



Monthly Summary Report

May 2025

X Month
May 2025

Highlights

In May, return trips by land to the U.S. from Canada were down 38.2% YOY, while air arrivals fell 24.2%. As of April, July air bookings were down 1.5% for domestic and 13% for international travel. Tourism Economics forecasts U.S. inbound arrivals to decrease 9.4% YOY in 2025, down from 8.9% growth forecast previously.

U.S. hotel demand remains split: Luxury is up 5.5% YTD through May, while Economy is down 1.8%. ADR growth slowed to 1.6% nationally and 1.9% in Top 25 Markets. Except for Aug '24, Dec '24, and Jan '25, ADR growth has trailed inflation over the past year.



Hotel Demand
87.3K
+1.1% YOY

Source: STR



Hotel ADR
\$101.72
+0.3% YOY

Source: STR



ATL Checkpoint Volume
2.8M
-0.9% YOY

Source: TSA



Social Media Audience
47.7K
+5.8% YOY

Source: Sprout Social



Facebook Audience
31.6K
+2.7% YOY

Source: Meta



Website Sessions
30.3K
-20.6% YOY

Source: Google Analytics



Overnight Trip Share
74%

Source: Azira

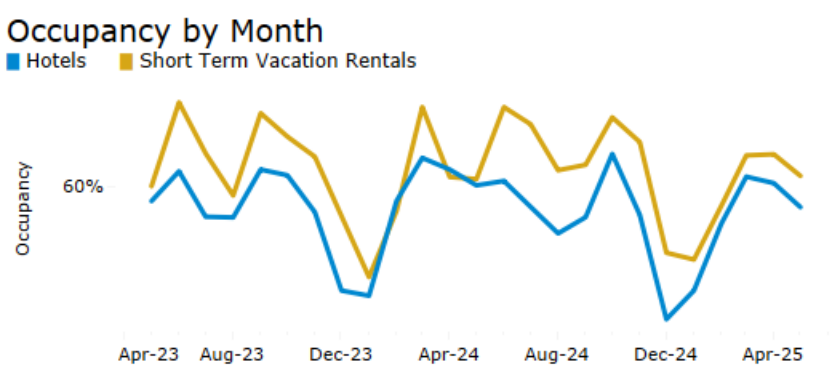


L&H Jobs
15.3K
+0.0% YOY

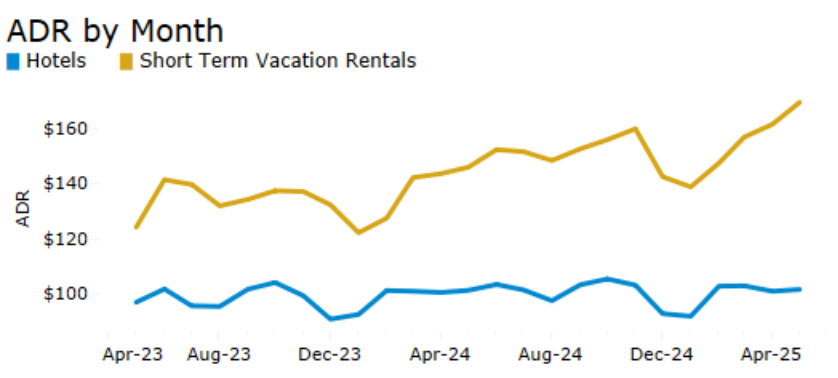
Source: Bureau of Labor Statistics



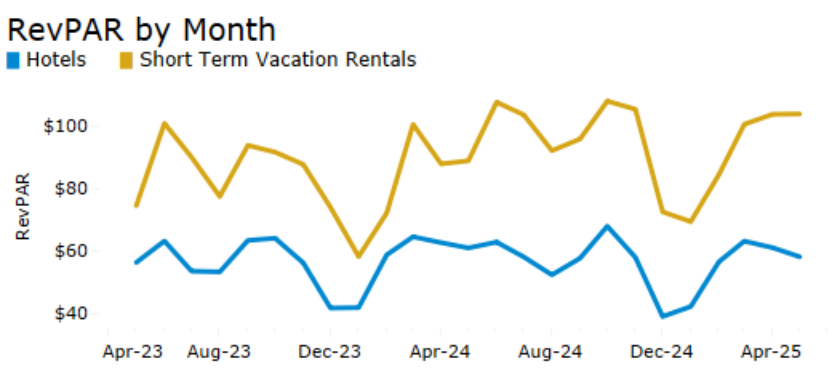
Aggregate Lodging Performance						
Sources: STR & AirDNA						
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
May 2025	57.6%	\$109.62	\$63.18	171.3K	98.7K	\$10.8M
YOY % Change	-4.3% YOY	+3.7% YOY	-0.8% YOY	+8.0% YOY	+3.3% YOY	+7.1% YOY
Year-to-Date	56.3%	\$106.68	\$60.09	831.1K	468.1K	\$49.9M
YTD YOY % Change	-2.9% YOY	+3.2% YOY	+0.1% YOY	+8.0% YOY	+4.8% YOY	+8.1% YOY



Hotel Performance						
Source: STR						
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
May 2025	57.2%	\$101.72	\$58.16	152.6K	87.3K	\$8.9M
YOY % Change	-5.0% YOY	+0.3% YOY	-4.7% YOY	+6.4% YOY	+1.1% YOY	+1.5% YOY
Year-to-Date	55.9%	\$100.46	\$56.18	743.9K	416.0K	\$41.8M
YTD YOY % Change	-3.3% YOY	+0.7% YOY	-2.7% YOY	+6.5% YOY	+2.9% YOY	+3.6% YOY



Short Term Vacation Rental Performance						
Source: AirDNA (All Properties)						
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
May 2025	61.4%	\$169.67	\$104.26	18.7K	11.5K	\$1.9M
YOY % Change	+0.7% YOY	+16.1% YOY	+16.9% YOY	+22.7% YOY	+23.5% YOY	+43.5% YOY
Year-to-Date	59.8%	\$156.36	\$93.43	87.2K	52.1K	\$8.1M
YTD YOY % Change	+0.0% YOY	+13.4% YOY	+13.4% YOY	+22.4% YOY	+22.4% YOY	+38.8% YOY

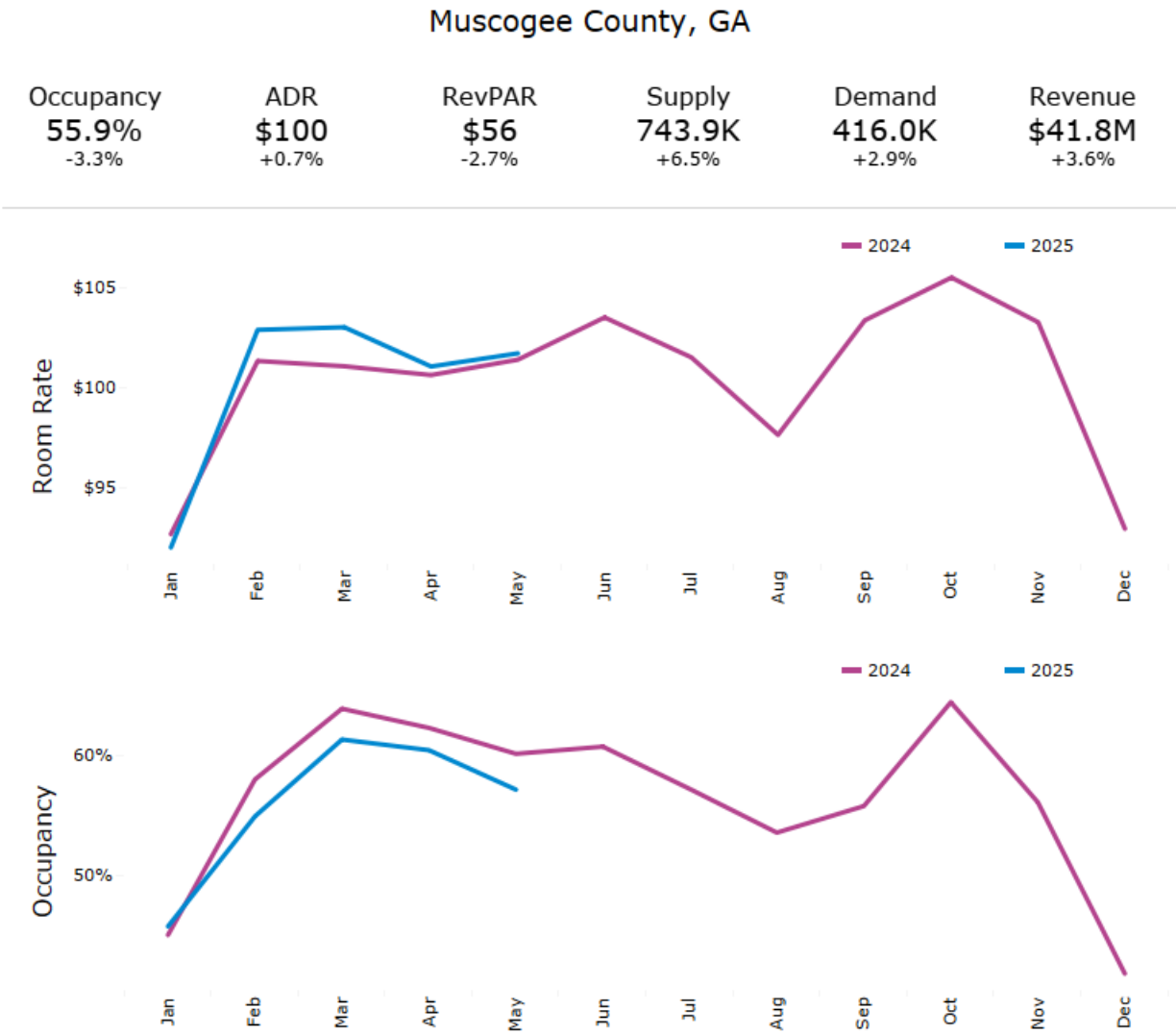


III

Monthly Performance by Market

		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Mar	Muscogee County, GA	61.3%	-4.0%	\$103	+1.9%	\$63	-2.2%
	Russell County, AL	54.3%	+10.8%	\$104	-3.4%	\$56	+7.0%
Apr	Muscogee County, GA	60.5%	-3.0%	\$101	+0.4%	\$61	-2.6%
	Russell County, AL	53.4%	+8.9%	\$103	-1.1%	\$55	+7.7%
May	Muscogee County, GA	57.2%	-5.0%	\$102	+0.3%	\$58	-4.7%
	Russell County, AL	48.9%	+11.9%	\$100	-7.8%	\$49	+3.1%

Calendar Year-to-Date Performance



Hotel Competitive Performance

III

Monthly Performance by Market

		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Mar	Muscogee County, GA	61.3%	-4.0%	\$103	+1.9%	\$63	-2.2%
	Albany/Southwest, GA	59.6%	+1.1%	\$98	+5.3%	\$59	+6.5%
	Athens/Gainesville, GA	62.6%	-4.3%	\$140	+1.0%	\$87	-3.4%
	Auburn-Opelika, AL	63.3%	+7.0%	\$130	+9.3%	\$82	+16.9%
	Augusta, GA	69.0%	+13.2%	\$107	+14.4%	\$74	+29.5%
	Brunswick/Kingsland, ..	61.5%	-5.3%	\$159	-3.8%	\$98	-8.9%
	Cobb County, GA	66.7%	-0.7%	\$108	+5.9%	\$72	+5.2%
	DeKalb County, GA	62.7%	-3.8%	\$105	-0.9%	\$66	-4.7%
	Gwinnett County, GA	65.5%	-2.8%	\$93	+1.7%	\$61	-1.2%
	LaGrange, GA	67.9%	-5.5%	\$167	-3.4%	\$113	-8.7%
	LaGrange, GA+	67.9%	-5.5%	\$167	-3.4%	\$113	-8.7%
	Lowndes County, GA	75.1%	+17.9%	\$111	+13.2%	\$84	+33.4%
	Macon, GA	59.1%	+4.7%	\$95	+1.8%	\$56	+6.6%
	Montgomery, AL	72.6%	+5.6%	\$120	+2.8%	\$87	+8.5%
	Russell County, AL	54.3%	+10.8%	\$104	-3.4%	\$56	+7.0%
	Savannah, GA	75.9%	-3.3%	\$165	-3.0%	\$125	-6.1%
Apr	Muscogee County, GA	60.5%	-3.0%	\$101	+0.4%	\$61	-2.6%
	Albany/Southwest, GA	59.0%	+3.4%	\$98	+5.3%	\$58	+8.9%
	Athens/Gainesville, GA	63.0%	-2.2%	\$138	+4.3%	\$87	+2.0%
	Auburn-Opelika, AL	64.7%	+2.4%	\$137	+5.6%	\$88	+8.2%
	Augusta, GA	68.2%	+1.7%	\$258	+8.9%	\$176	+10.8%
	Brunswick/Kingsland, ..	64.7%	+5.6%	\$178	+2.4%	\$115	+8.1%
	Cobb County, GA	64.0%	-2.6%	\$113	-3.2%	\$72	-5.7%
	DeKalb County, GA	62.1%	-3.7%	\$103	-2.8%	\$64	-6.4%
	Gwinnett County, GA	66.7%	-2.9%	\$98	+4.0%	\$66	+1.1%
	LaGrange, GA	67.8%	-0.9%	\$155	+4.2%	\$105	+3.2%
	LaGrange, GA+	67.8%	-0.9%	\$155	+4.2%	\$105	+3.2%
	Lowndes County, GA	68.8%	+18.8%	\$107	+12.8%	\$73	+34.1%
	Macon, GA	55.0%	+1.5%	\$96	+1.0%	\$53	+2.6%
	Montgomery, AL	68.1%	+0.1%	\$116	+1.6%	\$79	+1.7%
	Russell County, AL	53.4%	+8.9%	\$103	-1.1%	\$55	+7.7%
	Savannah, GA	75.9%	-4.6%	\$168	-1.2%	\$128	-5.7%
May	Muscogee County, GA	57.2%	-5.0%	\$102	+0.3%	\$58	-4.7%
	Albany/Southwest, GA	55.2%	-1.8%	\$99	+3.8%	\$55	+1.9%
	Athens/Gainesville, GA	60.9%	-4.0%	\$156	+7.3%	\$95	+3.0%
	Auburn-Opelika, AL	61.0%	+0.2%	\$153	+3.9%	\$94	+4.1%
	Augusta, GA	60.1%	+2.8%	\$99	+5.5%	\$59	+8.5%
	Brunswick/Kingsland, ..	58.8%	-0.6%	\$178	-1.2%	\$105	-1.7%
	Cobb County, GA	65.8%	-1.1%	\$123	+6.6%	\$81	+5.4%
	DeKalb County, GA	60.8%	-2.5%	\$102	-2.4%	\$62	-4.9%
	Gwinnett County, GA	66.4%	-4.7%	\$96	+1.2%	\$64	-3.5%
	LaGrange, GA	60.9%	-10.9%	\$134	-0.9%	\$82	-11.7%
	LaGrange, GA+	60.9%	-10.9%	\$134	-0.9%	\$82	-11.7%
	Lowndes County, GA	69.3%	+18.4%	\$105	+8.7%	\$73	+28.8%
	Macon, GA	51.1%	+1.6%	\$92	+1.6%	\$47	+3.2%
	Montgomery, AL	65.9%	+0.4%	\$113	+1.1%	\$75	+1.5%
	Russell County, AL	48.9%	+11.9%	\$100	-7.8%	\$49	+3.1%
	Savannah, GA	70.5%	-4.9%	\$155	-2.3%	\$109	-7.1%

Calendar Year-to-Date Performance

Performance by Market

Occupancy		ADR		RevPAR	
Lowndes County, GA	70.6%	Brunswick/Kingsland, GA	\$160	Savannah, GA	\$109
Savannah, GA		Savannah, GA		Brunswick/Kingsland, GA	
Montgomery, AL	65.6%	LaGrange, GA+	\$146	LaGrange, GA+	\$92
Gwinnett County, GA	64.7%	LaGrange, GA	\$146	LaGrange, GA	\$92
Augusta, GA	64.4%	Augusta, GA	\$143	Augusta, GA	\$92
Cobb County, GA	63.6%	Athens/Gainesville, GA	\$141	Athens/Gainesville, GA	\$83
LaGrange, GA	63.2%	Auburn-Opelika, AL	\$134	Auburn-Opelika, AL	\$79
LaGrange, GA+	63.1%	Montgomery, AL	\$113	Lowndes County, GA	\$75
DeKalb County, GA	60.3%	Cobb County, GA	\$112	Montgomery, AL	\$74
Athens/Gainesville, GA	59.3%	Lowndes County, GA	\$107	Cobb County, GA	\$71
Auburn-Opelika, AL	58.9%	DeKalb County, GA	\$104	DeKalb County, GA	\$63
Brunswick/Kingsland, GA	57.9%	Russell County, AL	\$100	Gwinnett County, GA	\$61
Albany/Southwest, GA	56.3%	Muscogee County, GA	\$100	Muscogee County, GA	\$56
Muscogee County, GA	55.9%	Albany/Southwest, GA	\$97	Albany/Southwest, GA	\$54
Macon, GA	53.1%	Gwinnett County, GA	\$94	Macon, GA	\$49
Russell County, AL	48.7%	Macon, GA	\$92	Russell County, AL	\$49

% Change vs. Previous Year

Occupancy % Change		ADR % Change		RevPAR % Change	
Lowndes County, GA	+21.5%	Lowndes County, GA		Lowndes County, GA	+37.1%
Russell County, AL		Augusta, GA	+8.2%	Augusta, GA	
Augusta, GA	+9.6%	Auburn-Opelika, AL	+4.7%	Auburn-Opelika, AL	+7.9%
Macon, GA	+3.2%	Albany/Southwest, GA	+4.5%	Russell County, AL	+7.6%
Auburn-Opelika, AL	+3.0%	Athens/Gainesville, GA	+4.5%	Albany/Southwest, GA	+6.0%
Montgomery, AL	+2.1%	Cobb County, GA	+3.1%	Macon, GA	+4.5%
Albany/Southwest, GA	+1.5%	Gwinnett County, GA	+2.6%	Montgomery, AL	+3.4%
Brunswick/Kingsland, GA	+0.6%	Montgomery, AL	+1.3%	Cobb County, GA	+2.4%
Cobb County, GA	-0.7%	Macon, GA	+1.3%	Gwinnett County, GA	+0.8%
Gwinnett County, GA	-1.7%	Muscogee County, GA	+0.7%	Athens/Gainesville, GA	+0.7%
DeKalb County, GA	-2.3%	LaGrange, GA+	-0.7%	Brunswick/Kingsland, GA	-1.0%
Muscogee County, GA	-3.3%	Savannah, GA	-0.8%	Muscogee County, GA	-2.7%
Athens/Gainesville, GA	-3.6%	DeKalb County, GA	-1.0%	DeKalb County, GA	-3.3%
LaGrange, GA+	-5.1%	LaGrange, GA	-1.3%	LaGrange, GA+	-5.8%
LaGrange, GA	-5.2%	Brunswick/Kingsland, GA	-1.6%	Savannah, GA	-6.0%
Savannah, GA	-5.3%	Russell County, AL	-3.9%	LaGrange, GA	-6.5%

III

Monthly Performance by Market

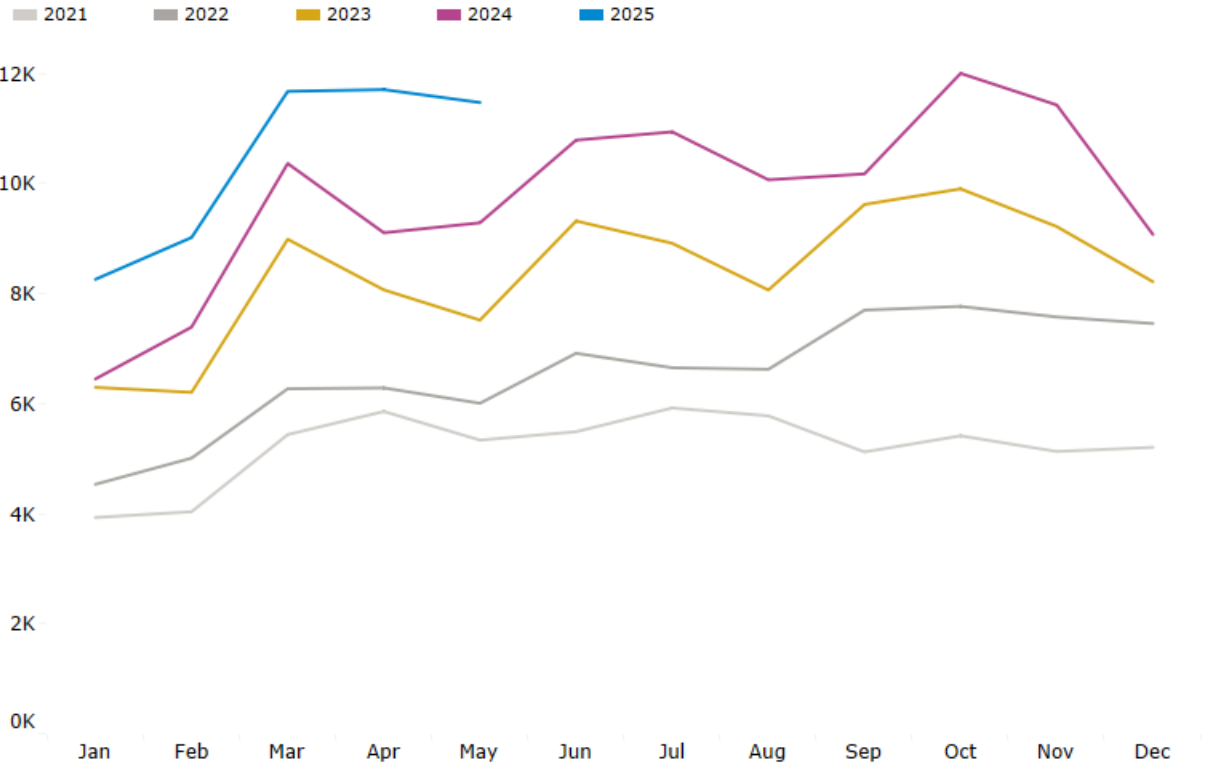
		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Mar	Columbus	64.3%	-9.3%	\$157	+10.3%	\$101	+0.0%
Apr	Columbus	64.4%	+5.1%	\$162	+12.5%	\$104	+18.2%
May	Columbus	61.4%	+0.7%	\$170	+16.1%	\$104	+16.9%

Calendar Year-to-Date Performance

Columbus All Properties					
Occupancy	ADR	RevPAR	Supply	Demand	Revenue
59.8%	\$156	\$93	87.2K	52.1K	\$8.1M
+0.0%	+13.4%	+13.4%	+22.4%	+22.4%	+38.8%

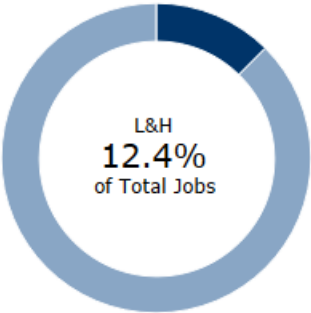
Short Term Rental Demand by Month

Last Five Calendar Years



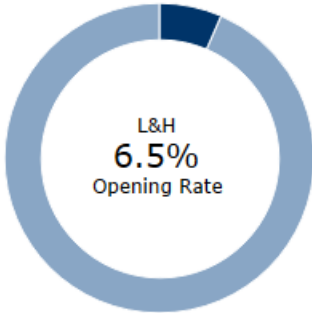
Total Leisure & Hospitality Jobs

L&H Jobs
as of May 2025
15.3K
+0.0% YOY | +0.7% vs. 2019



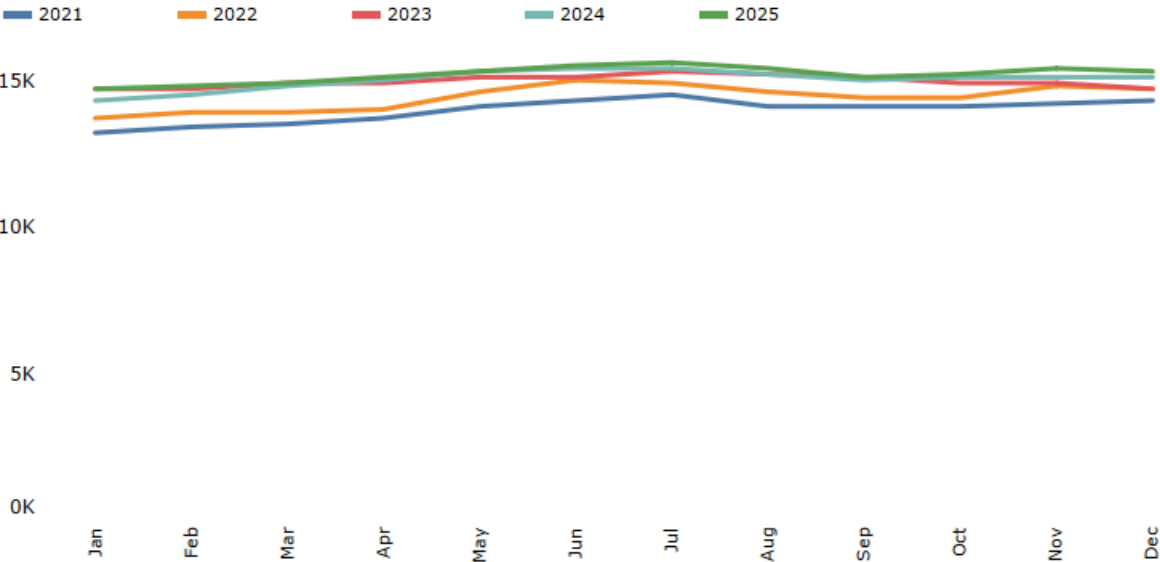
Leisure & Hospitality Job Openings

L&H Job Openings
as of May 2025
1.1K
+38.0% YOY | +35.1% vs. 2019



Employment Recovery

Leisure & Hospitality Jobs (Thousands)

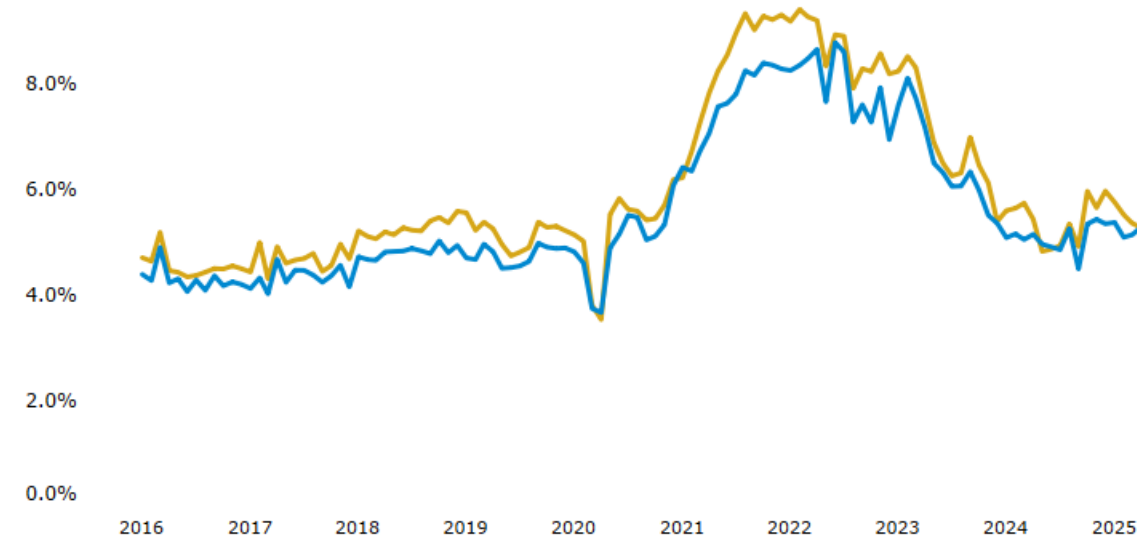


Source: Bureau of Labor Statistics

Job Opening Rate

Share of total available jobs that are not filled

Leisure and Hospitality Total Nonfarm



Source: Tourism Economics

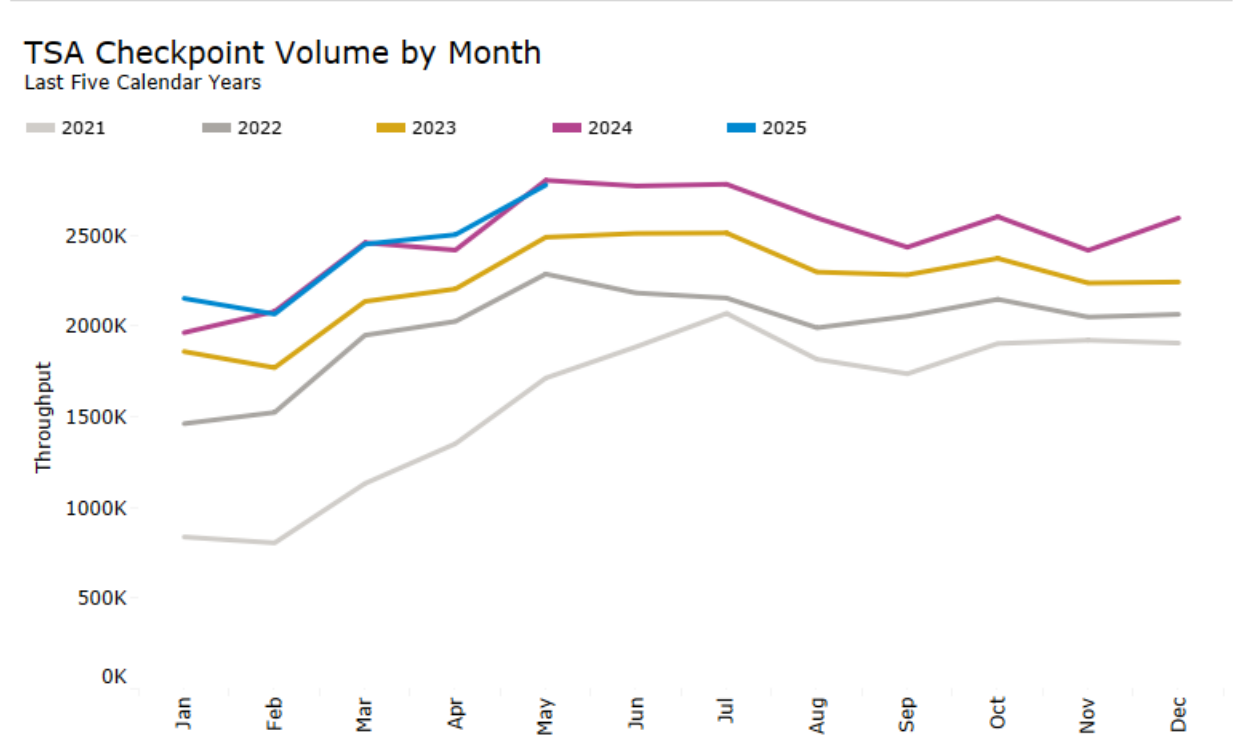
Airport TSA Checkpoint Volume & Visitor Origins

ATL - Hartsfield - Jackson Atlanta International



Monthly TSA Checkpoint Volume

May 2025 Volume
2.8M
-0.9% YOY

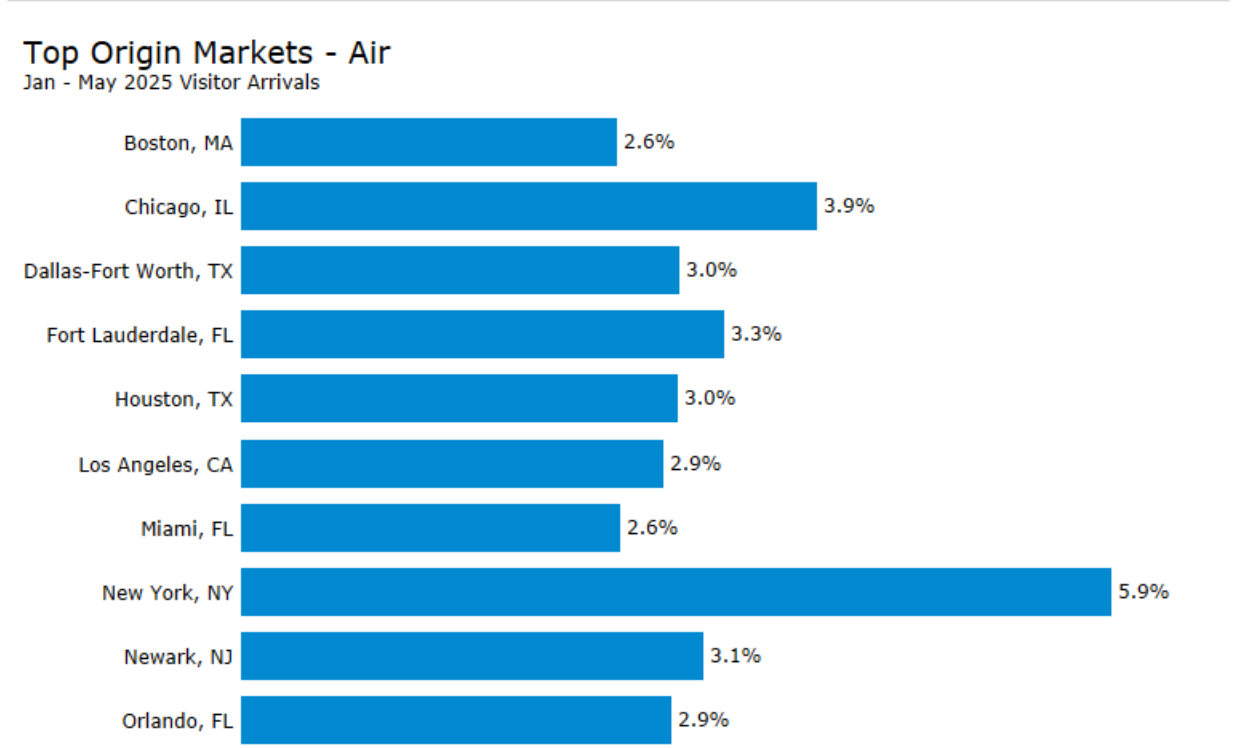


Source: Transportation Security Administration

Year-to-Date TSA Checkpoint Volume & Visitor Origins

Jan - May 2025 Volume
12.0M
+1.9% YOY

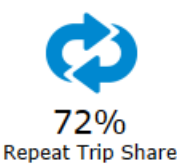
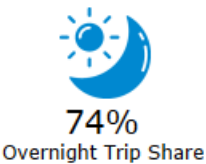
Source: Transportation Security Administration



Source: OAG

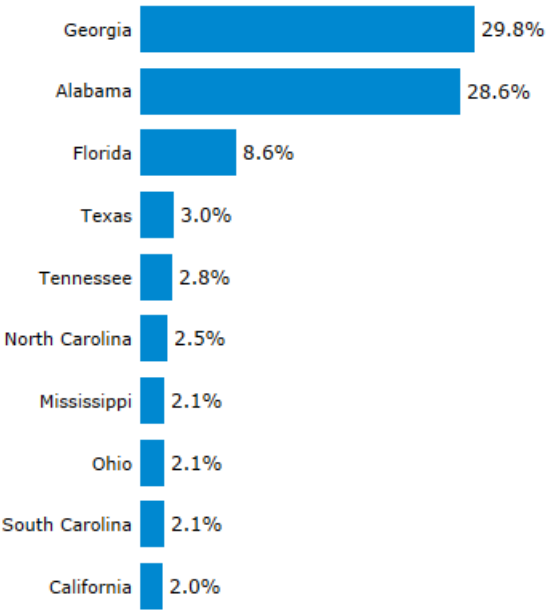


May 2025 Domestic Visits

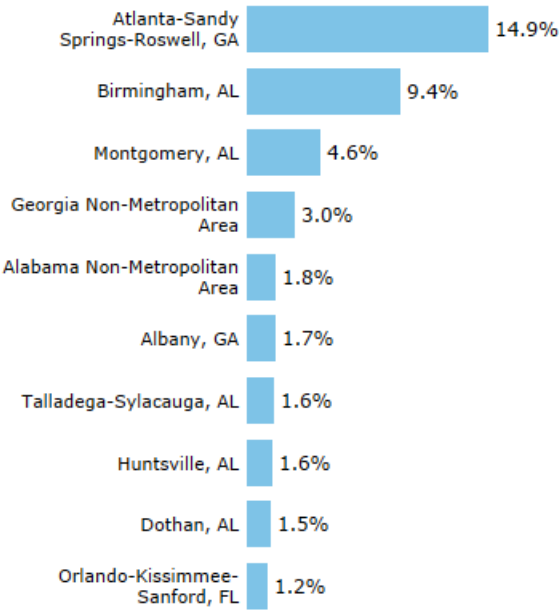


Top Origin Markets

States

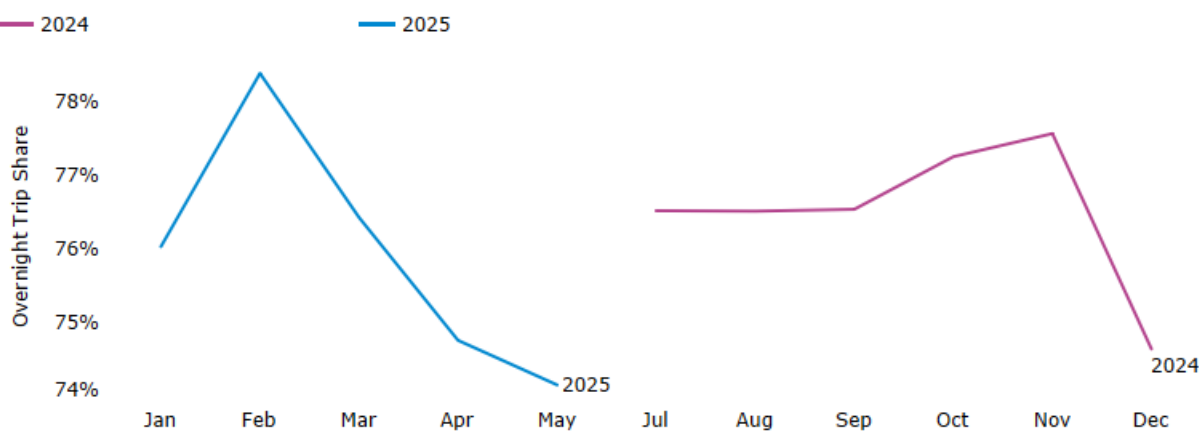


MSA

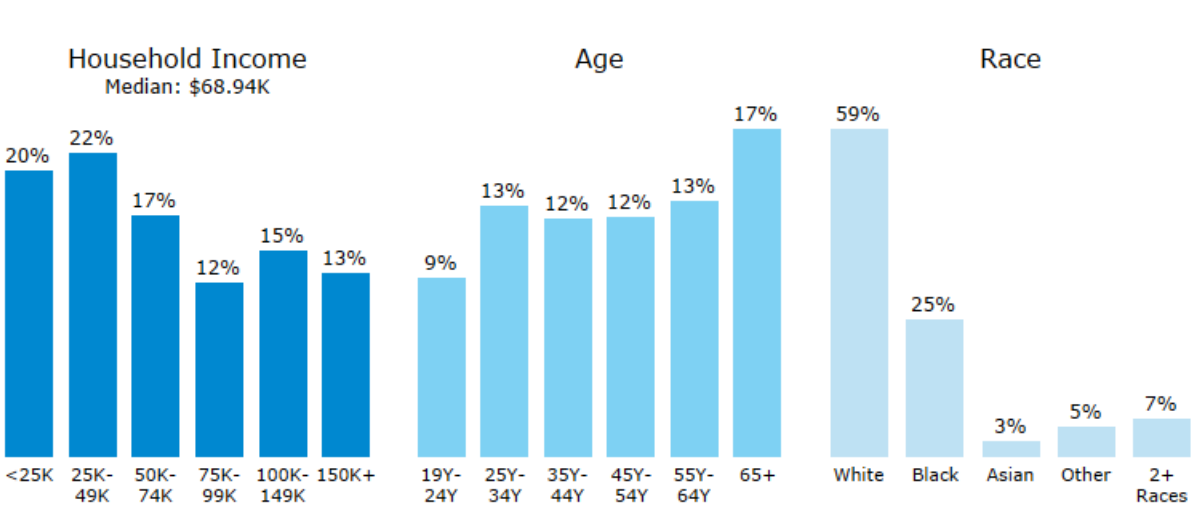


Domestic Visitor Trends & Characteristics

Overnight Trip Share by Month

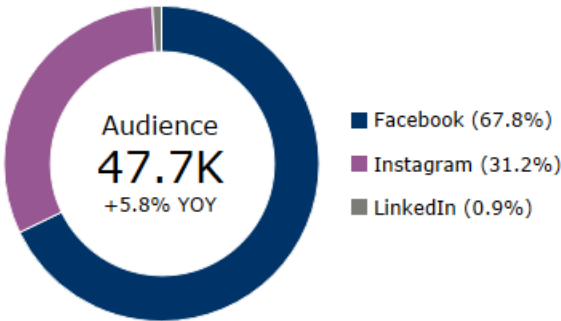


May 2025 Visitor Origin Demographics

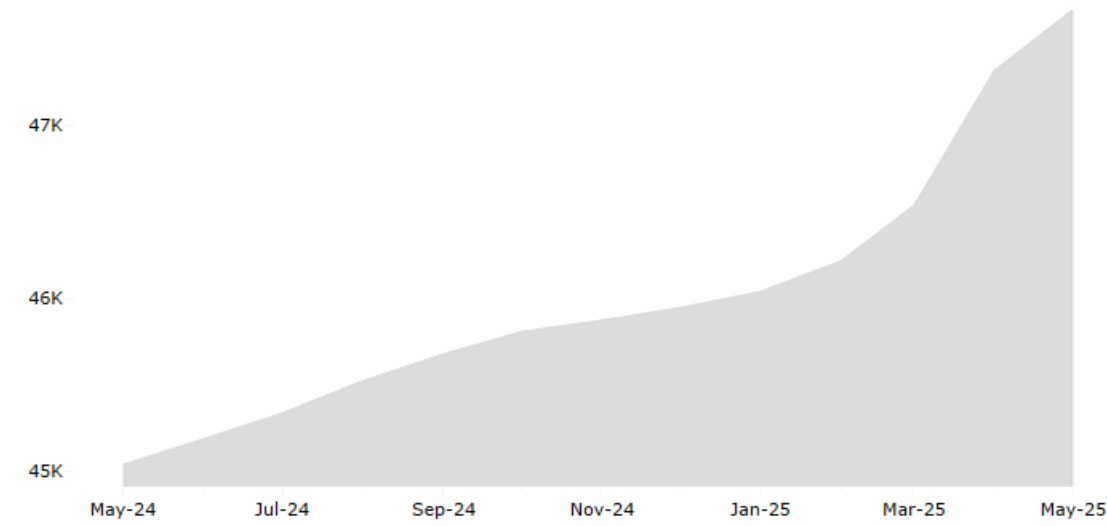




Audience Overview



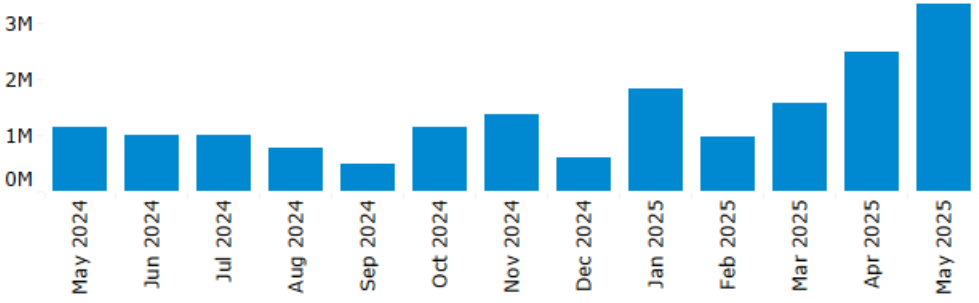
Audience by Month



Engagements & Impressions

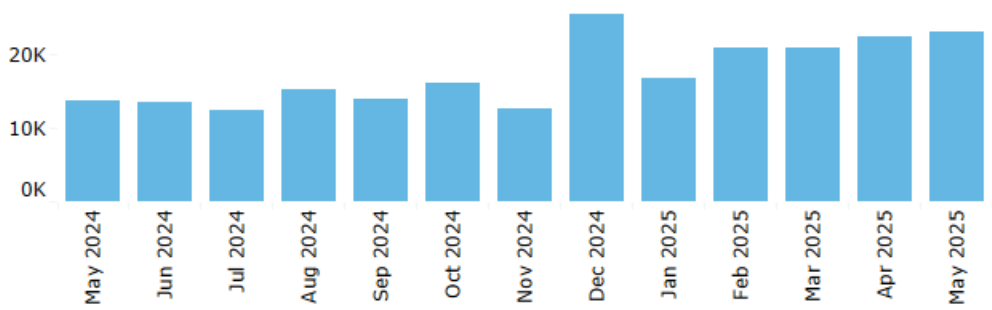
Impressions

May 2025
3.3M
+195.3% YOY



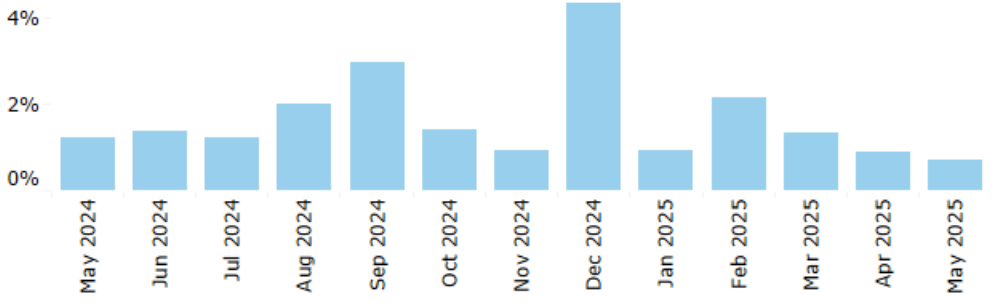
Engagements

May 2025
23.1K
+68.5% YOY



Engagement Rate

May 2025
0.7%
-0.5% pt YOY



Website Performance Summary

May 2025 | Properties: All



Users
26.3K
-21.5% YOY



Sessions
30.3K
-20.6% YOY



Engaged Sessions
16.3K
-5.2% YOY



Engagement Rate
53.8%
+8.73% pt YOY



Page Views
55.1K
-5.6% YOY



Pages Per Session
1.82 pages
+0.29 pages YOY

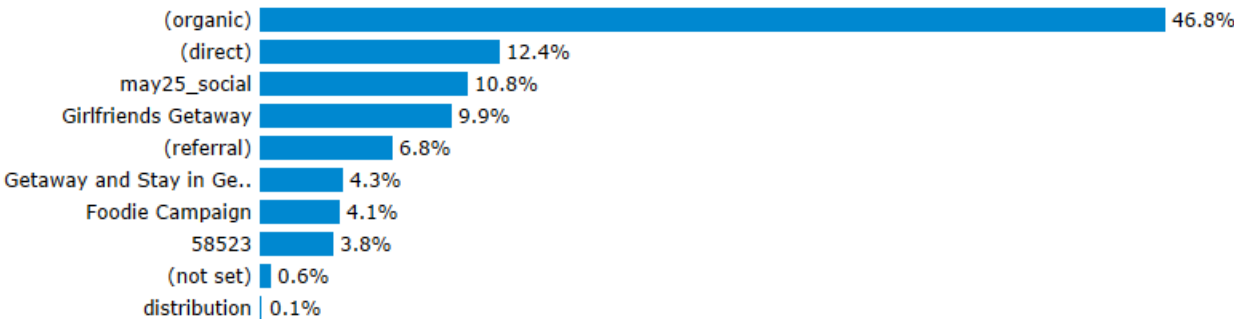


Avg. Session Duration
00:01:58
+28 sec YOY

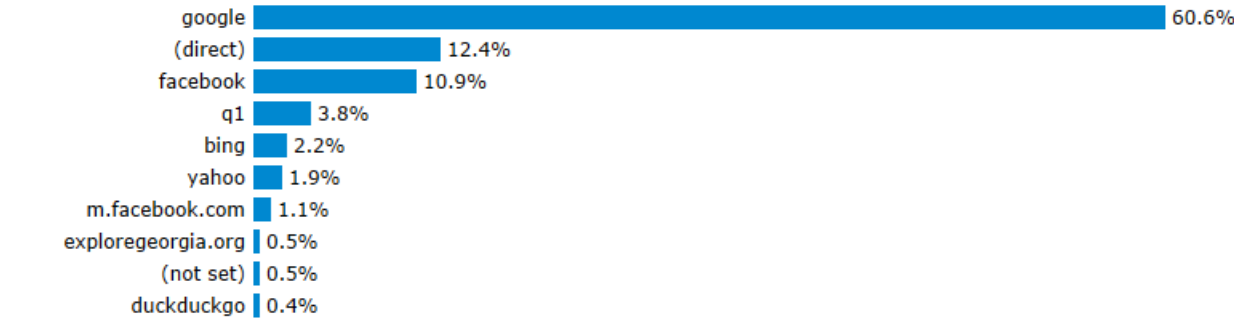


Bounce Rate
46.2%
-8.73% pt YOY

Campaigns

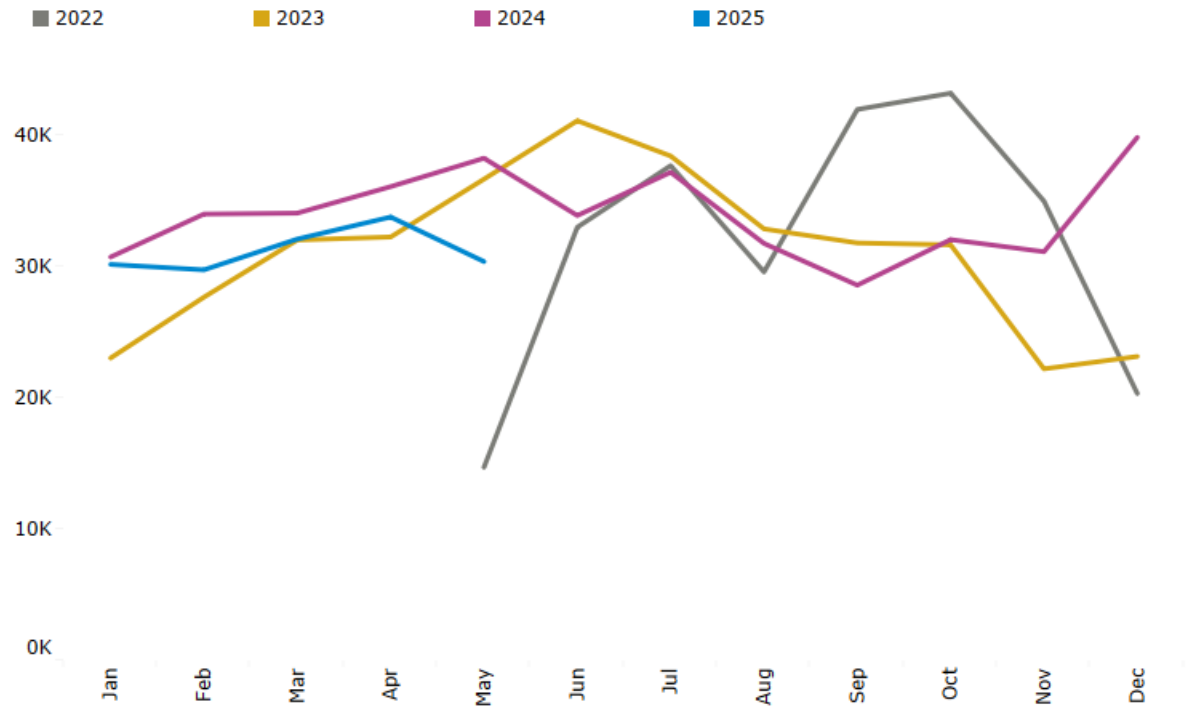


Sources



Sessions Analysis

Monthly Trend



Source: Google Analytics
Note: Due to Google's practice of exporting sampled data to protect user identities, figures may not precisely match data viewed in the Google Analytics platform.

Social Media Performance by Platform

May 2025



Facebook



Audience
32.3K
+2.9% YOY

Engagement Rate	0.6%
Impressions	3,228,002
Video Views	27,245
Engagements	19,375
Comments	141
Reactions	1,613
Shares	147
Post Link Clicks	10,495
Other Post Clicks	6,979

Instagram



Audience
14.9K
+9.3% YOY

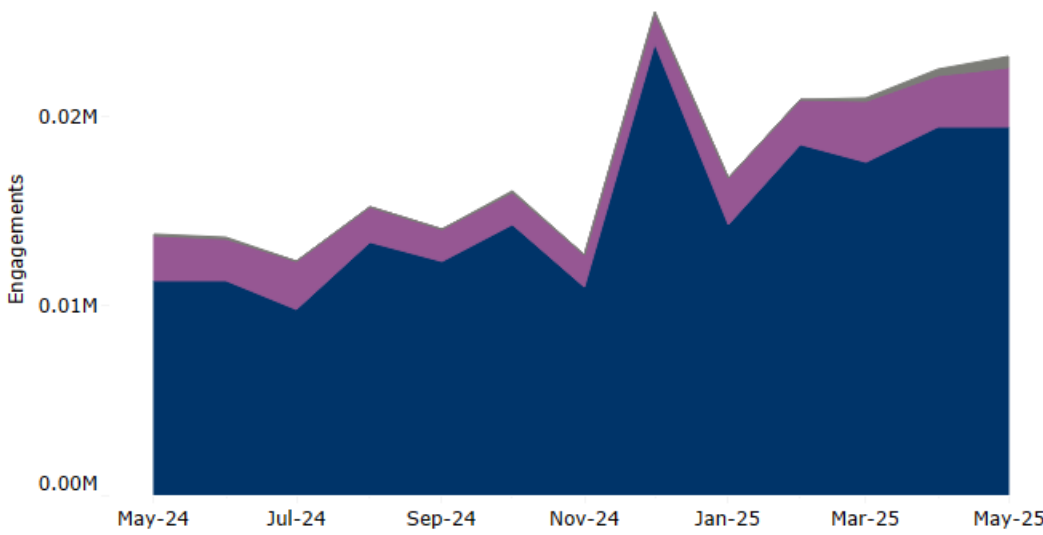
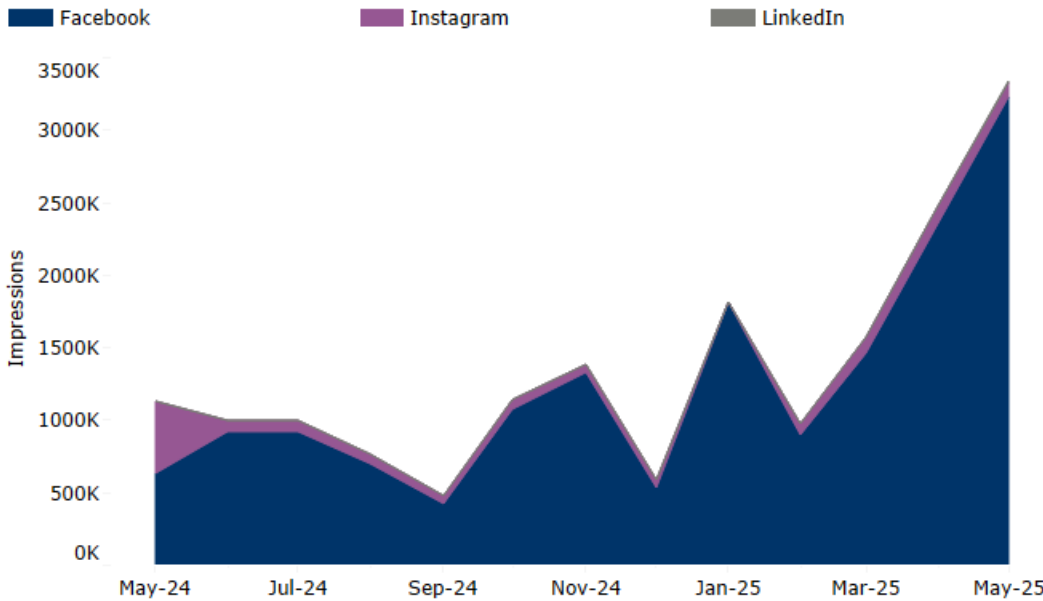
Engagement Rate	3.1%
Impressions	101,269
Video Views	5,418
Engagements	3,118
Comments	109
Reactions	2,517
Saves	
Shares	395

LinkedIn



Audience
445

Engagement Rate	12.1%
Impressions	5,355
Video Views	
Engagements	646
Comments	37
Reactions	295
Shares	5
Post Link Clicks	309

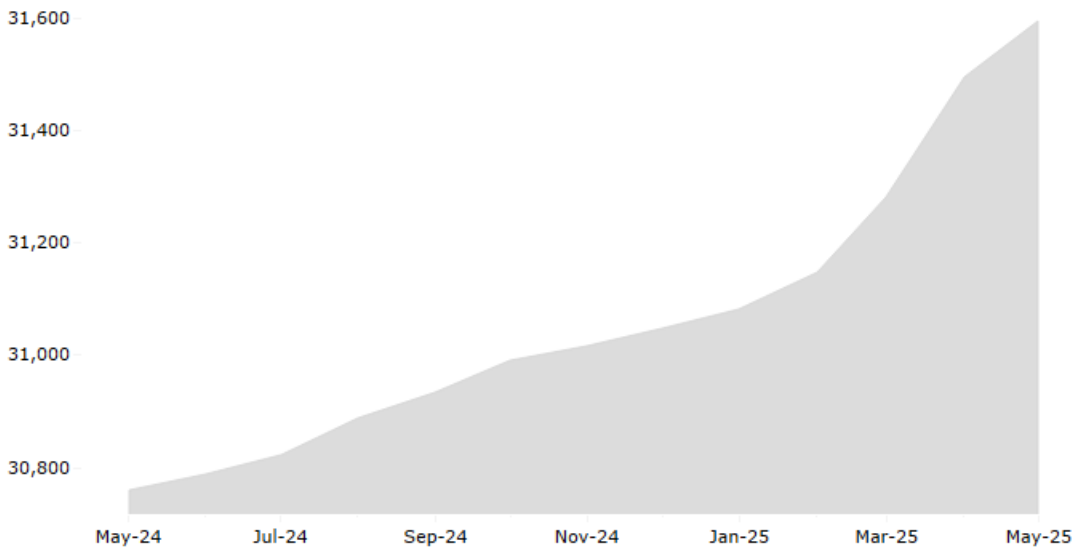




Audience Overview

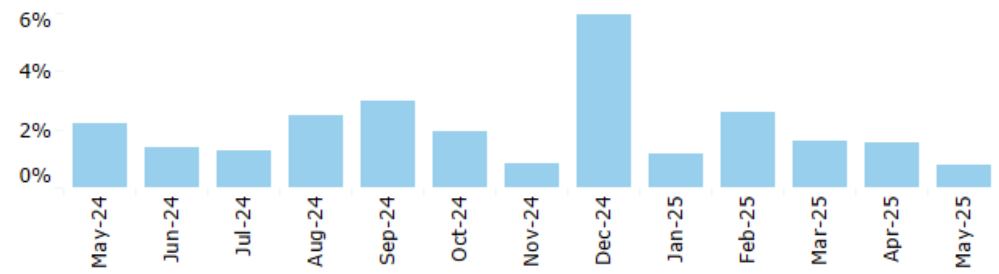
Audience
May 2025
31.6K
+2.7% YOY

Audience by Month

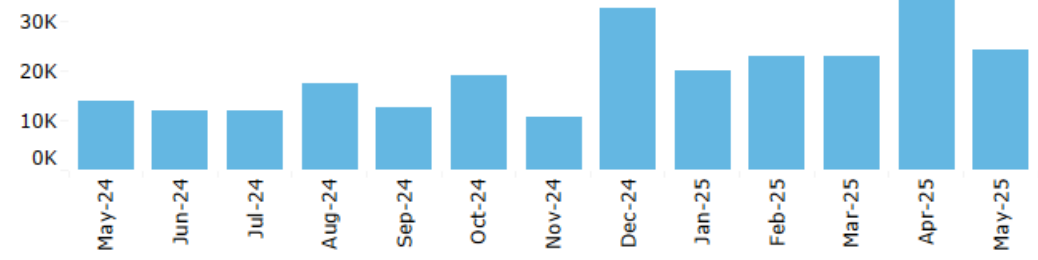


Engagements & Impressions

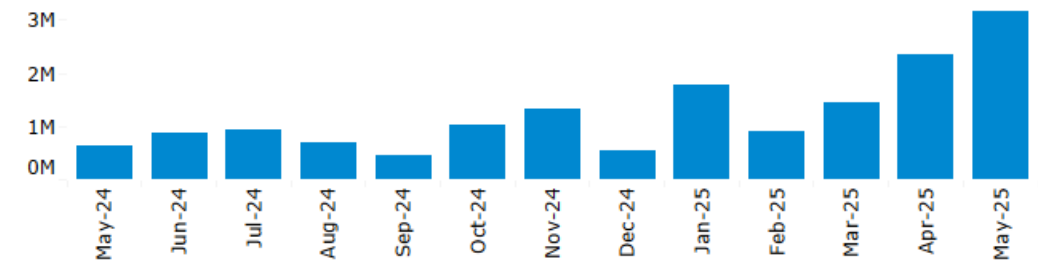
Engagement
Rate
May 2025
0.8%
-1.4% pt YOY



Engagements
May 2025
24.2K
+76.7% YOY

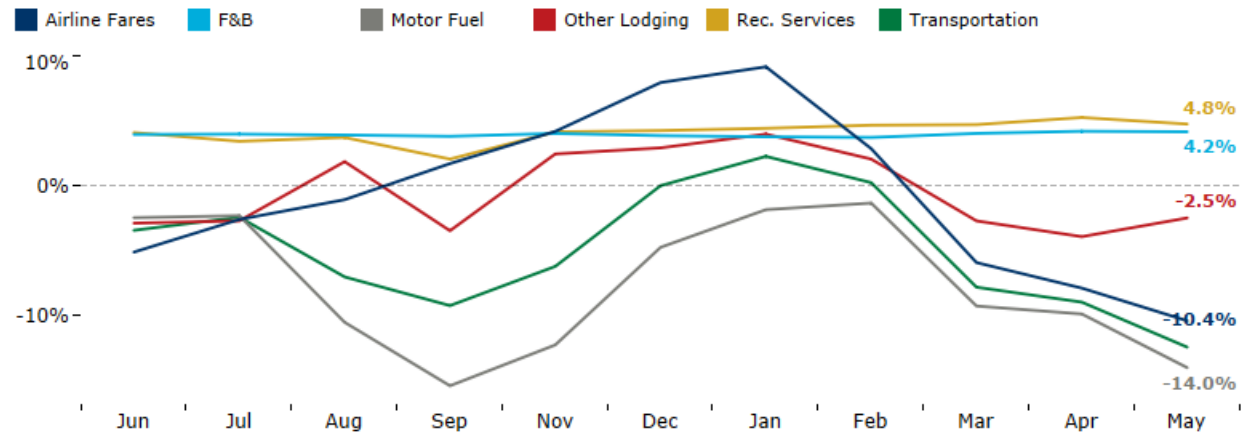


Total
Impressions
May 2025
3.2M
+398.8% YOY



Travel Price Index

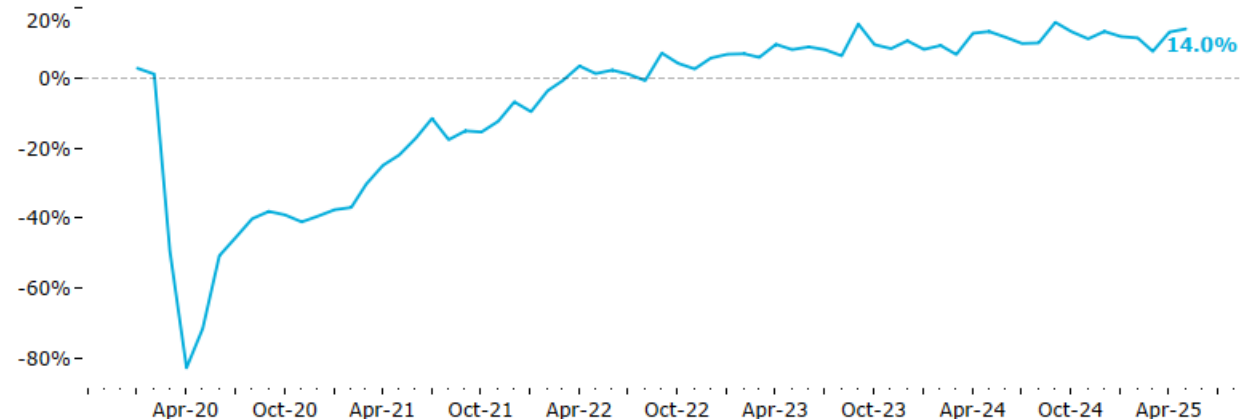
% Change Relative to Same Month in Previous Year | Last 12 Months



Source: U.S. Travel Association via U.S. Travel Recovery Tracker

Travel Spending (% change vs 2019)

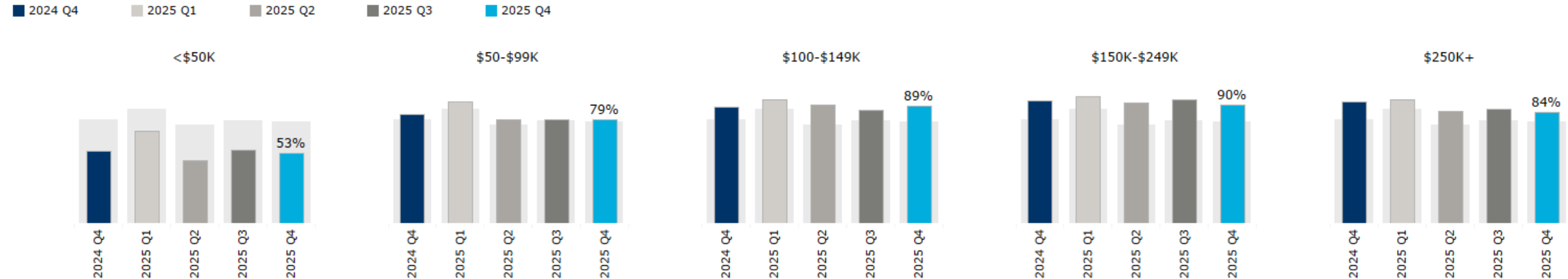
% Change vs. 2019 | U.S. total



Source: Tourism Economics via U.S. Travel Recovery Tracker

Planning Leisure Travel Within the Next 12 Months

% of American Consumers Planning Travel by Household Income (Calendar Year)

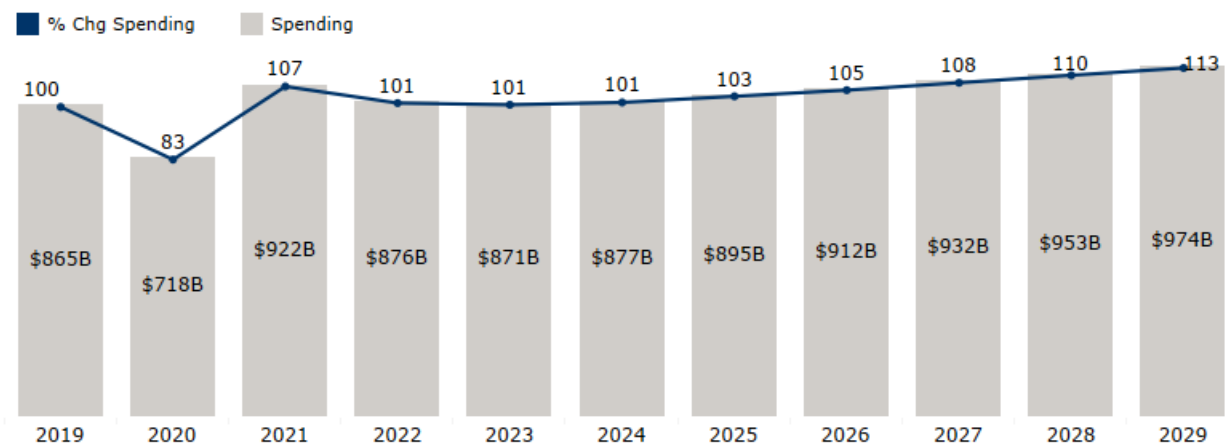


Note: Light gray bars represent the average for all survey respondents
Source: MMGY Global's Portrait of American Travelers

Domestic Travel Forecast

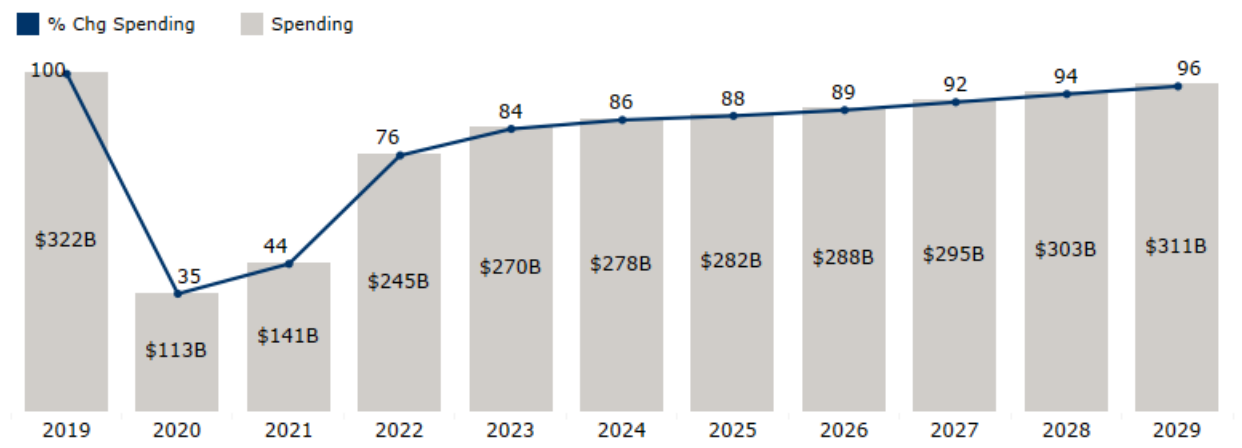
Real Domestic Leisure Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



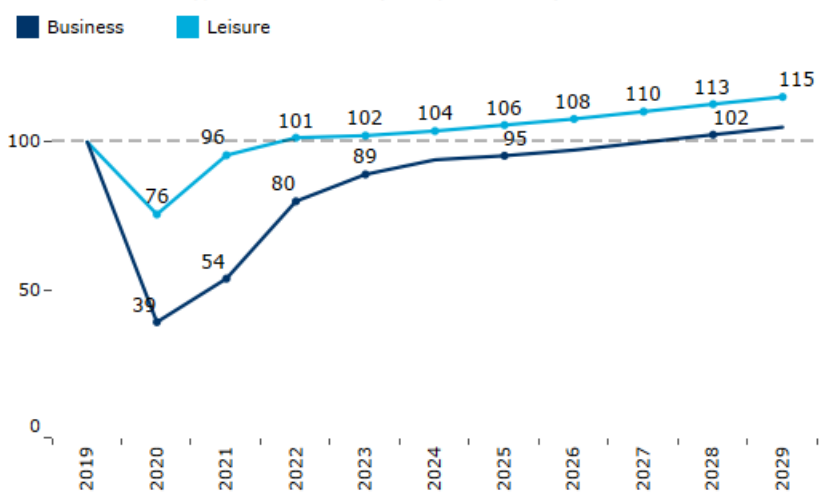
Real Domestic Business Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



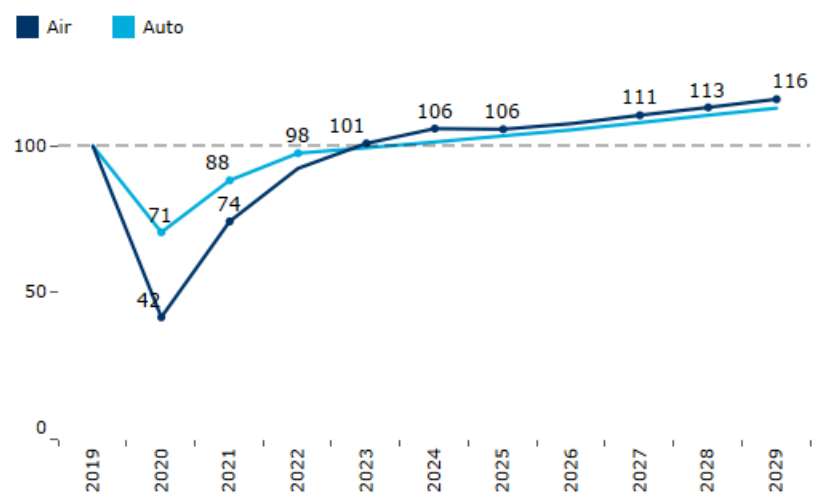
Leisure vs. Business Travel Volume

Forecasted recovery, relative to 2019 (index, 2019=100)



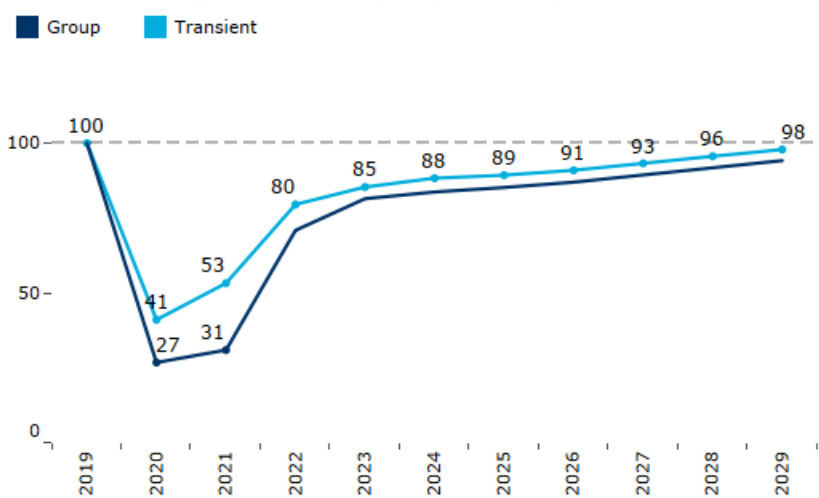
Auto vs. Air Travel Volume

Forecasted recovery, relative to 2019 (index, 2019=100)



Group vs. Transient Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



Forecast as of October 2025

Source: Tourism Economics via U.S. Travel Recovery Tracker

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