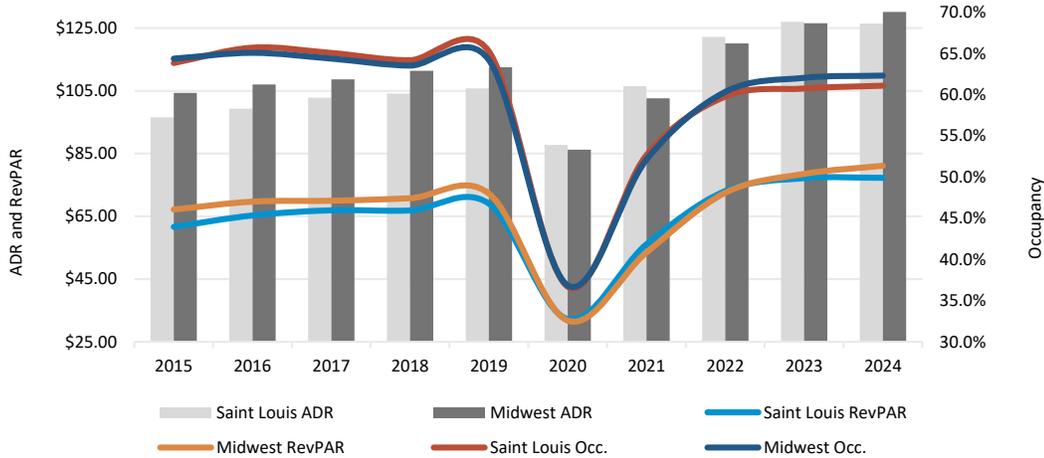


Saint Louis Hotel Market

Market Operating Performance

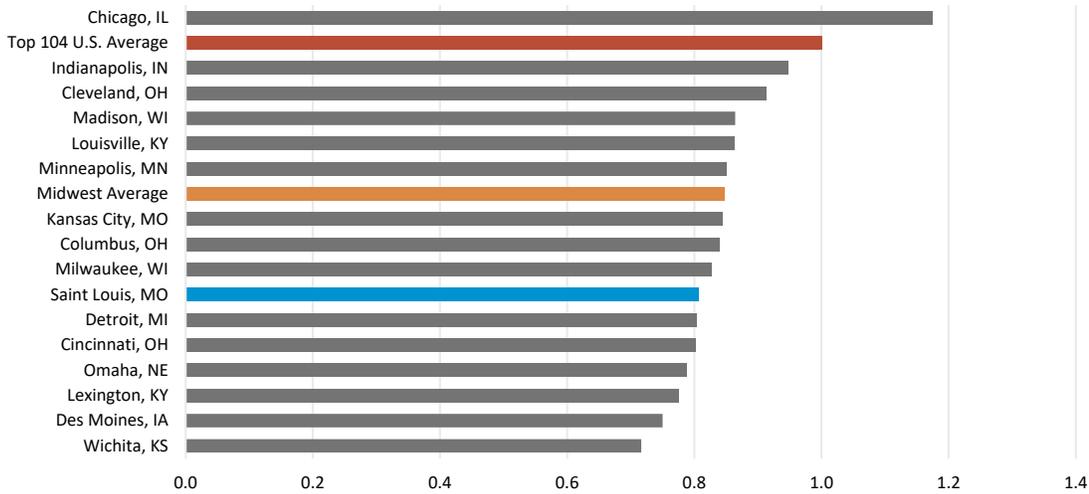
Midwest Market includes 16 major cities in Illinois, Indiana, Iowa, Kansas, Kentucky, Michigan, Minnesota, Missouri, Nebraska, Ohio, and Wisconsin.



YTD % Change	
Saint Louis RevPAR	0.1%
Midwest RevPAR	3.3%
Top 104 U.S. Markets RevPAR	1.2%

Data Source: Kalibri Labs

RevPAR Performance Index



10th out of 16
RevPar Index: 0.807

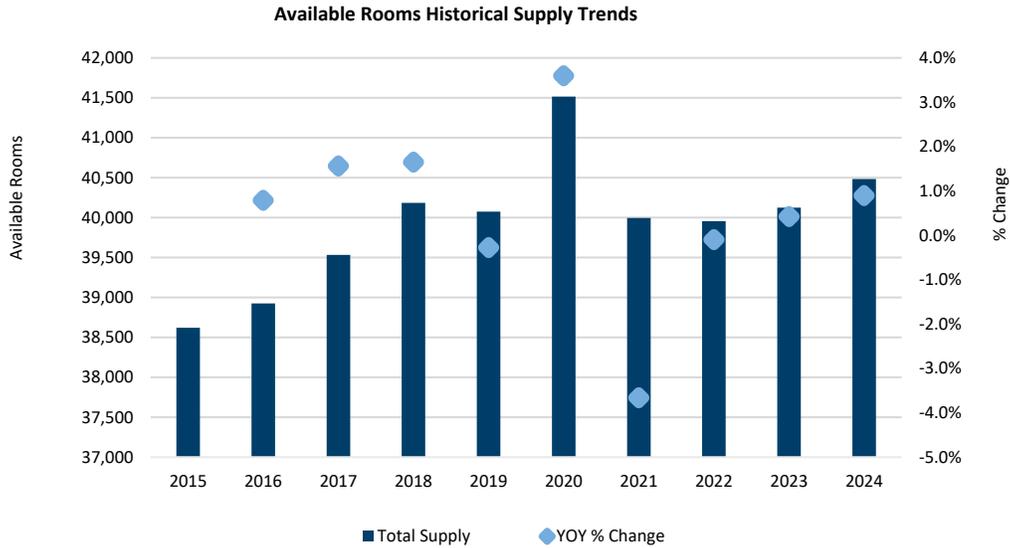
Data Source: Kalibri Labs

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.

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4Q 2024 HOTEL MARKET REPORT

Market Supply Overview



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 (10330 Natural Bridge Rd)	Saint Louis, MO	128	Q2 2025	Lodging Hospitality Management
SpringHill Suites Chesterfield Dual-branded Hotel (1065 E. Chesterfield Pkwy)	Chesterfield, MO	88	Q3 2025	Otis & Clark Properties
AC Hotel - Jefferson Arms Redevelopment (415 N Tucker Blvd)	Saint Louis, MO	225	Q3 2025	Alterra Worldwide
Tapestry Saint Louis (205 North 9th Street)	Saint Louis, MO	161	Q3 2025	St. Louis Development Corporation
Home2 Suites Fenton St. Louis (650 S Highway Dr)	Fenton, MO	98	Q3 2025	Premier Hotel Properties
Park North Hotel	Edwardsville, IL	99	Q2 2026	Pangea Development LLC
Cambria Suites (210 Rush Wy)	O'Fallon, MO	118	Q2 2026	Baldwin Development
Kimpton St. Louis Downtown West Dual-branded Hotel (2601 Market St)	Saint Louis, MO	170	Q3 2026	Green Street Real Estate Ventures, LLC
Staybridge Suites Downtown West Dual-branded Hotel (2601 Market St)	Saint Louis, MO	129	Q3 2026	Green Street Real Estate Ventures, LLC
Apartments by Marriott Bonvoy St. Louis Downtown (rebranding of OYO)	Saint Louis, MO	50	Proposed	Midas Capital
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 & Suites Sunset Hills St Louis (3660 S. Lindbergh)	Saint Louis, MO	88	Proposed	Brentwood Hotels
Hampton Inn (Technology Drive)	O'Fallon, IL	80	Proposed	Midwest Hotel Construction, LLC
Courtyard by Marriott (Delmar Blvd & Kingshighway Blvd)	Saint Louis, MO	100	Proposed	Kingsway Development

Data Source: Newmark Valuation & Advisory

4Q 2024 HOTEL MARKET REPORT

Saint Louis Market Supply Update

Property	City	Room Count	Date	Developer
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
Tru Hotel (711 Kingsland Ave)	University City, MO	108	Proposed	Tristar Properties
Home2 Suites (357 Regency Park)	O'Fallon, IL	108	Proposed	Commercial Property Investors
Home2 Suites Wentzville	Wentzville, MO	99	Proposed	Roshan Patel
Home2 Suites Edwardsville Dual-branded Hotel	Edwardsville, IL	80	Proposed	R.L.P. Development Company
Hilton Garden Inn Edwardsville Dual-branded Hotel	Edwardsville, IL	80	Proposed	R.L.P. Development Company
The Beacon on Chestnut	Saint Louis, MO	300	Proposed	Advantes Development
SpringHill Suites O'Fallon	O'Fallon, IL	103	Proposed	Beltone
The Armory Hotel	Saint Louis, MO	135	Proposed	Green Street Real Estate Ventures
Everhome Suites	Saint Peters, MO	50-100	Proposed	Genesis Companies
The International (4494 Lindell)	Saint Louis, MO	115	Proposed	Versa Development



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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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