

# US hotels roar back with robust performance to kick off February

Super Bowl lifts Bay Area hotels; convention boosts Las Vegas market



Seattle Seahawks players celebrate after winning Super Bowl LX over the New England Patriots in Santa Clara, California on Feb. 8. (Getty Images)

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Revenue per available room growth returned for U.S. hotels in the week of Feb. 1-7, 2026. Countrywide, RevPAR rose by 2.8%, its strongest gain of the past five weeks.

The RevPAR increase was led by a 1.7% jump in average daily rate with occupancy rising to 56.4%. Weekday RevPAR was up 3.4%, driven by a 2.9% increase in ADR. Outside of New Year’s Eve, this was the largest weekday ADR increase since early November. Weekend RevPAR increased 1.4%, despite a 0.9% decline in ADR due to a 3% increase in room demand. The 3% demand increase – equivalent to 196,000 additional hotel rooms sold – was the largest weekend increase since June 2025.

### The story

Like in the previous week, there’s a lot more to this week’s U.S. hotel performance than meets the eye. First, Las Vegas alone was responsible for 140 basis points of the total U.S. RevPAR gain, Second, the net Super Bowl gain accounted for an

additional 70 basis points to RevPAR. Third, weekday RevPAR gains from Sunday to Thursday were driven by top 25 U.S. hotel markets excluding Las Vegas. And finally, the weekend was driven by markets outside of Las Vegas, the top 25, and the 2024 hurricane markets.

Las Vegas' big win was due to AHR Expo 2026, an annual HVAC convention that moves from city to city each year. This year's event brought in 53,300 attendees from Sunday through Thursday. Weekday Las Vegas hotel RevPAR soared upwards by 57.5% leading to a full week gain of 39.2%. The convention was so large that it had preferred rates at 46 of the 303 total hotels in the market, 40% of which were on the Las Vegas Strip. On any given night, Las Vegas has 164,200 available hotel rooms with this conference potentially occupying a third of them each day during its run.

## This week, San Francisco and Las Vegas led the growth in hotel RevPAR

U.S. RevPAR contribution by market category, week of Feb. 1-7, 2026



Source: CoStar, February 2026



Super Bowl LX, hosted in the California Bay Area, was another large contributor to this week's growth. The hotel impact of Super Bowl week spread across the greater Bay Area as Levi's Stadium is between San Francisco and San Jose in Santa Clara. The Bay Area hotel markets of San Francisco, San Jose and Oakland combined for a 128% increase in RevPAR and 27.3% lift in demand. San Francisco is the largest hotel market of these three and was host to most NFL media and related events, resulting in a 178% jump in RevPAR for the market.

This year's Super Bowl week (ending Saturday) saw higher occupancy than last year's – 77.2%, up 3 percentage points – but ADR was down 28.5% to \$352. Part of the reason for the latter is due to the nature of this year's Super Bowl, which was spread between San Francisco and San Jose. If you only look at San Francisco, occupancy was up 4.6 percentage points to 78.7% with a \$409 ADR, which is still 16.9% lower than New Orleans a year ago. We surmise that New Orleans' smaller number of hotels – particularly in the upper tier – and its tighter geographic distribution resulted in more compression.

The top 25 U.S. hotel markets, excluding Las Vegas and Tampa – a hurricane market – also saw solid performance with weekday RevPAR rising 3.6%. However, there's a wrinkle here due to the Super Bowl. San Francisco's RevPAR was up 92.3%

whereas New Orleans hotels saw the measure fall 59.4%. Taking both markets out, weekday RevPAR for the remaining markets (21) was still solid (+3.2%) led by Nashville (+22.6%), San Diego (+22.3%) and Minneapolis (+16.9%). Nashville's gain was powered by occupancy, partially driven by Winter Storm Fern's market displacement. San Diego was driven by various conferences, whereas Minneapolis continued to see added demand from federal officers, media and protesters.

New York was another standout market as weekday RevPAR rose 10.9% on equal gains in occupancy and ADR. Full week RevPAR was up 7%, marking the sixth consecutive week of growth. Year-to-date, NYC is up 9.5% in RevPAR, 6.5% in ADR and 2 percentage points in occupancy.

Washington, D.C. saw its sixth consecutive week of double-digit RevPAR decline, down 11% this week. Headwinds from the 2025 presidential inauguration and the lasting impact of winter weather have resulted in a 26.8% year-to-date RevPAR decline in D.C. Boston also saw weather impacts on hotel performance as RevPAR declined 10.6%. High winds and snowfall caused flight cancellations and dangerous road conditions, resulting in a 10.2-percentage-point decline in occupancy from Thursday to Saturday.

U.S. hotel RevPAR excluding Las Vegas was up 1.4%. Removing this year's and last year's Super Bowl markets, U.S. RevPAR advanced 0.7%. Finally, subtracting the 13 hurricane markets, "core" (157 of 174 markets) U.S. RevPAR was up 2%. Over the past four weeks, core RevPAR is up 0.3% and has been trending upwards since October.

### Segments and group

Luxury and upper-upscale hotels continue to drive the U.S. hotel industry. These hotels saw a 5.6% increase in RevPAR while midscale and economy hotels declined 0.3%. Demand was up in all hotel types but ADR growth remained elusive. Luxury and upper-upscale saw ADR increase by 4.6%. Thereafter, ADR was flat to down with midscale and economy hotels declining by 2.4%. In core markets, RevPAR was up in all class tiers, led by upper tier (+2.2%) with the remainder seeing gains of 1.3%.

Group demand in luxury and upper-upscale hotels increased 3.6% this week, the largest increase this year. San Francisco saw the largest increase, up 131% (+48,000 hotel rooms) due to the Super Bowl. New York had the next largest increase: up 70% or 29,000 more group rooms sold. San Diego and Los Angeles also saw increases of more than 10,000 additional group nights.

### Global hotel performance highlights

Global weekly hotel RevPAR advanced 6.9% on a same-store and constant USD basis. The increase came from occupancy, which grew 3.7 percentage points to 69.9%. Growth was widespread with only Australia, Japan and Mexico reporting weekly declines.

Among the large countries, Italy led with a RevPAR gain of 58.3% due to the start of the Winter Olympic games in Milan. Milan's RevPAR jumped 143% on a 120% increase in ADR (US\$483). Occupancy rose to 80.7%, up 10.3 percentage points. Seven Italian markets saw RevPAR advance by more than 10% with Lombardy up 55%. Five of 15 markets saw a retreat in RevPAR, with most seeing a decrease of 3%, except Florence, which fell 42% via a double-digit demand drop.

China's RevPAR increase 1.5% and contributed a full point to the total global gain, given its size. Beijing, Hong Kong, Shanghai, and Shenzhen all saw strong growth, due to easy comps to last year's Lunar New Year holidays.

The Gulf Cooperative Council (GCC) and India also saw strong RevPAR growth. Canada added to its growth streak as RevPAR rose 2.7% on a same-store basis. This is the sixth consecutive gain this year.

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