QGIS mapping methods to examine the clustering of low-tier ESHs nationwide. The results show that these hotels are increasingly concentrated in suburban and small metropolitan areas, diverging from historical trends that placed residential hotels in urban centers. Counties with high densities of low-tier ESHs tend to have younger, more racially diverse populations, lower homeownership rates, and fewer opportunities for upward mobility compared to national averages. The selected counties have higher bachelor level and above education attainment as well as higher poverty rates. This may suggest economic and societal polarization are features of counties with high concentrations of low-tier ESHs.

A major finding of the neighborhood analysis (tables 7 –9) is that ESH neighborhoods have similar AARP livability scores as the average United States neighborhood, with a few noticeable distinctions. They score five points higher for housing, with 44% of their housing stock being non-single family detached homes compared to the 18% average. This suggests that these neighborhoods are desirable neighborhoods for working class households. This may be due to the diverse labor opportunities (table 2), the compactness of jobs and people, and the increased proximity to grocery stores and parks (table 8). Neighborhoods with ESH proliferation are desirable enough for households to choose hotel residency, often with rent burden and without tenant protections, over leaving the neighborhood. These findings matter because they reveal that extended-stay hotels are not simply a marginal housing option; they are embedded in neighborhoods with both opportunities and risks, shaping

residents' daily access to jobs, services, and environmental quality. Understanding this landscape is critical for designing housing and health policies that close equity gaps rather than deepen them. Policy makers should prioritize housing production and hotel conversions to housing in these neighborhoods.

The neighborhood analysis also reveals ESH neighborhoods score over six points lower than average neighborhoods for transportation and environmental livability. Their drinking water has more violations, and they are 20% more proximate to roadway pollution. They have faster roads and higher crash mortality rates, and the low transportation score suggests less local public transit and walkability. As contemporary hotel housing is further embedded into the housing landscape, policy makers should consider traffic calming and increasing sidewalks and public transit stops in these neighborhoods. Environmental justice actors can also focus their efforts in these neighborhoods.

Gig work, seasonal work, pandemics, recessions, and natural disasters have increased demand for temporary housing. While some long-term hotel residents are transient workers, many are low-income individuals and families displaced by systemic inequities (Miller & Rayasam, 2024). Earning enough to afford the median rent in your neighborhood is not enough to access secure housing. Rental discrimination persists, where credit scores and eviction history have replaced the previous era's outright discrimination. The shortage of affordable housing empowers landlords to be highly selective and tenants to accept unfavorable circumstances. Conventional housing models often fail those without generational wealth or stable employment. For people without these privileges, hotel housing provides private shelter, though one marked by precarity and hardship.

Despite their growing role in housing, hotels remain largely excluded from housing policy. Thoughtful tenant protections are needed to prevent lock-outs, displacement and other hardships. One promising strategy is the establishment of tenant unions or organizing groups specifically for ESH residents, ensuring they have a collective voice in housing advocacy. Grassroots organizing models such as the Vancouver Tenant Union and the Los Angeles Tenant Union exemplify how tenant-led movements can influence housing policy and protect vulnerable renters. In Vancouver, the DTES SRO Collaborative has been active since approximately 2015, organizing initiatives such as Renter's Rights training and Tenant Overdose Response training for residents of single-room occupancy (SRO) hotels (DTES ARO, n.d.). Similarly, the Yarrow Society works with low-income seniors in Vancouver's Chinatown, providing culturally appropriate services—including language translation, medical appointment accompaniment, grocery assistance, and social networking—within senior-designated SROs (Yarrow Intergenerational Society for Justice, n.d.). These examples underscore the potential for community-based organizations to address the distinct challenges faced by residents in nontraditional and precarious housing settings.

The absence of tenant protections in the extended-stay hotel sector is not merely a regulatory gap but a defining feature of this housing model. Operators and investors benefit from the flexibility, rapid turnover, and limited oversight that hotels afford, distinguishing them from traditional rental markets (LSC, 2023). This unregulated status enables hoteliers to bypass landlord-tenant laws, eviction protocols, and housing codes, creating an

environment that is profitable because it is precarious. While stronger tenant protections might appear to be an intuitive solution, they carry the risk of triggering formal screening processes, including credit checks, background requirements, or lease agreements that could exclude the very populations most dependent on hotel housing. In this way, protective regulation may unintentionally replicate the barriers found in the formal housing market. Recognizing this tension is critical for policymakers aiming to intervene in a segment where housing need and market logic collide.

There are over 600,000 apartment-like ESH rooms in the United States with thousands more being built. As new hotels are built, municipalities across the country are increasingly acquiring and converting older hotel properties into affordable and supportive housing (Reid et al., 2021). A recent report found that hotel acquisition and conversion is both faster and less expensive than new affordable housing construction (Reid et al., 2021). Housing policy should support this strategy by allowing conventional affordable housing funds to be used for hotel conversions and by making converted hotels eligible for Housing Choice Vouchers and other subsidy programs.

Private sector profit is a key feature of affordable housing development in the United States. Given this reality, the hotel industry will continue to develop housing for resource constricted households. Research is needed to compare the construction, operations, and tenant well-being in apartment-style hotels versus traditional affordable housing models.

Further exploration through comparative analyses could provide valuable context, especially by comparing long-term hotel residents to traditional low-income renters. Additionally, investigating how local policies—such as zoning laws, short-term rental regulations, or housing assistance programs influence extended stay hotel prevalence could help clarify the role these establishments play in the broader housing landscape. Finally, future work should seek to incorporate additional intersecting identities, including disability status and transgender/non-binary representation, to further contextualize patterns of housing need and exclusion.

While this study offers valuable exploratory insights into the spatial distribution and characteristics of low-tier extended-stay hotels (ESHs), several limitations must be acknowledged. First, our mapping analysis only includes low-tier extended-stay hotels. Economy hotels and low-tier all-suite hotels, especially aged properties, are also used for housing. These hotels were not mapped, perhaps hiding areas in the United States where hotel housing is prominent, but not saturated with ESHs yet. Additionally, the neighborhood analysis represents only 67% of all low-tier ESHs. Discrepancies in geocoding may have resulted in missing or misclassified locations, which could slightly affect geographic patterns.

Furthermore, this study is descriptive, indicating that it does not establish causal or significant relationships between the presence of ESH and neighborhood characteristics. Future research should examine the underlying factors that drive the clustering of low-tier ESHs in particular areas and evaluate the long-term economic and social outcomes for residents.

In conclusion, more qualitative research would provide a deeper understanding of the lived experiences of hotel residents. Previous studies of hotel residents in metropolitan Atlanta revealed that hotels were primarily considered a last-resort housing option after evictions, job loss, or financial instability (Lewinson & Collard, 2012). While participants initially viewed hotels as a temporary solution to save money or rebuild credit, many found themselves stuck in extended-stay living for months, with limited pathways to permanent housing. Future interviews or ethnographic studies could further investigate these themes, shedding light on the economic and social trade-offs associated with hotel living. Additionally, involving extended-stay hotel residents in community-based participatory research could provide valuable insights into the environmental and health concerns unique to hotel housing. Such research would not only enhance the understanding of hotels as a housing form but also inform policies and interventions that directly address residents' needs, ensuring that those relying on hotels for shelter are no longer overlooked in housing policy discussions.

Positionality Statement

This research is informed by the first author's personal and professional perspective as a white, gay, cisgender male with a master's-level education working in the field of public sector affordable housing development. Renting in New York City, the author experienced firsthand how privilege and capital beyond monthly rent payments are prerequisites to accessing secure housing. The author's interest in hotel housing began in December 2020, when he met his father in Atlanta, Georgia, during winter break from his graduate program in Milan, Italy. His father, volunteering as a poll watcher for the Democratic Party in the 2020–21 Senate election, was temporarily staying at a budget extended-stay hotel in the city's exurbs, where the author joined him for a long weekend. The hotel—isolated along a highway with no sidewalks or neighborhood amenities—was mostly booked by local families, not businesses or leisure travelers, as places to live. A brief online search revealed that thousands of families lived in hotels throughout metro Atlanta and the U.S., yet this housing reality remained largely unrecognized and poorly understood. In need of a thesis topic for his master's in urban planning, he started researching this phenomenon and found that secure, dignified housing is both fundamental to societal well-being and consistently undersupplied – even for households working full-time. He now develops low-income senior housing for the New York City Department of Housing Preservation and Development (HPD) and believes hotel housing may play a significant role in 21st century housing. His social location as someone who has benefitted from stable housing, higher education, and institutional access informs both the questions he asks and the critical lens he applies to housing precarity.

Recognizing that hotel housing disproportionately affects communities marginalized by race, class, immigration status, age, gender identity and disability, the author has approached this research with an awareness of his own privilege and a commitment to amplifying the lived experiences of residents often excluded from formal housing policy discussions. This

study affirms that structural conditions, not individual deficits, are the primary drivers of housing insecurity and hotel living.

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