



Monthly Summary Report

May 2025

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

Lodging Summary

Muscogee County, GA | May 2025 and Calendar Year-to-Date Performance



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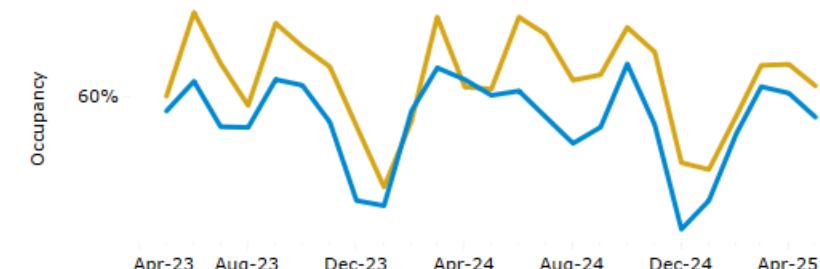
Aggregate Lodging Performance

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

Occupancy by Month

Hotels Short Term Vacation Rentals



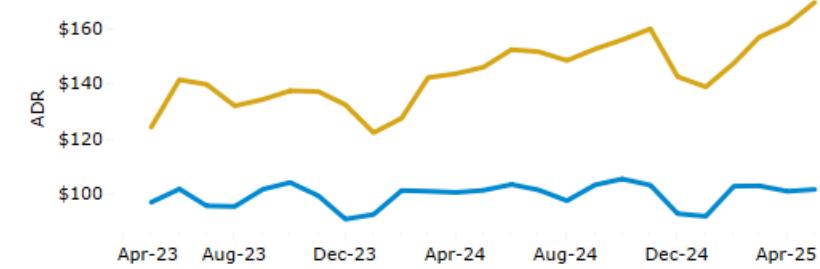
Hotel Performance

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

ADR by Month

Hotels Short Term Vacation Rentals



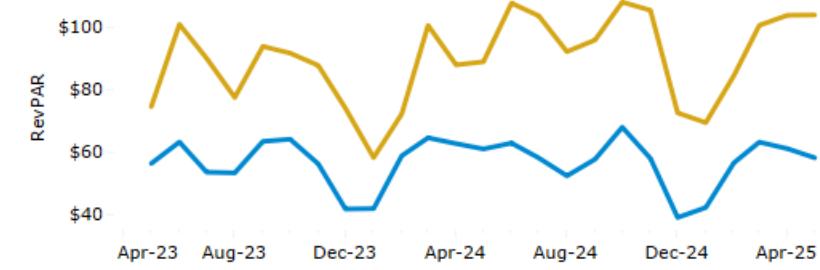
Short Term Vacation Rental Performance

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

RevPAR by Month

Hotels Short Term Vacation Rentals

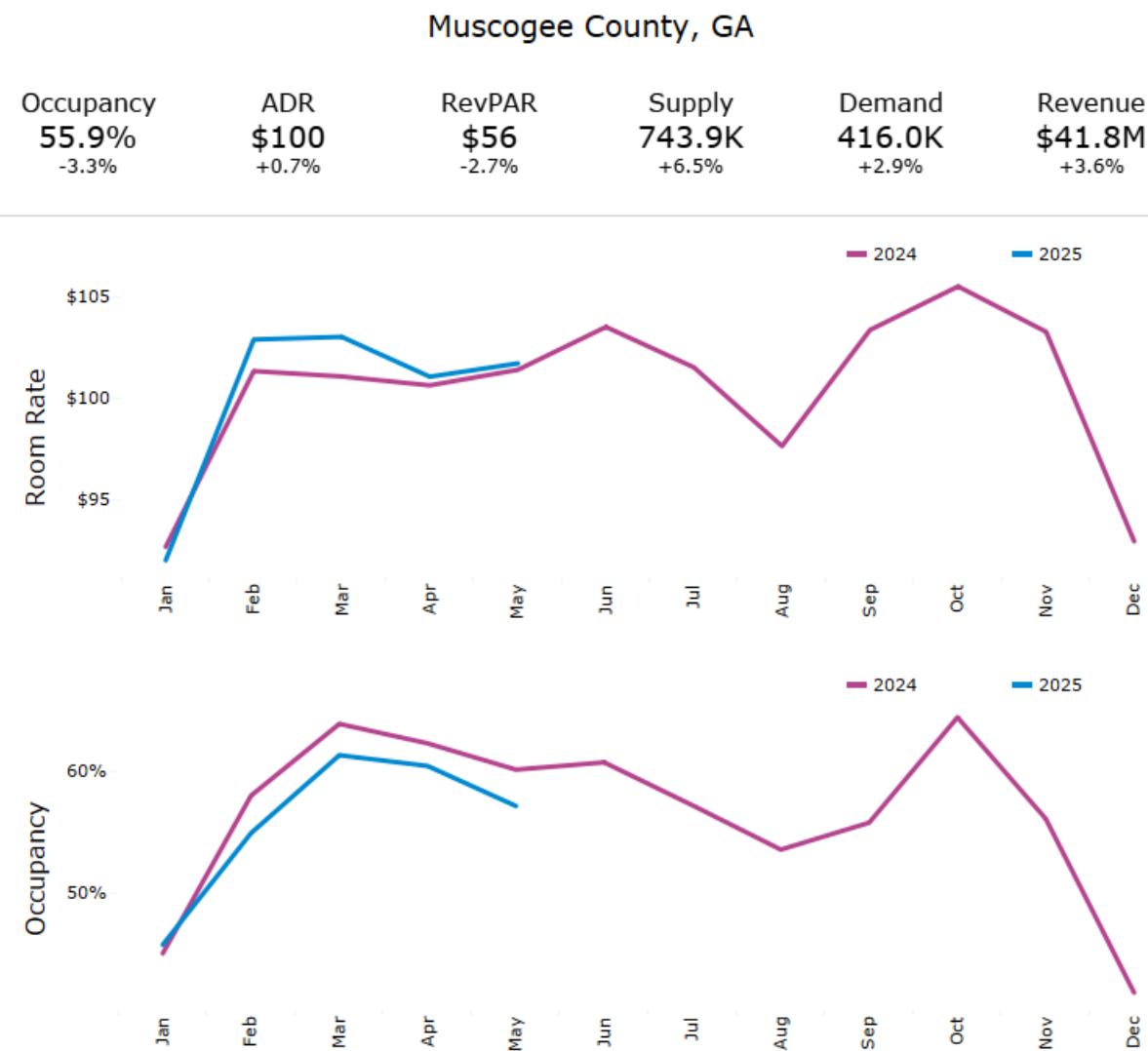




Monthly Performance by Market

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

Calendar Year-to-Date Performance



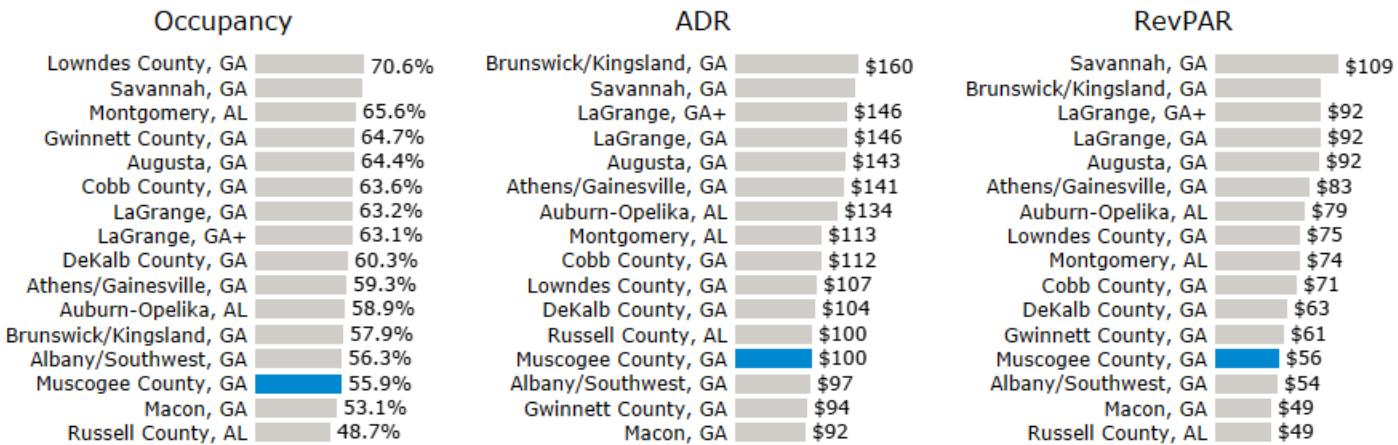


Monthly Performance by Market

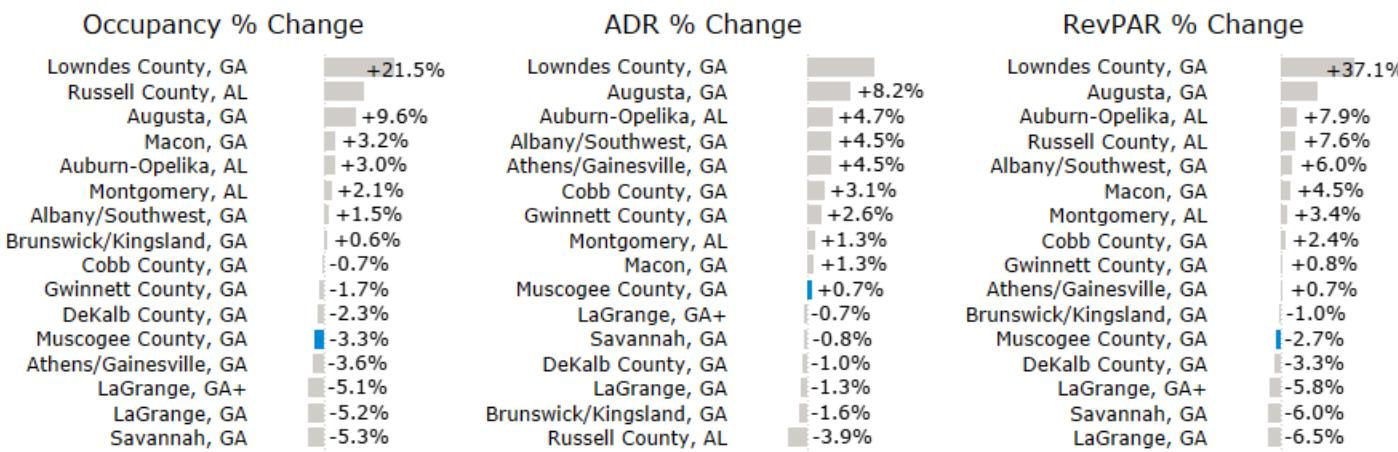
	OCC	% CHG	ADR	% CHG	RevPAR	% CHG	
Mar	Muscogee County, GA	61.3%	-4.0%	\$103	+1.9%	\$63	-2.2%
	Albany/Southwest, GA	59.6%	+1.1%	\$98	+5.3%	\$59	+6.5%
	Athens/Gainesville, GA	62.6%	-4.3%	\$140	+1.0%	\$87	-3.4%
	Auburn-Opelika, AL	63.3%	+7.0%	\$130	+9.3%	\$82	+16.9%
	Augusta, GA	69.0%	+13.2%	\$107	+14.4%	\$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%
Apr	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%
	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%
May	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%
	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%
Source: STR	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



% Change vs. Previous Year



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Monthly Performance by Market

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
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Mar

Columbus	64.3%	-9.3%	\$157	+10.3%	\$101	+0.0%
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Apr

Columbus	64.4%	+5.1%	\$162	+12.5%	\$104	+18.2%
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May

Columbus	61.4%	+0.7%	\$170	+16.1%	\$104	+16.9%
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Calendar Year-to-Date Performance

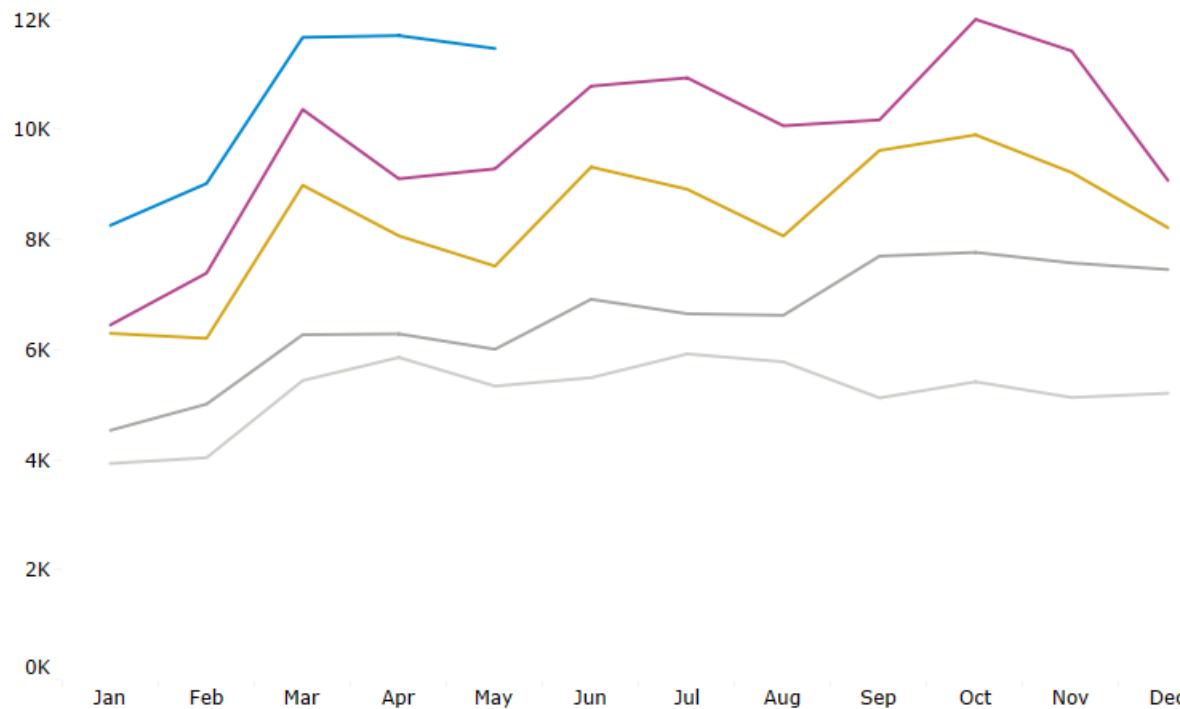
Columbus
All Properties

Occupancy 59.8% +0.0%	ADR \$156 +13.4%	RevPAR \$93 +13.4%	Supply 87.2K +22.4%	Demand 52.1K +22.4%	Revenue \$8.1M +38.8%
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Short Term Rental Demand by Month

Last Five Calendar Years

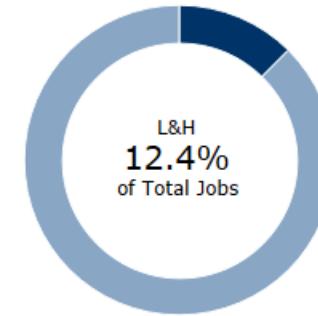
2021 2022 2023 2024 2025





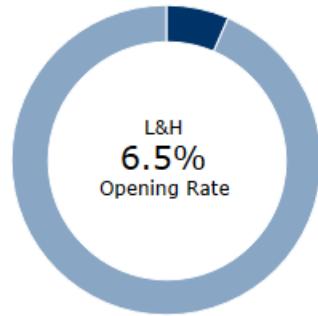
Total Leisure & Hospitality Jobs

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



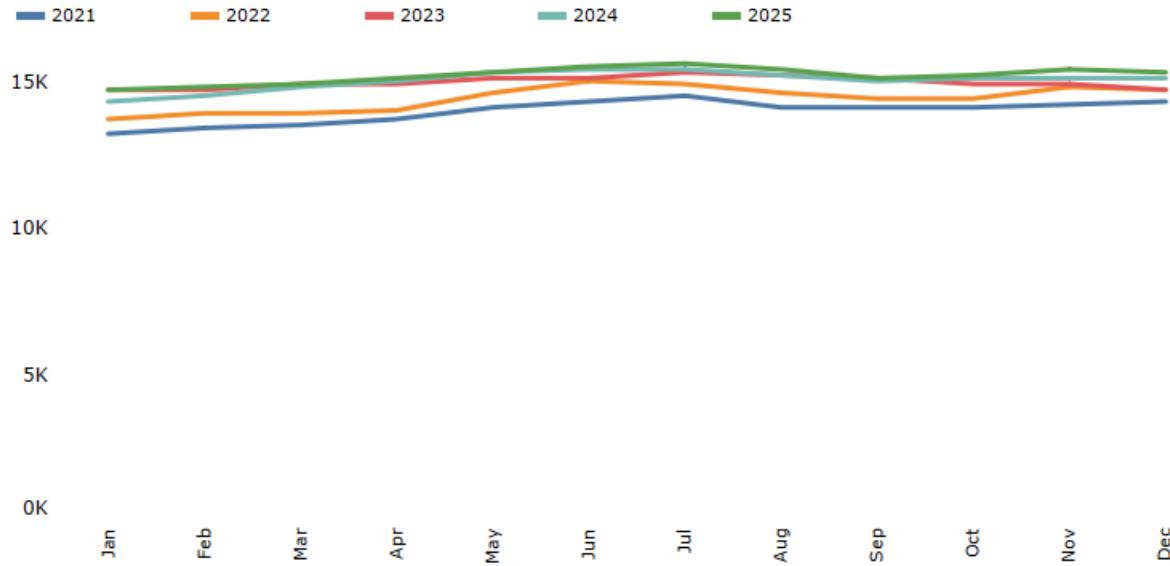
Leisure & Hospitality Job Openings

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



Employment Recovery

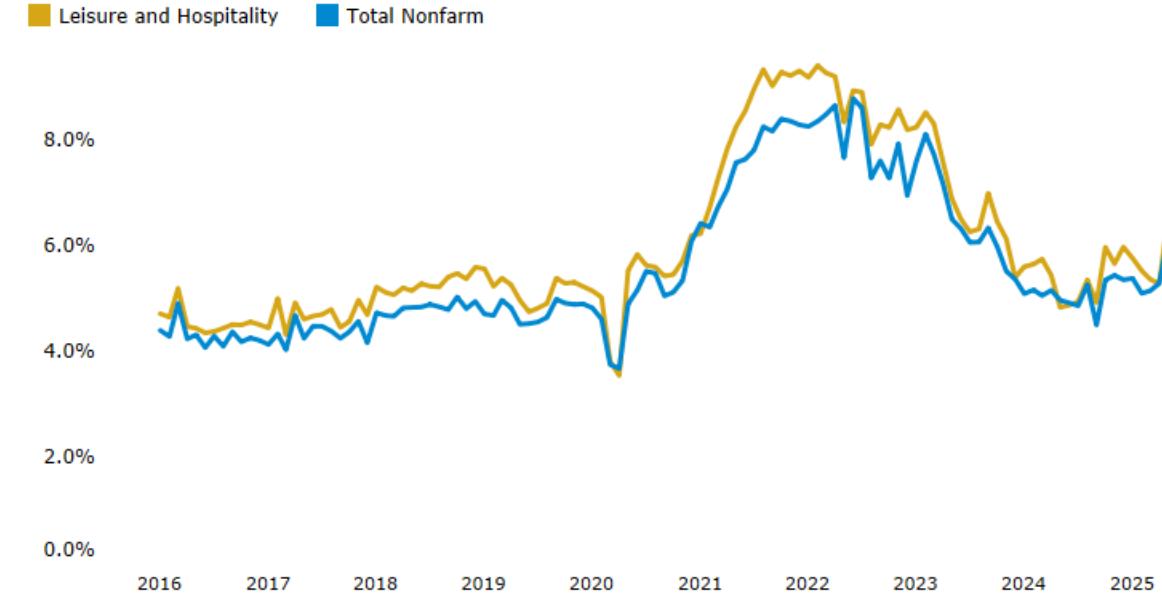
Leisure & Hospitality Jobs (Thousands)



Source: Bureau of Labor Statistics

Job Opening Rate

Share of total available jobs that are not filled



Source: Tourism Economics

Airport TSA Checkpoint Volume & Visitor Origins

ATL - Hartsfield - Jackson Atlanta International



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Monthly TSA Checkpoint Volume

May 2025 Volume

2.8M

-0.9% YOY

Year-to-Date TSA Checkpoint Volume & Visitor Origins

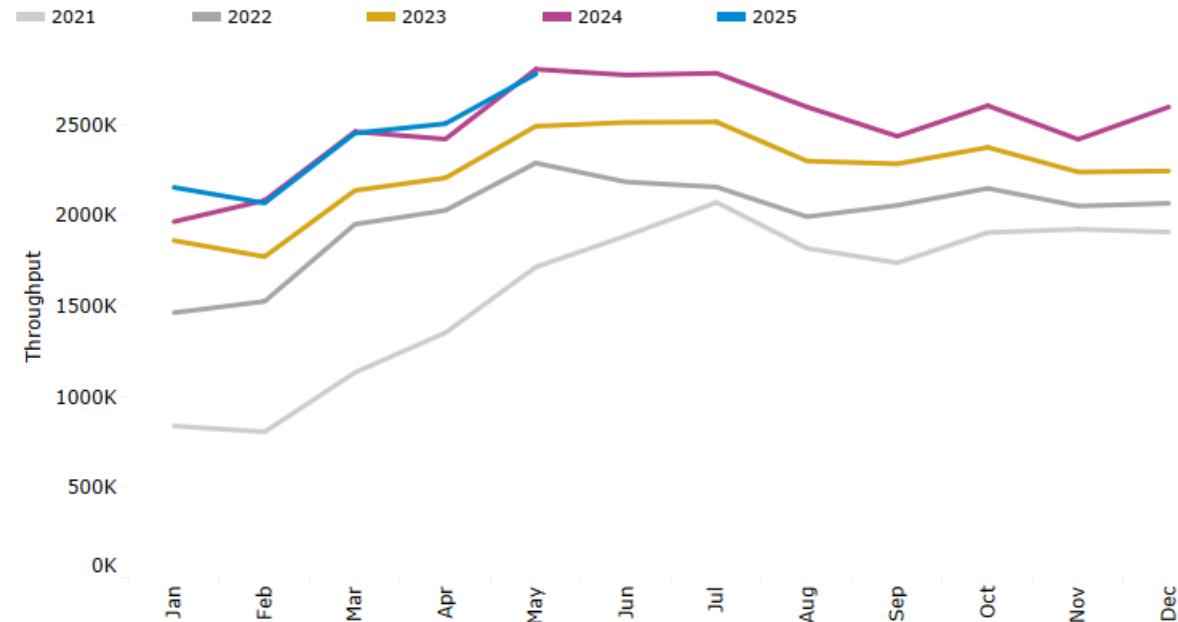
Jan - May 2025 Volume

12.0M

+1.9% YOY

TSA Checkpoint Volume by Month

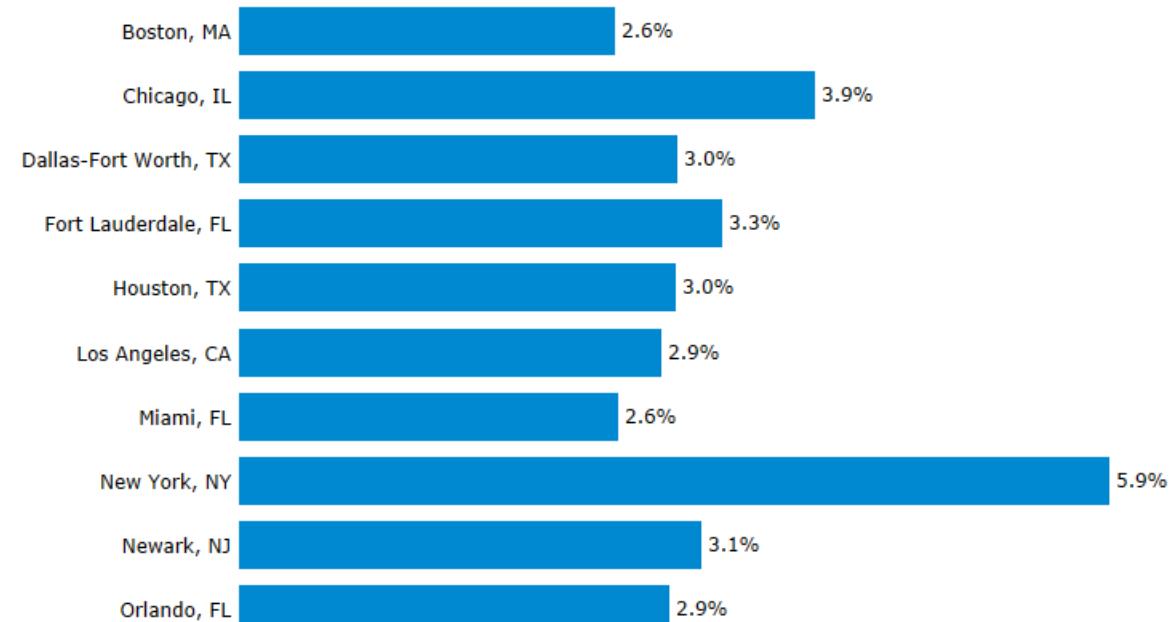
Last Five Calendar Years



Source: Transportation Security Administration

Top Origin Markets - Air

Jan - May 2025 Visitor Arrivals



Source: OAG

Source: Transportation Security Administration

Powered by Symphony | Tourism Economics



May 2025 Domestic Visits



1.8 days
Avg. Length of Stay

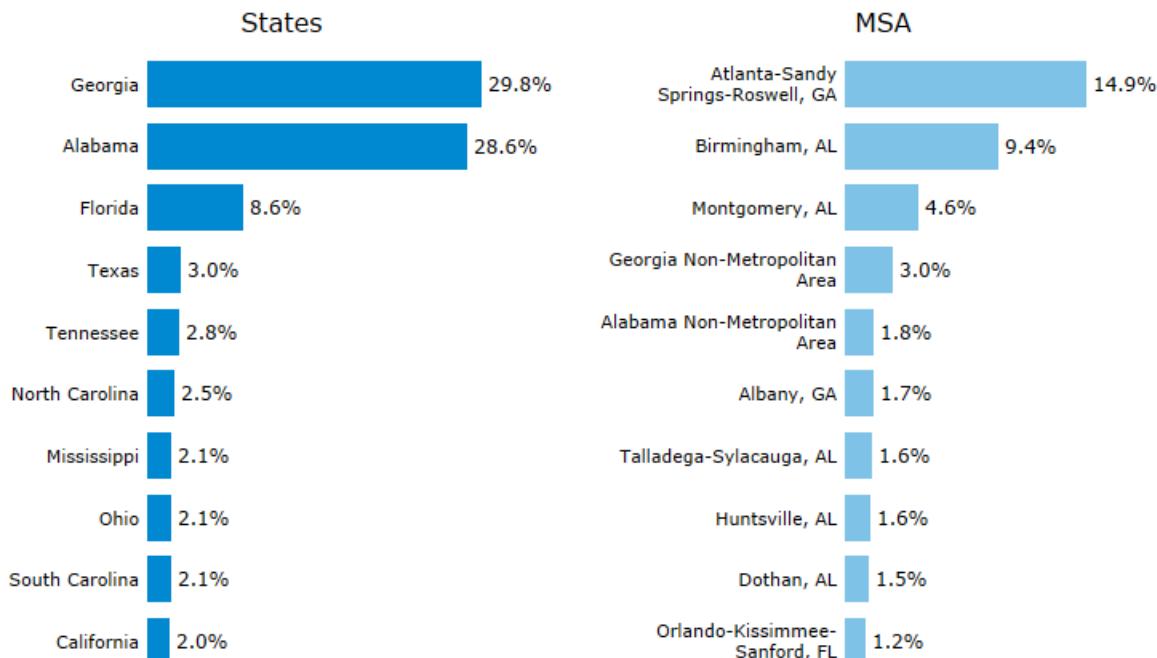


74%
Overnight Trip Share



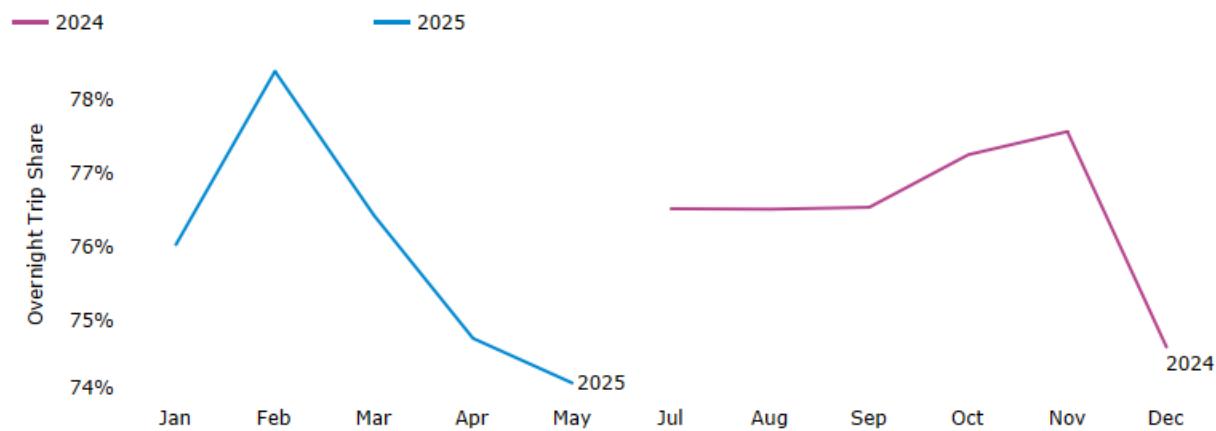
72%
Repeat Trip Share

Top Origin Markets

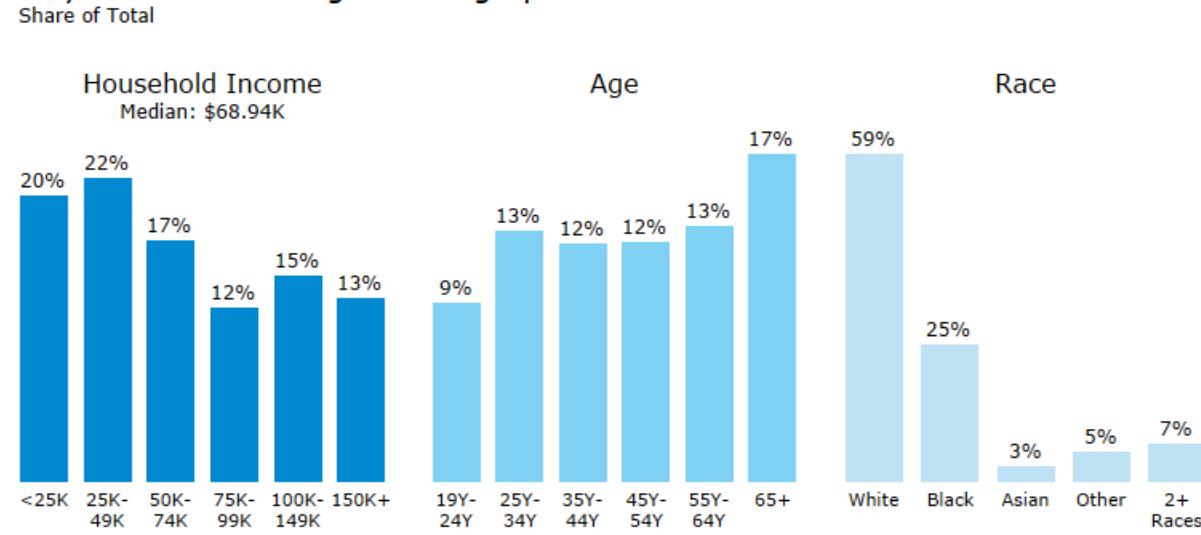


Domestic Visitor Trends & Characteristics

Overnight Trip Share by Month

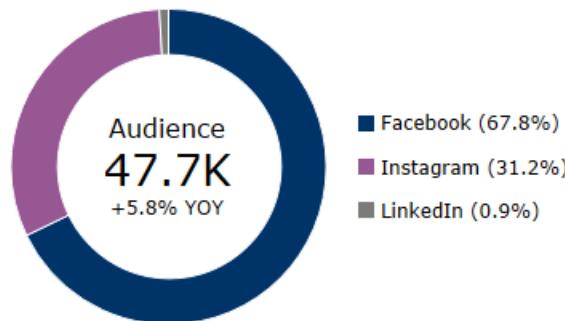


May 2025 Visitor Origin Demographics

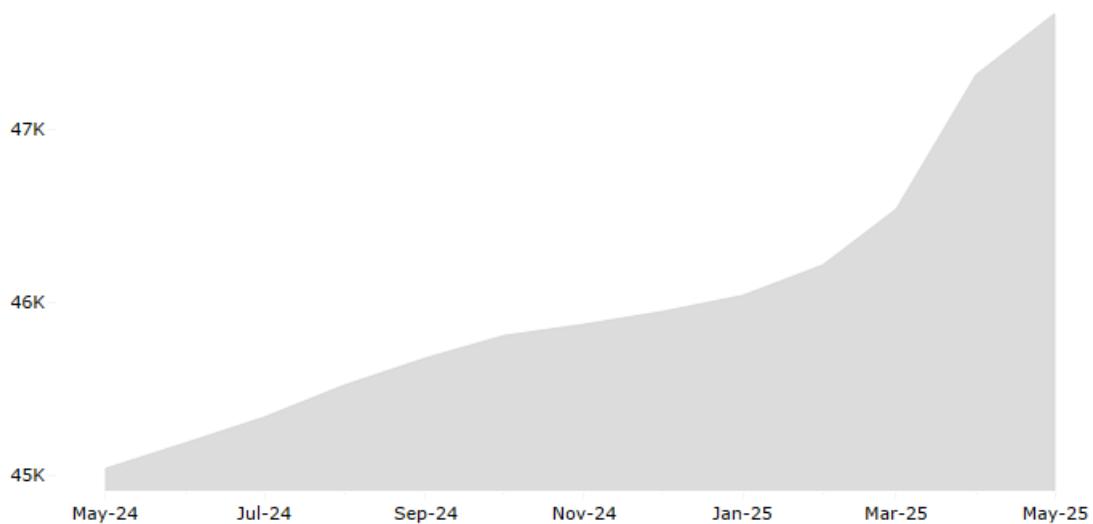




Audience Overview



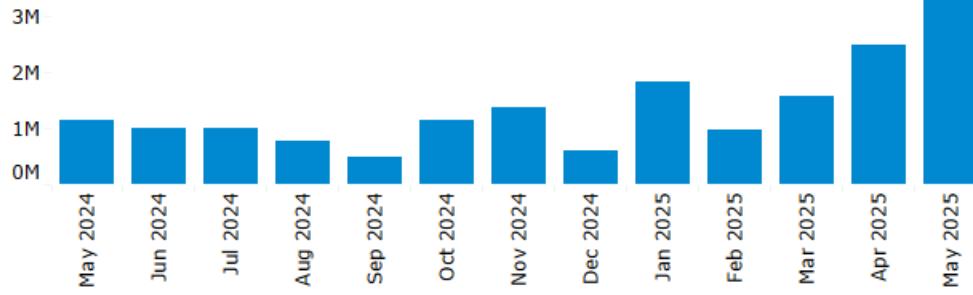
Audience by Month



Engagements & Impressions

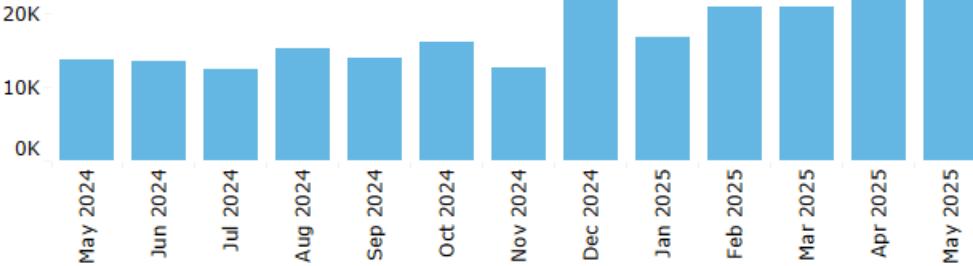
Impressions

May 2025
3.3M
+195.3% YOY



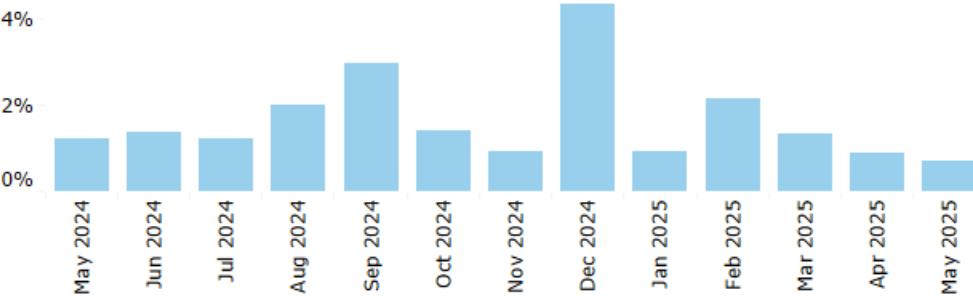
Engagements

May 2025
23.1K
+68.5% YOY



Engagement Rate

May 2025
0.7%
-0.5% pt YOY



Website Performance Summary

May 2025 | Properties: All



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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

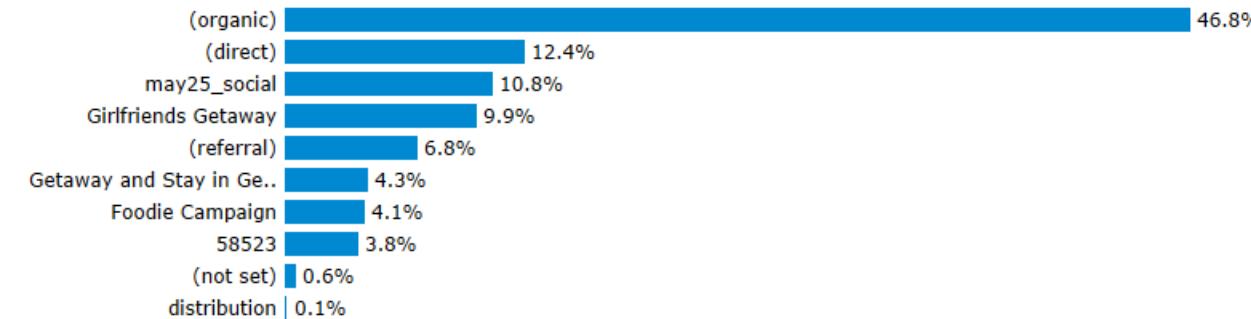


Avg. Session Duration
00:01:58
+28 sec YOY

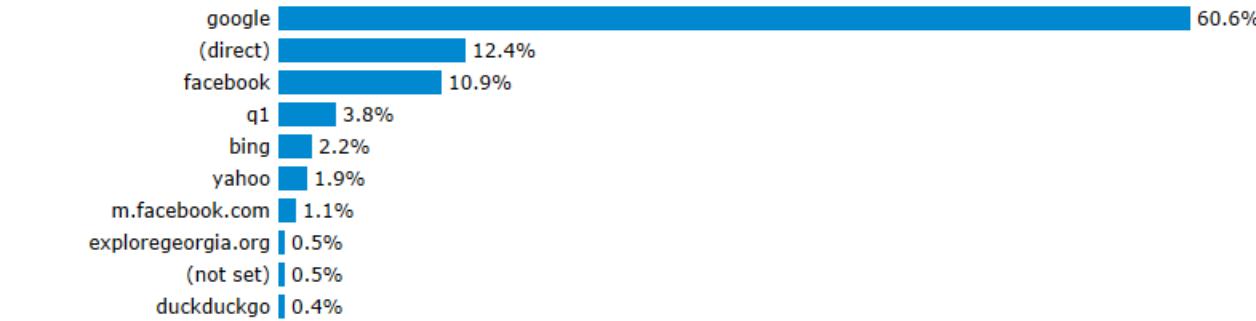


Bounce Rate
46.2%
-8.73% pt YOY

Campaigns

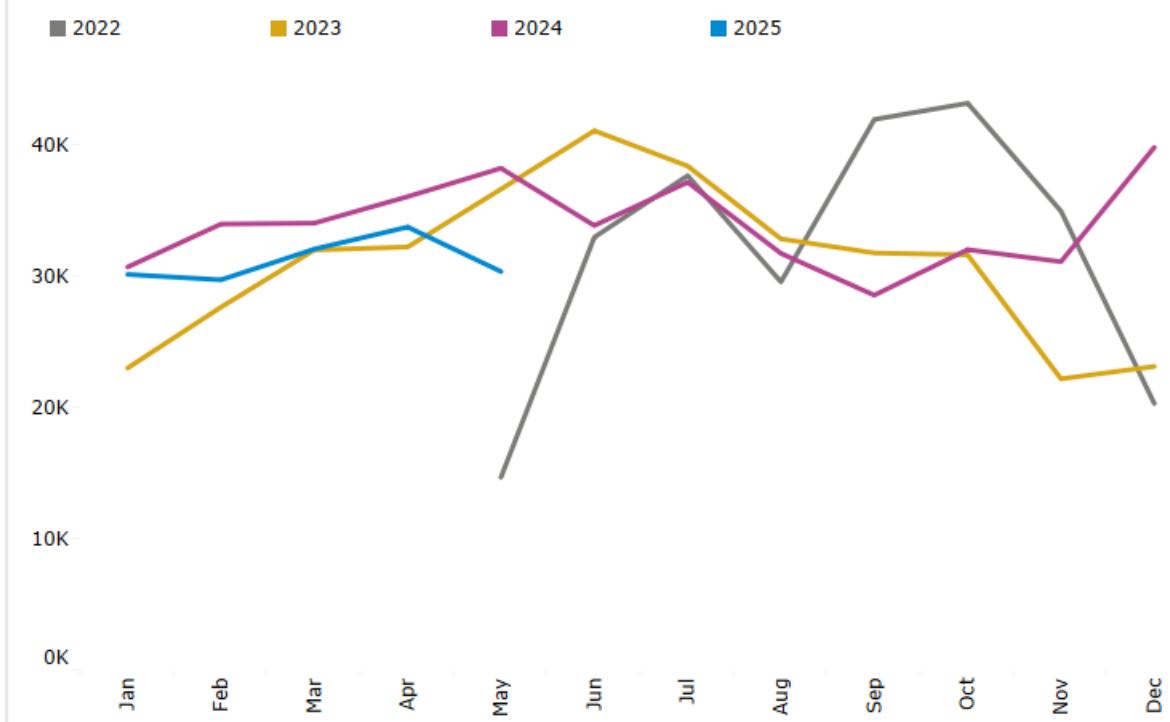


Sources



Sessions Analysis

Monthly Trend



Social Media Performance by Platform

May 2025



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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

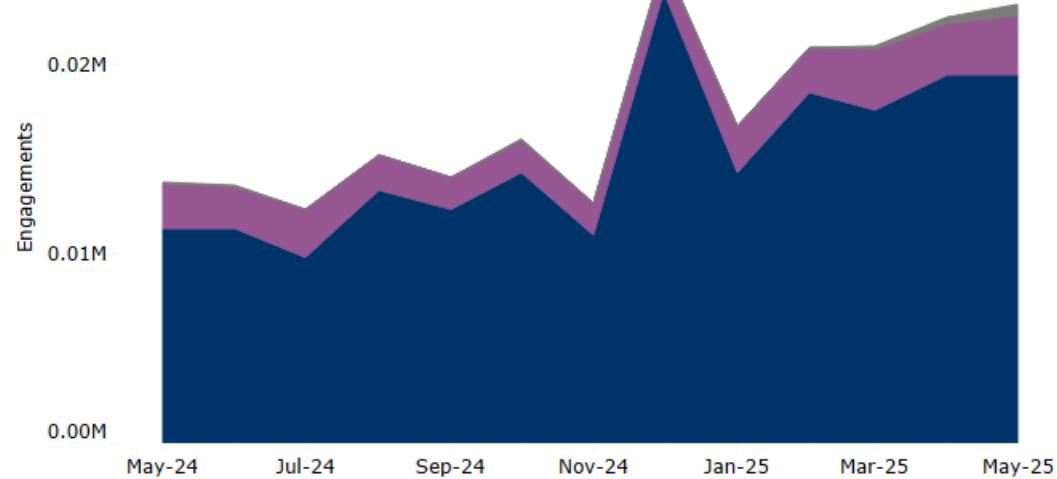
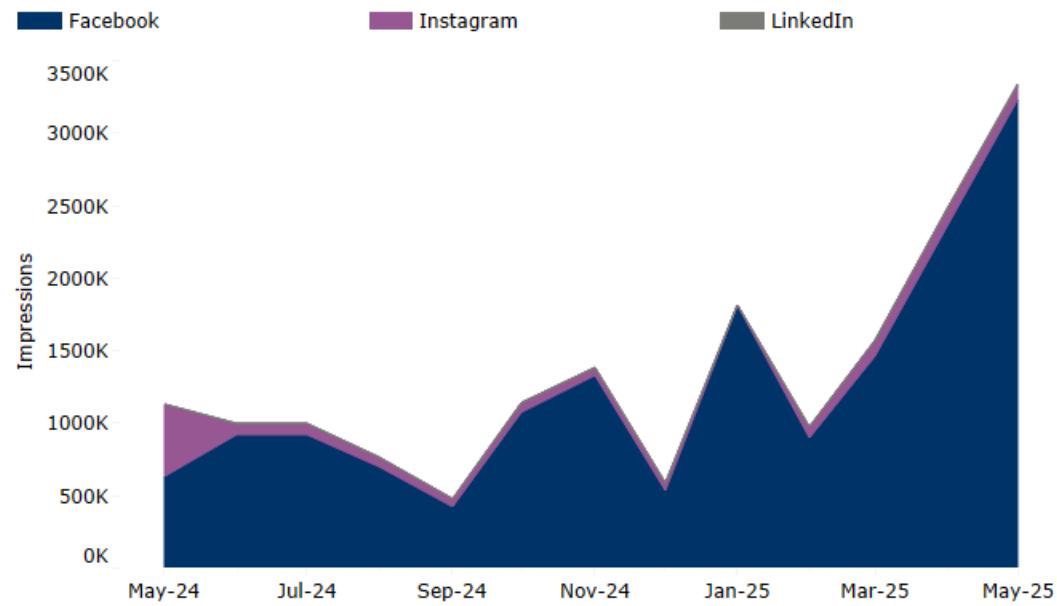
Engagement Rate	3.1%
Impressions	101,269
Video Views	5,418
Engagements	3,118
Comments	109
Reactions	2,517
Saves	
Shares	395

LinkedIn



Audience
445

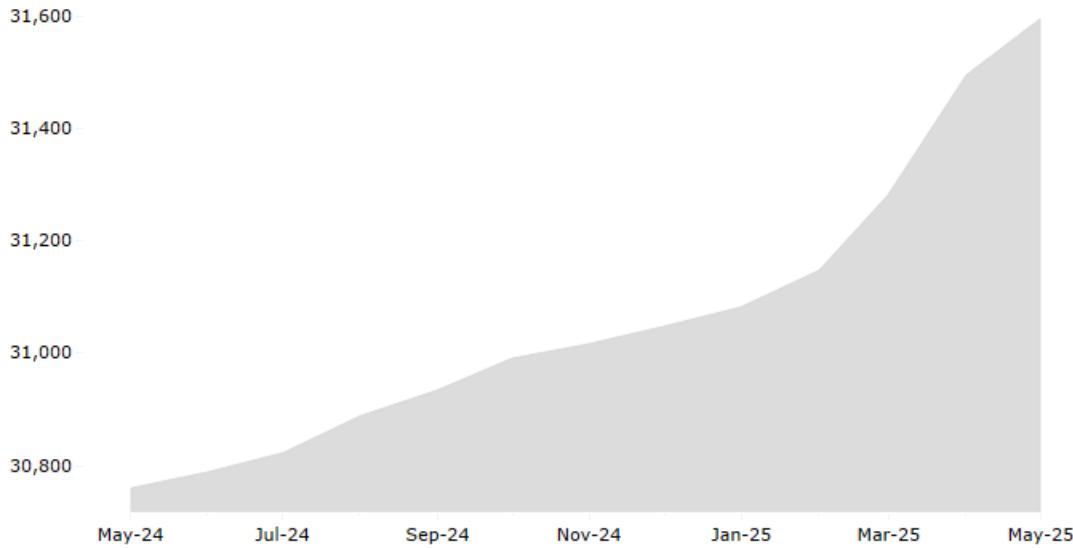
Engagement Rate	12.1%
Impressions	5,355
Video Views	
Engagements	646
Comments	37
Reactions	295
Shares	5
Post Link Clicks	309



Audience Overview

Audience
May 2025
31.6K
+2.7% YOY

Audience by Month



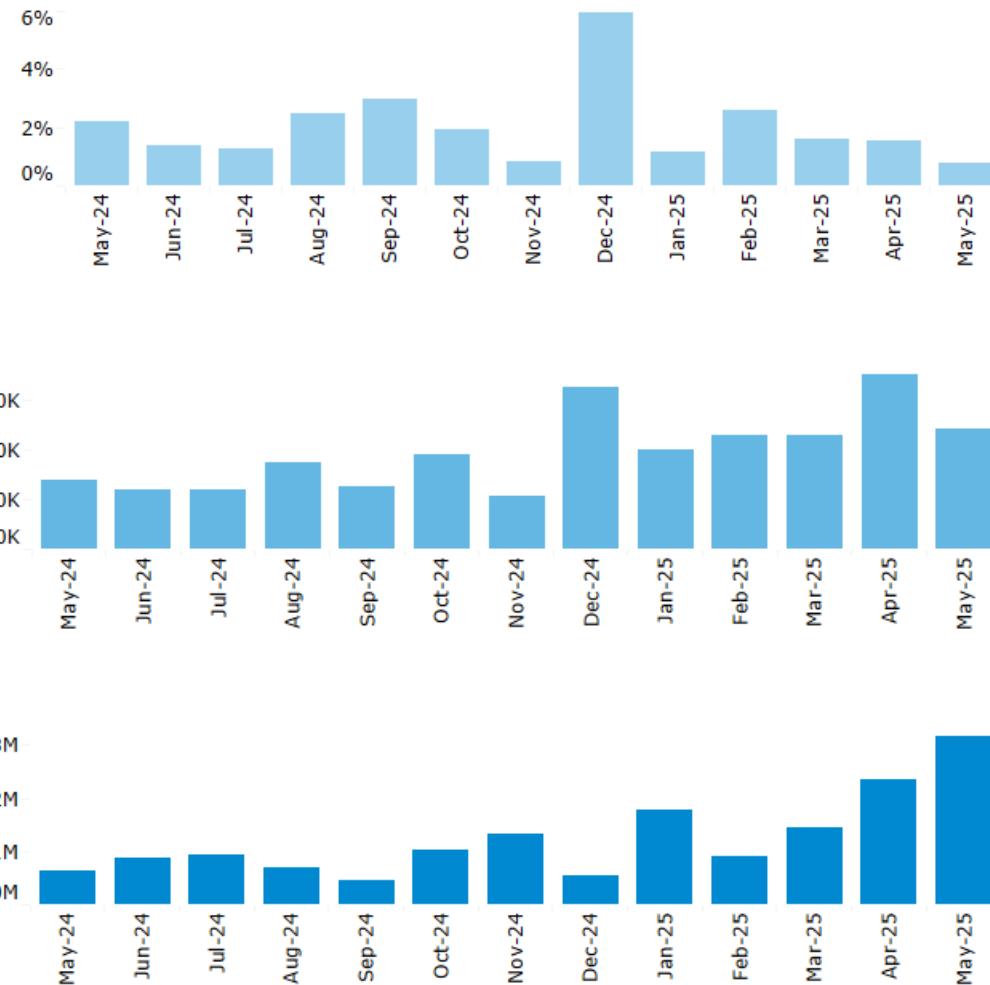
Engagements & Impressions

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

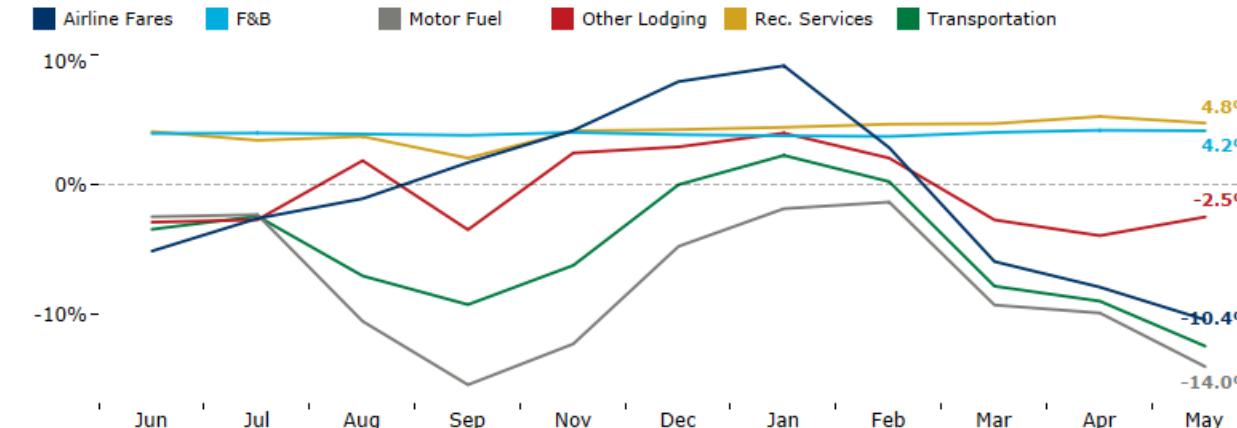


National Travel Trends



Travel Price Index

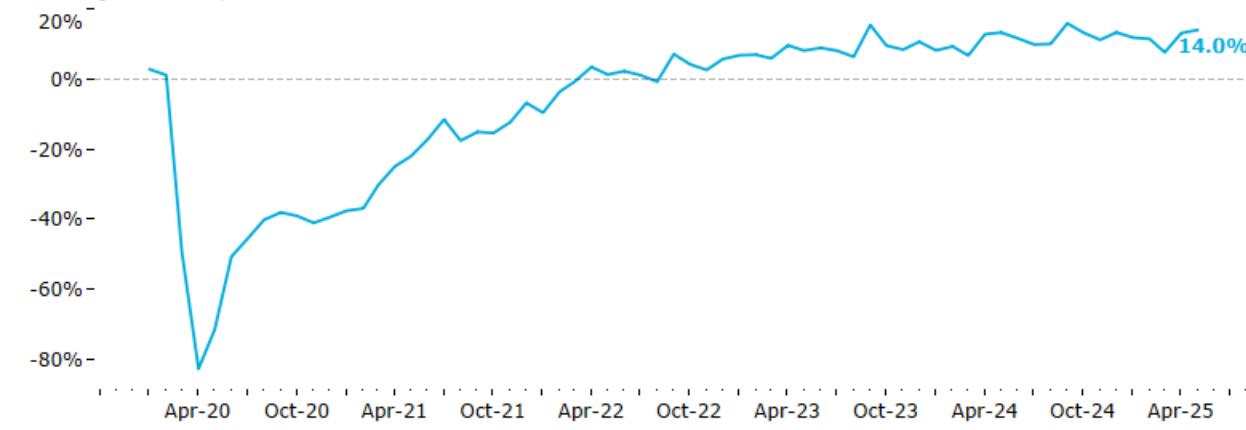
% Change Relative to Same Month in Previous Year | Last 12 Months



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

Travel Spending (% change vs 2019)

% Change vs. 2019 | U.S. total

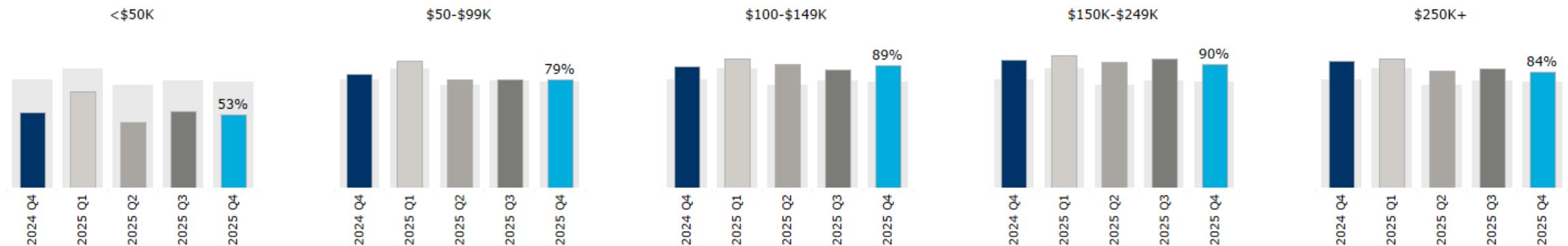


Source: Tourism Economics via U.S. Travel Recovery Tracker

Planning Leisure Travel Within the Next 12 Months

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

■ 2024 Q4 ■ 2025 Q1 ■ 2025 Q2 ■ 2025 Q3 ■ 2025 Q4



Note: Light gray bars represent the average for all survey respondents

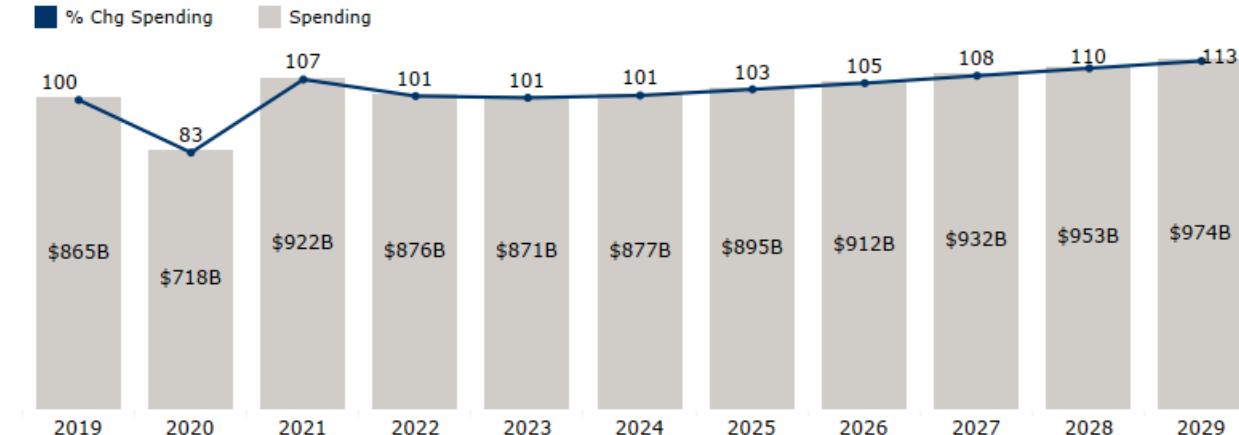
Source: MMGY Global's Portait of American Traveler

Domestic Travel Forecast

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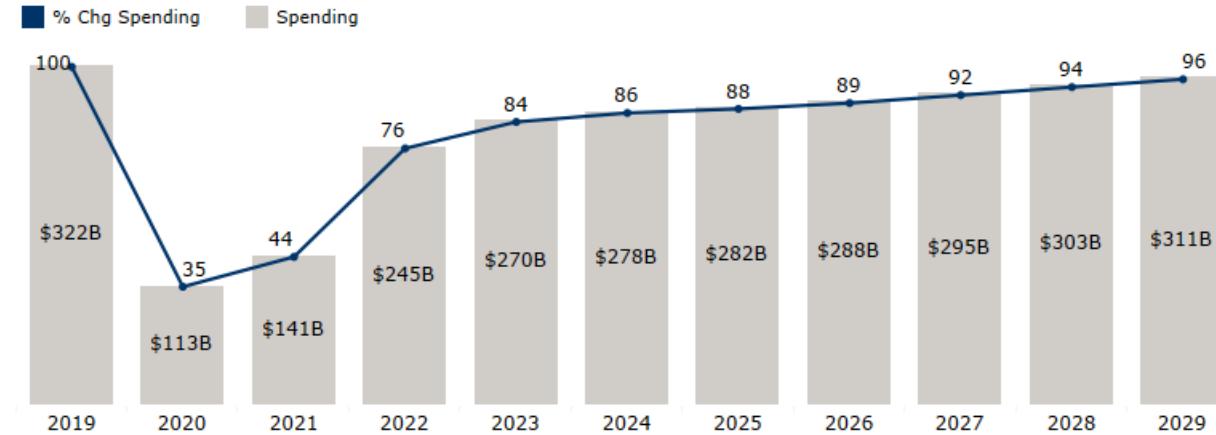
Real Domestic Leisure Travel Spending

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



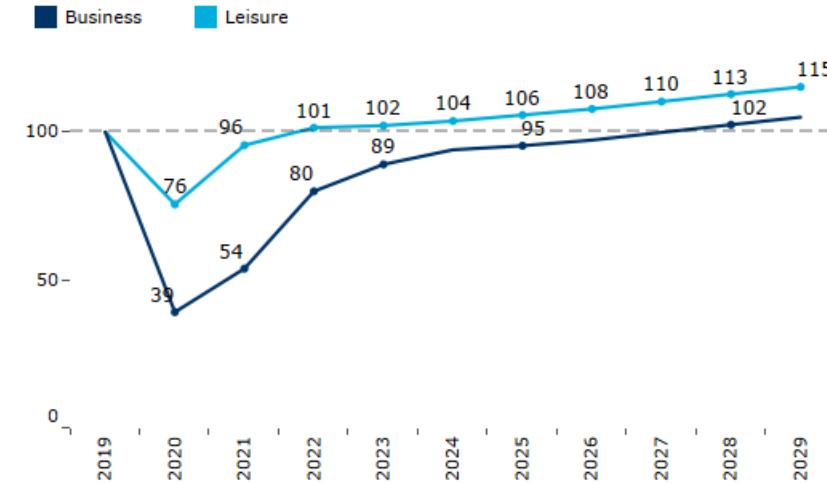
Real Domestic Business Travel Spending

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



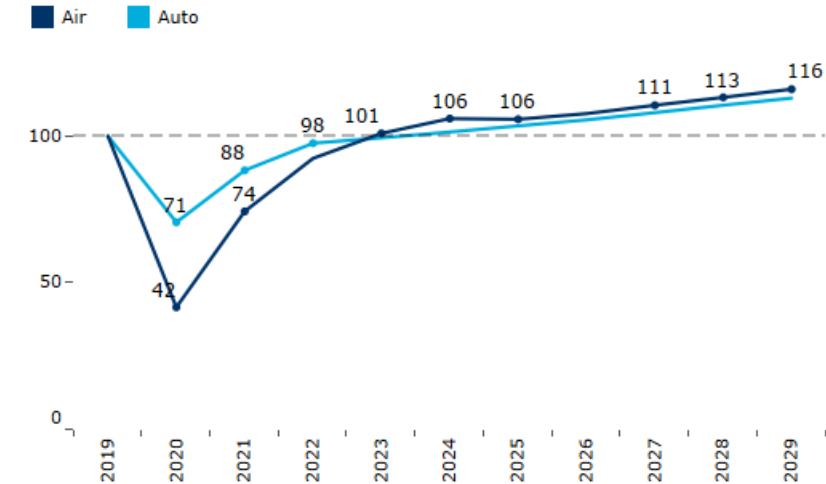
Leisure vs. Business Travel Volume

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



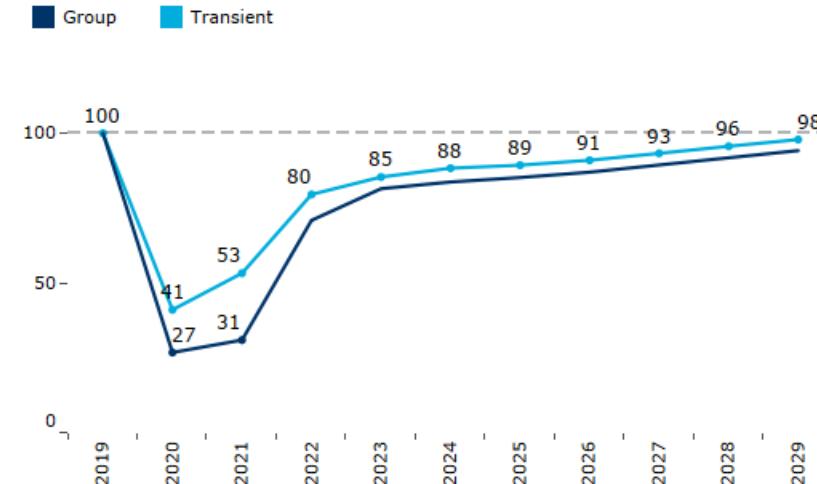
Auto vs. Air Travel Volume

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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