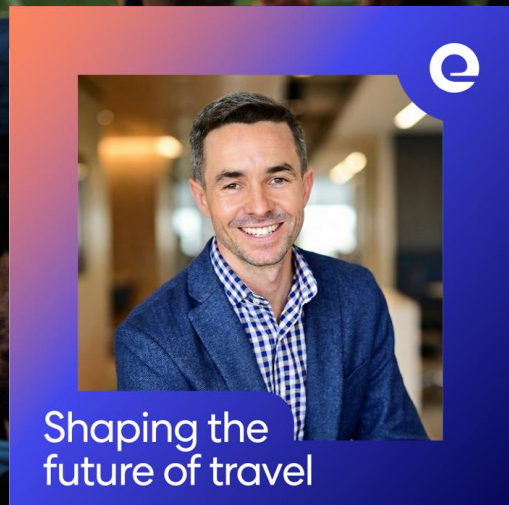


Post-Draw Soccer Analysis



Daniel McDonagh

Expedia Senior Market
Manager

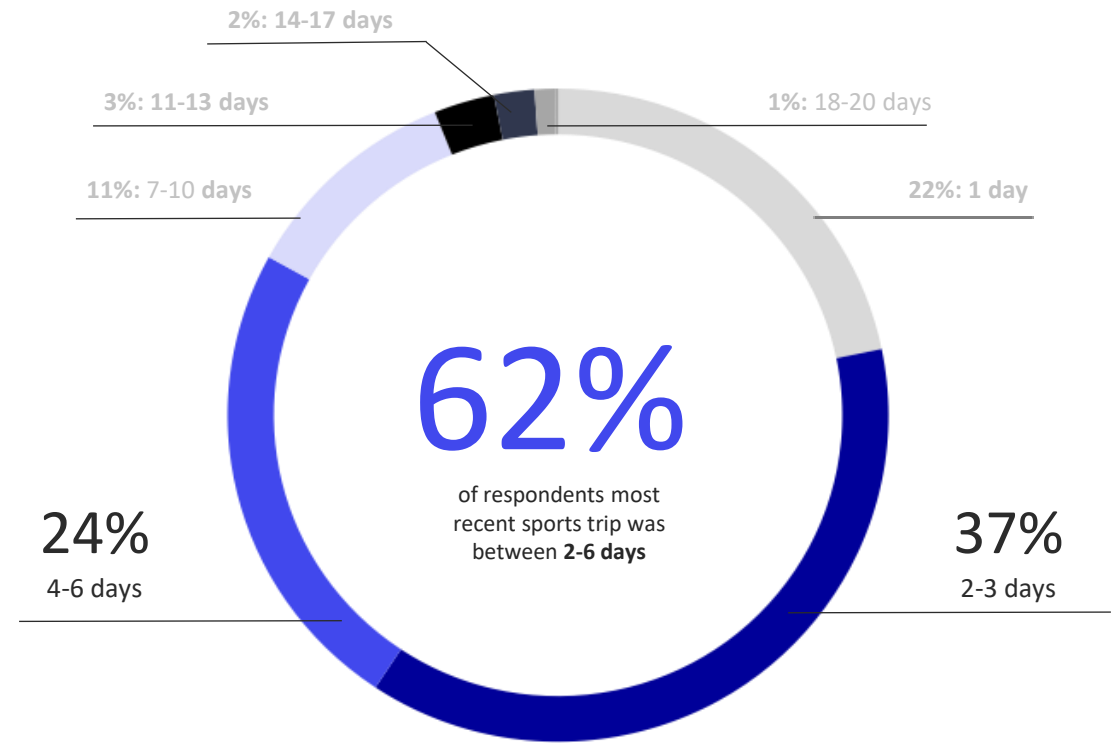
What were the final results?

- **Major Transient Share Gain vs 2016**
 - Peak Saturday, group was 57% vs 74% in 2016
 - Transient share almost doubled to 30% on Friday vs 14.6% in 2016
- **Occupancy (Mon – Sat)**
 - 2016 86,4%
 - 2026 84.5% (-2.2%)
- Bay Area saw the **highest ADR YoY%** vs previous SB markets through Expedia.

Our travelers extend their stay beyond the match.

81%

visited another destination outside the main event.



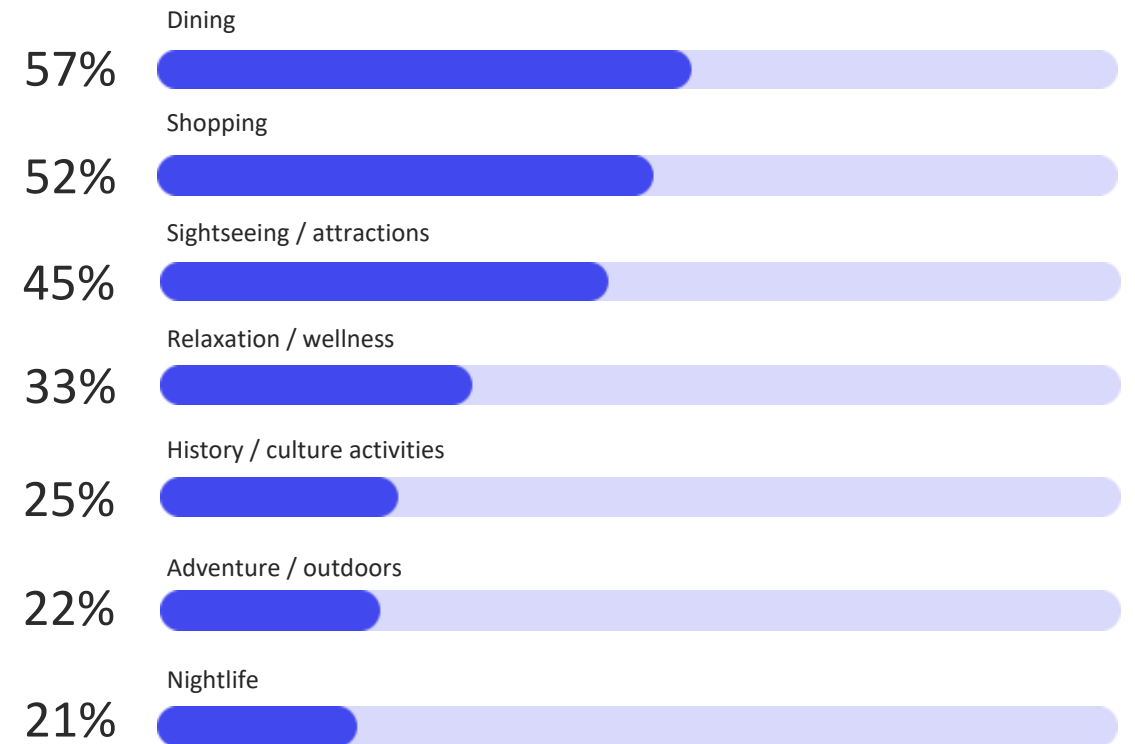
Prefer medium-length trips, with many attending multi-day events.

What our audience values most

Priorities beyond the tournament



Activities outside the tournament



Key Dates for California

Game	Date	Location
------	------	----------

Group Stage games

Game 4	June 12	Los Angeles – USA
Game 8	June 13	Santa Clara Qatar vs Switzerland
Game 15	June 15	Los Angeles
Game 20	June 16	Santa Clara Austria vs Jordan
Game 26	June 18	Los Angeles
Game 31	June 19	Santa Clara Paraguay vs Euro Winner
Game 39	June 21	Los Angeles
Game 44	June 22	Santa Clara Jordan vs Algeria
Game 59	June 25	Los Angeles – USA
Game 60	June 25	Santa Clara Paraguay vs Australia

Round of 32

Game 73	June 28	Los Angeles
Game 81	July 01	Santa Clara
Game 84	July 02	Los Angeles

Quarter Finals

Game 98	July 10	Los Angeles
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Top Trending Football Cities



With group stage match ups now confirmed, Expedia reveals the latest insights on the surging travel demand, as fans plan their North American trips:

Host Cities Trending upwards*

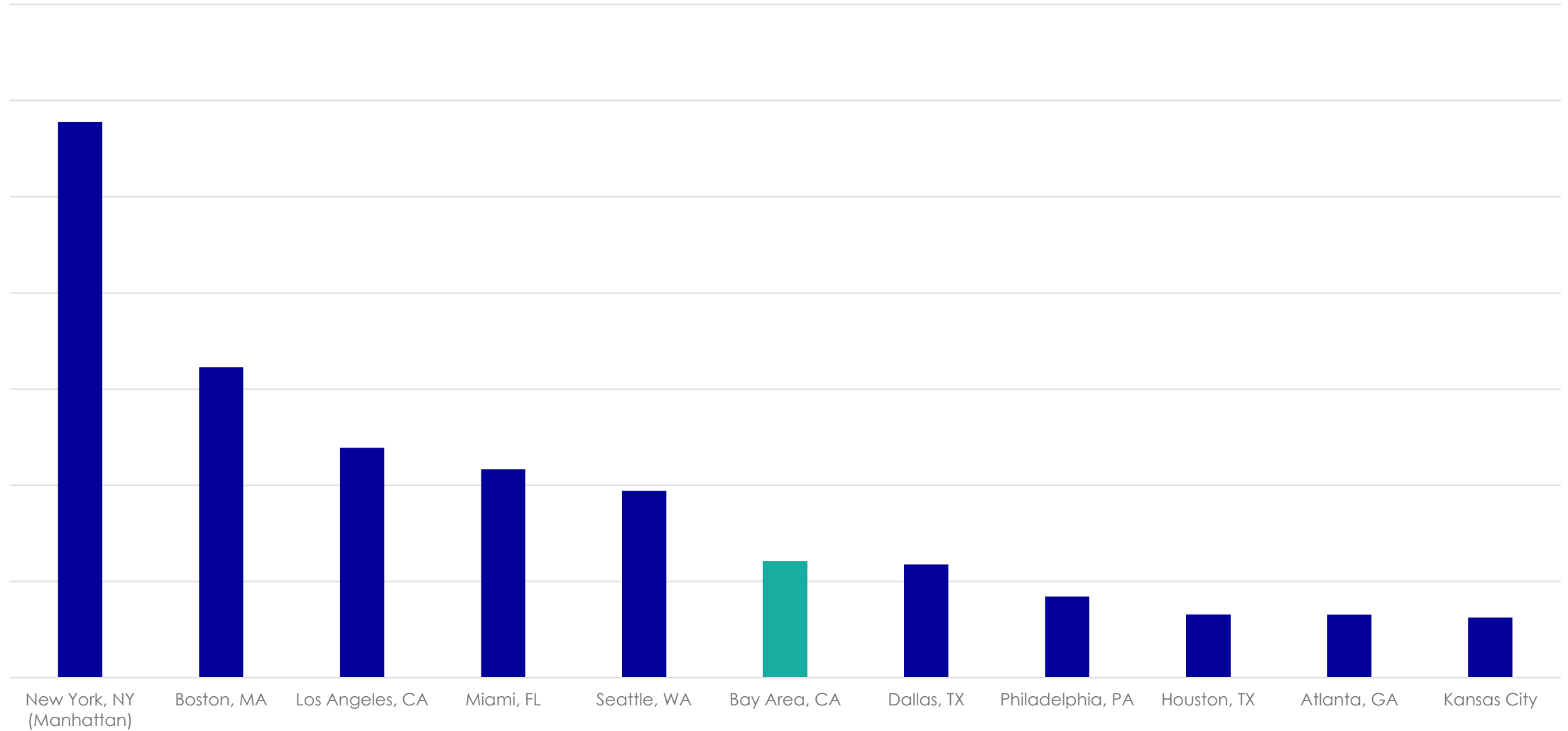
1. Boston +1000%
2. Dallas +900%
3. Kansas City +640%
4. Philadelphia +530%
5. Guadalajara +470%
6. Houston +375%
7. Monterrey +270%
8. Miami +260%
9. Atlanta +240%
10. Toronto +220%
11. Mexico City +150%
12. New York +120%
13. Seattle +85%
14. Vancouver +75%
15. Los Angeles +65%

16. San Francisco +10%

* based on lodging searches made on Expedia global from 5 – 8 December 2025 compared to 30 November 2025 – 1 December 2025

** Based on flight searches made on Expedia global from 5 – 8 December 2025 compared to 30 November 2025 – 1 December 2025. For group stage travel between 11 – 27 June 2026 to New York, Boston, Philadelphia, Los Angeles, Miami, Houston, Atlanta, Dallas, Seattle, Kansas City, San Francisco, Toronto, Vancouver, Monterrey, Mexico City & Guadalajara.

Bay Area Production vs US Host Cities



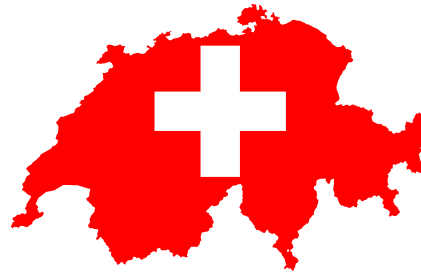
What Teams You Should Pay Attention To

Top National Teams Coming to the Bay Area

#1 Australia



#2 Switzerland



#3 Austria



*Teams that could still qualify from the UEFA Playoff Path C Winner:

Turkiye, Romania, Slovakia, Kosovo

Teams pending qualification will be confirmed on March 31st, 2026.



Cancellations Starting to Normalize

28%

San Francisco
-20pp%

31%

Silicon Valley
-25pp%

24%

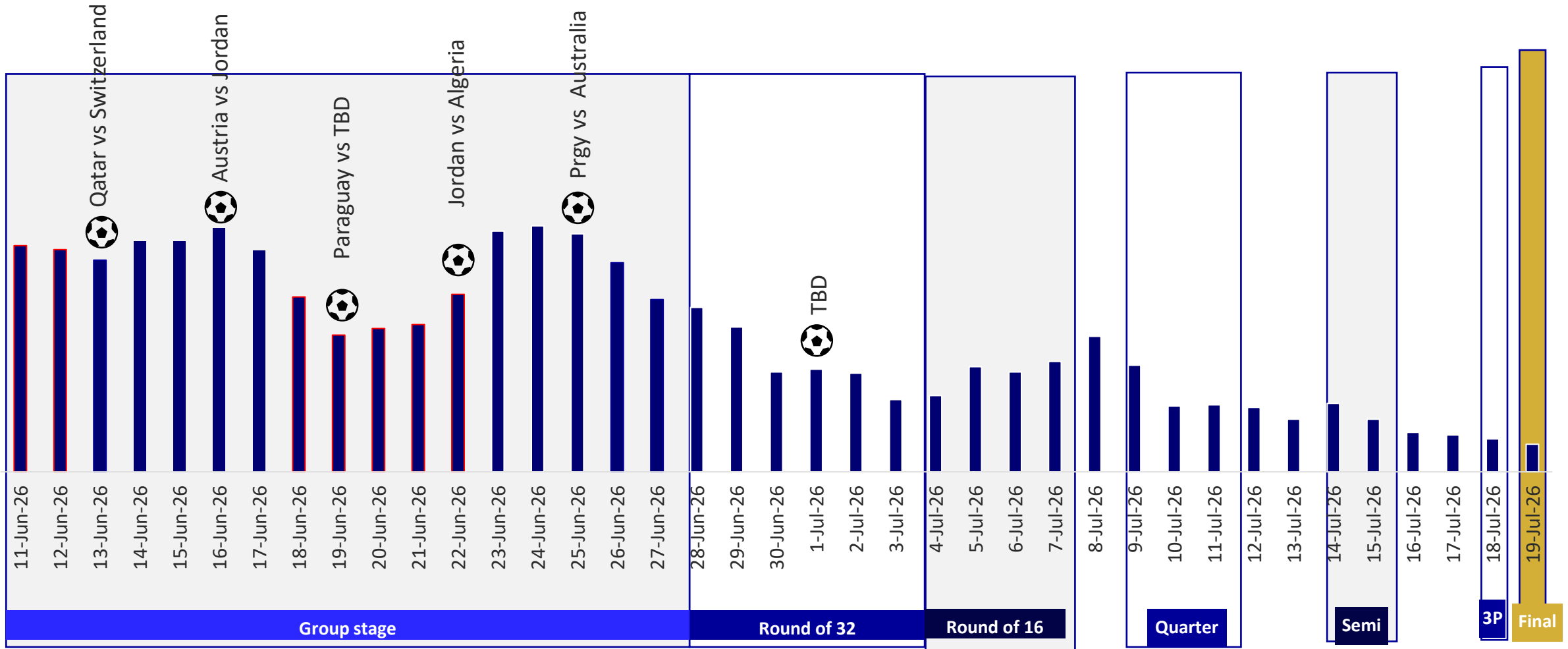
SFO
-20pp%

Impact of Team Draw

Searches for Levi's Stadium, CA

The screenshot shows the Expedia search interface for Levi's Stadium, CA, from Wednesday, June 24 to Friday, June 26, for 2 travelers in 1 room. The search results list several properties, including Avatar Hotel Santa Clara, Tapestry Collection by Hilton (8.6 rating, \$549 nightly), HYATT house San Jose/Silicon Valley (9.2 rating, \$592 nightly), and Radisson Hotel Sunnyvale – Silicon Valley. A blue callout box in the center of the screen contains the text: "Expedia experienced a notable boost in inventory post draw. San Francisco and Silicon Valley rank among the top three of all 16 host markets in total available inventory." To the right of the callout is a map of the San Francisco Peninsula with price markers for various locations: San Jose (\$1,909), Fremont (\$1,794), Newark (\$3,562), Hayward (\$4,119), San Bruno (\$1,471), San Bruno (\$2,706), San Bruno (\$498), San Bruno (\$1,320), San Bruno (\$992), San Bruno (\$2,395), and San Bruno (\$700). The map also shows various parks and wilderness areas like Russian Ridge Open Space Preserve and Blue Oak Ranch Reserve.

Traveler Demand into the Bay Area



Source: Expedia Group Traveler Intent L28D YoY From 2/11/26

Who is traveling into the Bay Area?

Capture higher value travelers

Country	Share
Australia	16.7%
China	12.3%
Brazil	7.3%
Germany	6.8%
Canada	6.8%
Switzerland	5.4%
Italy	5.0%
UK	4.7%
Japan	4.2%
Mexico	3.4%



Package

Demand Share: 31%

Average LOS: 2.9

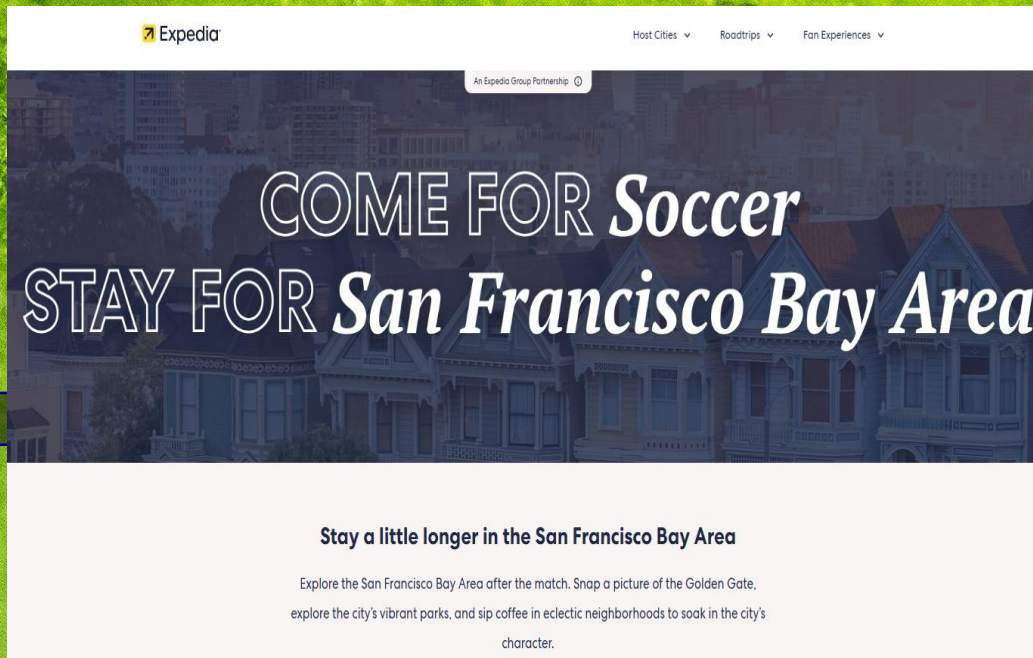


International

Demand Share: 42%

Average LOS: 3.1

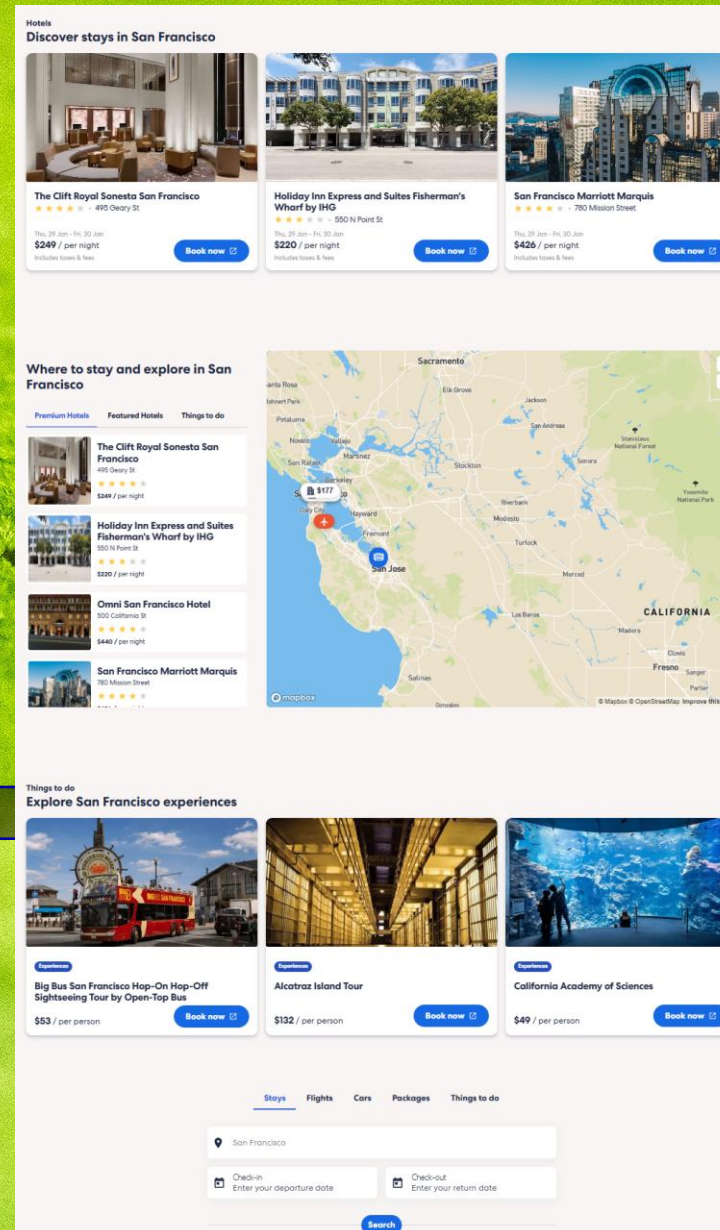
How is EG driving demand?



COME FOR Soccer
STAY FOR San Francisco Bay Area

Stay a little longer in the San Francisco Bay Area

Explore the San Francisco Bay Area after the match. Snap a picture of the Golden Gate, explore the city's vibrant parks, and sip coffee in eclectic neighborhoods to soak in the city's character.



Hotels
Discover stays in San Francisco

- The Clift Royal Sonesta San Francisco**
4.5 stars • 495 Deary St.
Thu, 28 Jan - Fri, 30 Jan
\$249 / per night
- Holiday Inn Express and Suites Fisherman's Wharf by IHG**
4.0 stars • 550 N Point St.
Thu, 28 Jan - Fri, 30 Jan
\$220 / per night
- San Francisco Marriott Marquis**
4.5 stars • 780 Mission Street
Thu, 28 Jan - Fri, 30 Jan
\$426 / per night

Where to stay and explore in San Francisco

Things to do
Explore San Francisco experiences

- Big Bus San Francisco Hop-On Hop-Off Sightseeing Tour by Open-Top Bus**
\$53 / per person
- Alcatraz Island Tour**
\$132 / per person
- California Academy of Sciences**
\$49 / per person

Search filters: Stays, Flights, Cars, Packages, Things to do

Search location: San Francisco
Check-in: Enter your departure date
Check-out: Enter your return date



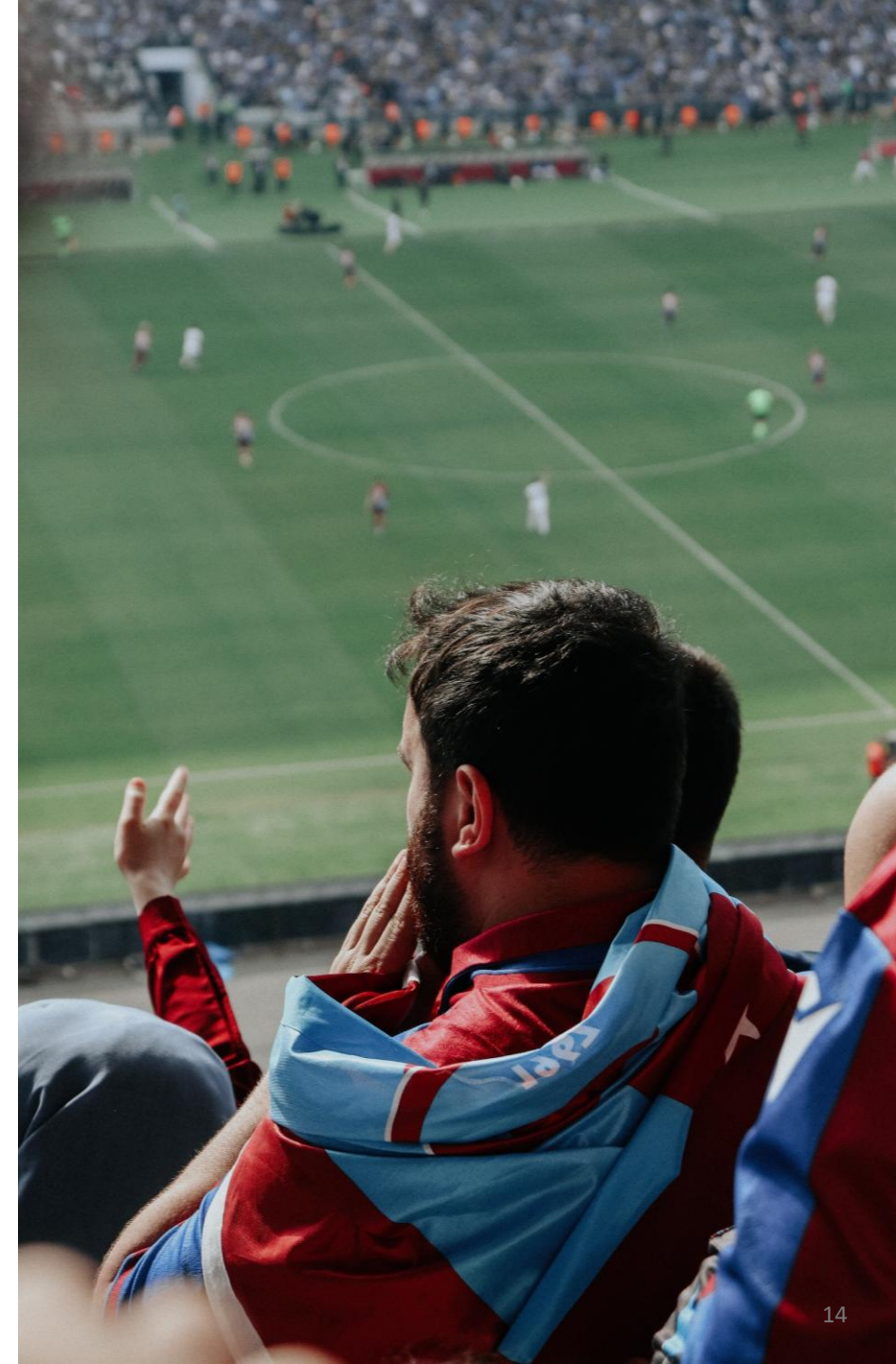
How to help your property score big for the Big Soccer Tournament

01 Incentivize Package & International Travelers

How are you differentiating yourself vs your competitors?

02 Focus on Visibility & Marketing

How can you make your hotel standout in a saturated market?





Thank You