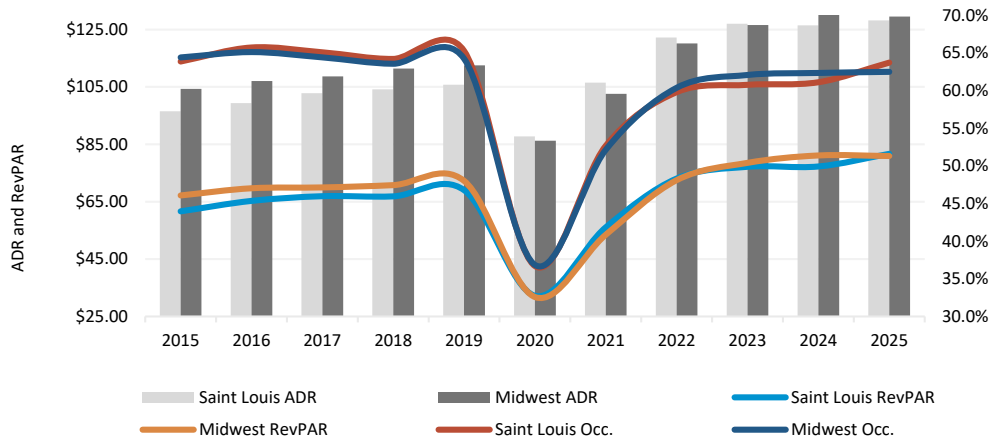


# Saint Louis Hotel Market

## Market Operating Performance

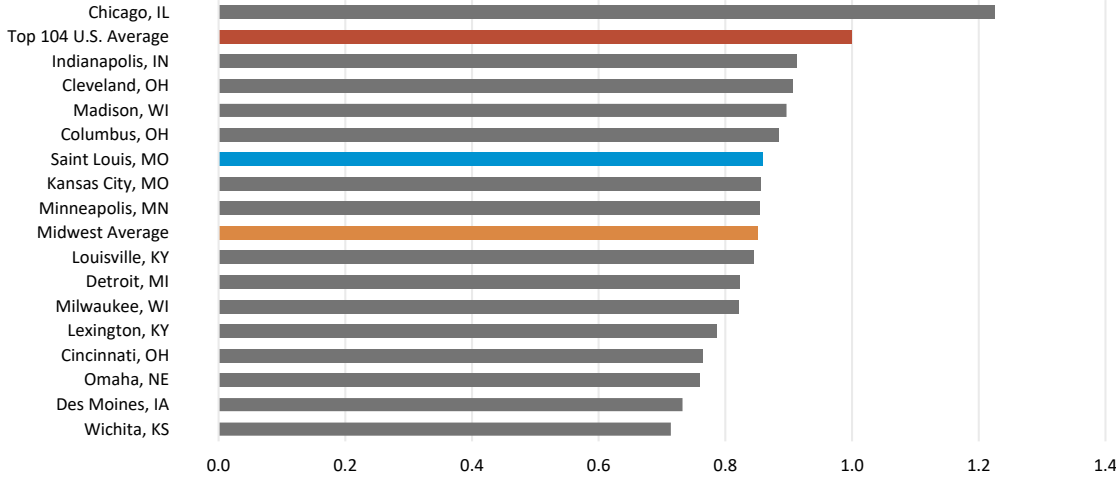
Midwest Market includes 16 major cities in Illinois, Indiana, Iowa, Kansas, Kentucky, Michigan, Minnesota, Missouri, Nebraska, Ohio, and Wisconsin.



YTD % Change	
Saint Louis RevPAR	4.8%
Midwest RevPAR	-0.7%
Top 104 U.S. Markets RevPAR	-1.2%

Data Source: Kalibri Labs

## RevPAR Performance Index



6<sup>th</sup> out of 16  
RevPar Index: 0.860

Data Source: Kalibri Labs

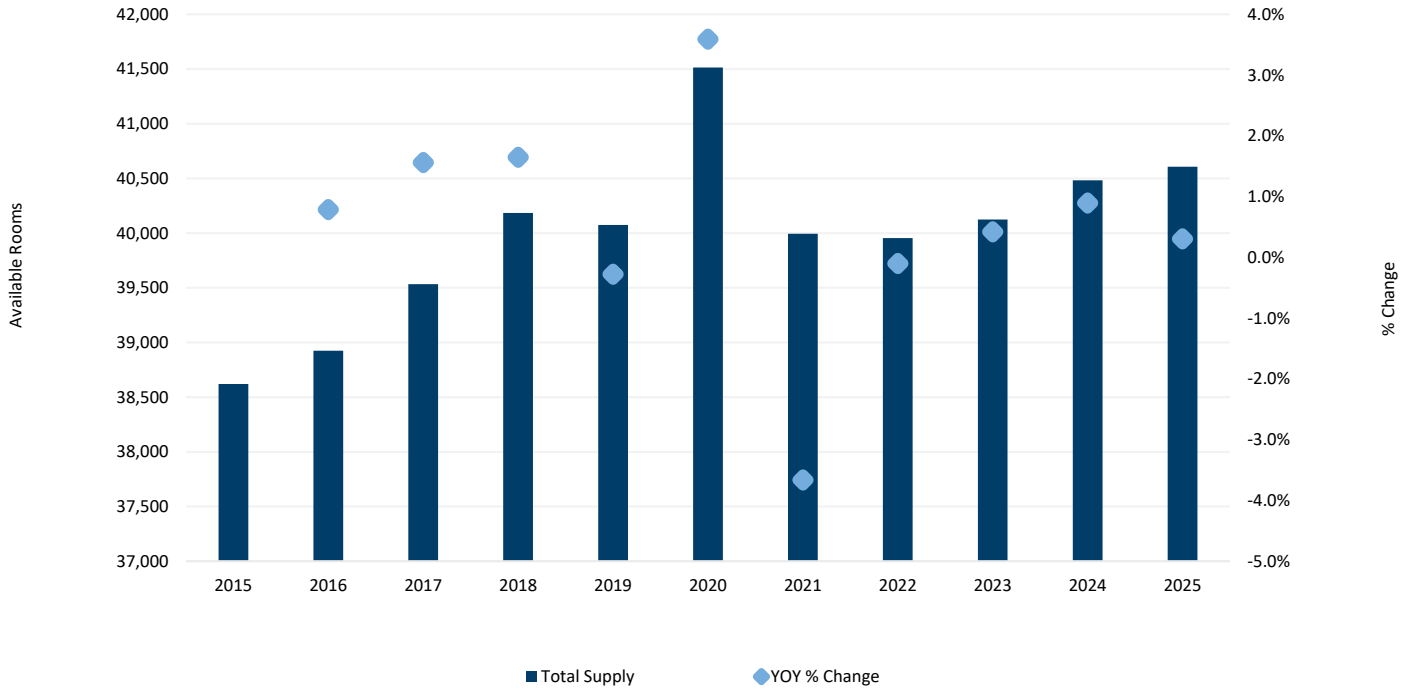
The RevPAR Performance Index compares each Midwest market's year-to-date RevPAR to the U.S. Top 104 markets' year-to-date RevPAR. The baseline of 1.0 represents the average year-to-date RevPAR of the top 104 U.S. hotel markets. A market with an average index above 1.0 indicates year-to-date RevPAR above the top 104 markets' average, and a market with an index below 1.0 indicates year-to-date RevPAR below the top 104 markets' average.

<p><b>Brent Mertz, MAI</b> Senior Vice President 785-218-9599 brent.mertz@nrmk.com</p>	<p><b>John Burke</b> Senior Vice President 843-813-3265 john.burke@nrmk.com</p>	<p><b>Alexandra Chapekis, CHIA</b> Vice President 216-453-3035 alexandra.chapekis@nrmk.com</p>
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# 4Q 2025 HOTEL MARKET REPORT

## Market Supply Overview

Available Rooms Historical Supply Trends



Data Source: Kalibri Labs

### Saint Louis Market Supply Update

Property	City	Room Count	Date	Developer
AC Hotel St. Louis Chesterfield	Chesterfield, MO	128	Mar 2022	Great Lakes Capital Development
Home2 Suites St. Louis Downtown Dual-branded Hotel	Saint Louis, MO	126	May 2022	Reimagine Hospitality
Tru St. Louis Downtown Dual-branded Hotel	Saint Louis, MO	75	May 2022	Reimagine Hospitality
Residence Inn Clayton	Clayton, MO	170	May 2023	Midas Hospitality LLC
21c Museum Hotel St Louis MGallery by Sofitel	Saint Louis, MO	173	Jul 2023	21c Museum Hotels
Urban Collective Boutique Hotel	Edwardsville, IL	8	Jul 2023	-
TownePlace Suites Wentzville	Wentzville, MO	95	Mar 2024	Midas Hospitality LLC
Holiday Inn Express Alton - St Louis Area (2008 Home Adams Pkwy)	Alton, IL	90	Jul 2024	Amerilodge Group
AC Hotel St. Louis Clayton	Clayton, MO	207	Oct 2024	HomeBase Partners
Hampton Inn & Suites St. Louis Airport	Saint Louis, MO	128	Mar 2025	Lodging Hospitality Management
WoodSpring Suites St Peters O'Fallon	St. Peters, MO	122	Oct 2025	-
SpringHill Suites St. Louis Chesterfield	Chesterfield, MO	88	Feb 2026	Otis & Clark Properties
AC Hotel St. Louis Downtown (415 N Tucker Blvd)	Saint Louis, MO	225	Mar 2026	Alterra Worldwide
Hampton Inn & Suites Festus (199 Shapiro Dr)	Festus, MO	93	Q3 2026	Crown Hospitality LLC
Cambria Suites (210 Rush Way)	O'Fallon, MO	118	Q3 2026	Baldwin Development
Hampton Inn Warrenton I-70	Warrenton, MO	80	Q3 2026	SAMP Hospitality LLC
Tru Hotel (711 Kingsland Ave)	University City, MO	108	Q4 2026	Tristar Properties
Home2 Suites (357 Regency Park)	O'Fallon, IL	108	Q4 2026	Commercial Property Investors
SpringHill Suites O'Fallon (724 W Highway 50)	O'Fallon, IL	103	Q1 2027	Beltone
Hampton Inn & Suites Sunset Hills St Louis (3660 S. Lindbergh)	Saint Louis, MO	90	Q1 2027	Brentwood Hotels

Data Source: Newmark Valuation & Advisory

## 4Q 2025 HOTEL MARKET REPORT

### Saint Louis Market Supply Update

Property	City	Room Count	Date	Developer
Tapestry Saint Louis (205 North 9th Street)	Saint Louis, MO	161	Q4 2027	St. Louis Development Corporation
Home2 Suites Fenton St. Louis (650 S Highway Dr)	Fenton, MO	98	Q4 2027	Premier Hotel Properties
Park North Hotel	Edwardsville, IL	99	Proposed	Pangea Development LLC
Kimpton St. Louis Downtown West Dual-branded Hotel (2601 Market St)	Saint Louis, MO	170	Proposed	Green Street Real Estate Ventures, LLC
Staybridge Suites Downtown West Dual-branded Hotel (2601 Market St)	Saint Louis, MO	129	Proposed	Green Street Real Estate Ventures, LLC
Element Saint Charles Riverpointe (1432 S Main St)	Saint Charles, MO	78	Proposed	Raj Clement
AC Saint Charles Riverpointe (1430 S Main St)	Saint Charles, MO	106	Proposed	Raj Clement
Atwell Suites	Fenton, MO	104	Proposed	Admiral Parkway Inc.
Sheraton Hotel St Louis Downtown (rebranding of OYO)	Saint Louis, MO	216	Proposed	Midas Capital
aloft St. Louis West (1142 S Brentwood Blvd)	Richmond Heights, MO	127	Proposed	Midas Hospitality LLC
Home2 Suites Maryland Heights Westport (12131 Dorsett Rd)	Maryland Heights, MO	115	Proposed	SINA Hospitality
Hampton Inn (Technology Drive)	O'Fallon	80	Proposed	Midwest Hotel Construction, LLC
Courtyard by Marriott (Delmar Blvd & Kingshighway Blvd)	Saint Louis, MO	100	Proposed	Kingsway Development
Drury Hotel	O'Fallon, MO	200	Proposed	Drury Hotels Company, LLC
StayAPT Suites (1010 S Linn Avenue)	Wentzville, MO	88	Proposed	Benton Homebuilders
The Pacific School Hotel (413 W Union St)	Pacific, MO	22	Proposed	Tristar Companies
TownePlace Suites Saint Charles (320 Sandra Ave.)	Saint Charles, MO	93	Proposed	Boones Lick Development LLC
Fairfield Inn & Suites Saint Charles (1410 S 5th St.)	Saint Charles, MO	93	Proposed	-
Home2 Suites Wentzville	Wentzville, MO	99	Proposed	Roshan Patel
Home2 Suites Edwardsville Dual-branded Hotel	Edwardsville, IL	80	Proposed	R.L.P. Development Company
Tru Edwardsville Dual-branded Hotel	Edwardsville, IL	68	Proposed	R.L.P. Development Company
Hampton Inn (942 S. Highway Dr.)	Fenton, MO	92	Proposed	-
The Armory Hotel	Saint Louis, MO	135	Proposed	Green Street Real Estate Ventures
Everhome Suites St. Peters (7870 Veterans Memorial Pkwy)	Saint Peters, MO	122	Proposed	Genesis Companies
Motel 6	Mascoutah	77	Proposed	Hayden Properties
The International (4494 Lindell)	Saint Louis, MO	115	Proposed	Versa Development
Courtyard by Marriott Olivette	Olivette, MO	128	Proposed	Keeley Properties
Holiday Inn Express & Suites Granite City (4125 Timberlake Dr)	Granite City, IL	87	Proposed	VP Hospitality
Candlewood Suites Earth City - St. Louis	Earth City, MO	71	Proposed	-
TownePlace Suites O'Fallon (1001 Bryan Rd)	O'Fallon, MO	85	Proposed	-
Fairfield Inn & Suites STL	Saint Louis, MO	89	Proposed	OHM Hotel Group

### ABOUT HOSPITALITY, GAMING & LEISURE

Our Hospitality, Gaming & Leisure practice is focused exclusively on providing superior valuation and consulting services for a broad range of hotels, casinos and leisure properties. Our team takes a holistic, consultative approach that goes far beyond the physical asset, analyzing every aspect of a property's business and real estate operations to identify all areas of value for owners and investors.

*Our Hospitality, Gaming & Leisure platform has experience in valuation assignments and market analysis for properties including:*

**Hotels and Resorts**

**Gaming Facilities**

**Stadiums, Sports  
& Entertainment  
Facilities**

**Conference, Expo  
& Convention  
Centers**

**Golf Courses**

**Marinas**

**Ski and Village  
Resorts**

**Water Parks,  
Amusement Parks  
& Attractions**

Data Source: Newmark Valuation & Advisory

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