

# The World Cup host markets that could see the biggest swings in hotel demand

Leisure destinations, smaller markets stand to gain the most, Tourism Economics says



Mexico will co-host the 2026 FIFA World Cup with the U.S. and Canada between June 11 and July 19. The first game in Mexico City will be played at Azteca Stadium on June 11. (Getty Images)

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Already popular leisure destinations and smaller host cities are expected to be the hotel markets with the most to gain from the 2026 FIFA World Cup.

Mexico City, New York, Kansas City and Los Angeles lead the way as the markets with the most favorable factors to see outsize hotel demand during the World Cup, according to a report from Tourism Economics. The report considered five factors: team schedules, which is pending the release of the draw on Dec. 5; match characteristics; stadium profile; destination profile; and operations.

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## Team schedules

Hoteliere in host markets across North America are patiently awaiting the release of the World Cup tournament draw on Dec. 5, which will reveal where each qualifying country will play their group-stage matches. This will be the largest World Cup in history both in terms of the field of teams — 48 — and total matches — 104.

Fans traveling from England, France, Brazil, Argentina and Portugal are expected to have the largest impact on hotel market performance. Tourism Economics analyzed historical visitation levels, social media followers, attendance at the 2022 World Cup and current FIFA rankings to measure which countries will be likely to drive hotel demand.

"Specifically, we expect significant impacts to be driven by teams with large and fervent fan bases, especially those that have a high propensity to travel to host cities, whether as international inbound trips or domestic trips by residents within the host cities, whether as international inbound trips or domestic trips by residents within the host countries," the report states.

Small countries that qualify for the tournament will also have an impact, as making the World Cup is viewed as a significant achievement for them.

## Match characteristics

Dallas, Miami and New York have the best combination of total matches and matches in the knockout rounds of the tournament, according to the report, which should allow these markets to fill more hotel rooms and push average daily rate.

Each of the 16 markets will host at least three group-stage matches, and with the exception of Guadalajara, Mexico, each market will host at least one knockout-stage match. As the knockout round narrows down the field as the tournament moves on, markets that host several of these matches scored higher in this category.

New York City, for example, will host five group-stage matches along with three knockout-stage matches, including the gold medal final.

## Stadium profile

Although the sheer gravity of an event such as the World Cup will bring visitors to the host markets, those with larger stadium sizes can lend more opportunities for people to actually attend these matches, which is expected to lead to hotel demand.

Dallas' AT&T Stadium has the highest capacity of the host markets at 94,000. Mexico City's Estadio Banorte and New York City's MetLife Stadium round out the top three with a capacity of more than 80,000. Vancouver, Monterrey, Guadalajara and Toronto are on the other side of the scale, with a capacity under 60,000.

The location of the stadium in relation to the market's central business district or downtown area will also play a factor when it comes to hotel demand. Tourism Economics listed Atlanta, Monterrey, Philadelphia, Seattle, Toronto and Vancouver as markets that are expected to benefit from their stadium's location.

Markets with fewer total hotel rooms — such as Toronto, Seattle, Vancouver, Boston and Kansas City — will likely see a larger impact from the World Cup in regard to market-level revenue per available room growth over the prior year. Large markets

such as New York City, Los Angeles, Atlanta, Dallas and Houston will still see a significant impact from the World Cup, but it won't be as pronounced of a RevPAR percentage change year over year.

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#### Destination profile

World Cup fans are likely to show a particular interest in markets that are recognized as major leisure destinations, such as New York City, San Francisco, Los Angeles, Vancouver and Mexico City, according to Tourism Economics' report.

Markets that typically receive a lot of seasonal demand in June such as New York, Vancouver, Toronto, Boston and Seattle will be able to push ADR and will only experience a moderate impact from displacement and deferred visitor effects, since occupancy was already expected to be high.

Markets that typically see low occupancy rates in June such as Houston, Los Angeles and Miami will see a huge gain in occupancy but the impact on ADR will be more subdued due to fewer periods of high compression.

"While seasonality will impact hotel performance, the instance of a market experiencing compression – therefore, very robust RevPAR growth in percentage terms – will also be influenced by a combination of factors," the report states. "When considering seasonality patterns alongside limited existing inventory and late-stage matches, RevPAR growth is expected to be strongest in markets such as Vancouver and Monterrey."

#### Operations

Hotel demand will be boosted in host markets beyond fans attending matches. FIFA will host fan festivals in each host market, and cities will put on additional World Cup-related events that will drive hotel demand.

Additionally, some host markets will have the added benefit of serving as team base camps, hosting teams as they train ahead of the tournament. Ten of the 16 host markets will also host training.

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