



Monthly Summary Report

July 2025

Month
July 2025

Highlights

In Muscogee County, demand is up 2.5% YTD YOY while supply has increased 5.5% YTD, resulting in a 2.7% decline in Occ. Revenue is up 2.3% YTD, with July generating \$8.8M, a 0.9% YOY increase.

L&H employment rose 0.6% YOY and is 1.3% higher than July 2019 levels. The job opening rate stood at 5.3% this month, with openings up 10.6% YOY. L&H jobs now represent 6.3% of total employment in the Columbus, GA-AL MSA.

On the digital front, Visit Columbus social channels recorded a 329% YOY increase in engagements and a 165% YOY increase in impressions. Net new audience growth totaled 644 this month, with 389 from Facebook, the largest gain. Facebook also drove a 200% YOY increase in traffic to VisitColumbusGA.com, although the bounce rate remains elevated at 86.4%.

U.S. hotel performance softened in July, with occupancy down 1.0% and RevPAR off 1.1% YOY, while ADR was flat. Year-to-date, ADR is up 1.1% and RevPAR 0.4%. Luxury outperformed with rate and demand gains, while Economy and Independents posted the steepest declines.

The BLS revised their May and June job reports down by a combined 258K jobs, slightly raising the unemployment rate to 4.2% after gaining only 73K jobs in July. U.S. 12-month inflation was 2.7%. Consumer prices were up 1% from the start of the year, but 24.7% more than five years ago.



Source: STR



Source: STR



Source: TSA



Source: Sprout Social



Source: Meta



Source: Google Analytics



Source: Azira



Source: Bureau of Labor Statistics

Lodging Summary

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



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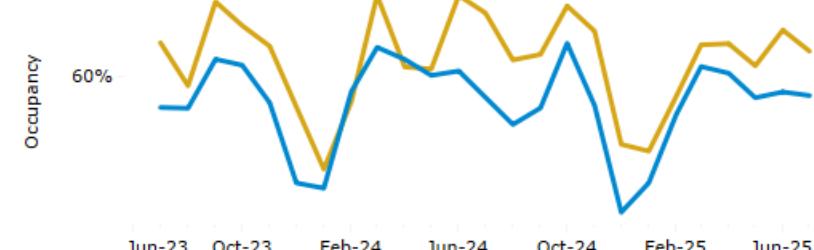
Aggregate Lodging Performance

Sources: STR & AirDNA

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Jul 2025	58.1%	\$109.23	\$63.51	172.3K	100.2K	\$10.9M
YOY % Change	-0.3% YOY	+1.9% YOY	+1.6% YOY	+3.6% YOY	+3.3% YOY	+5.2% YOY
Year-to-Date	57.0%	\$107.60	\$61.29	1.2M	666.1K	\$71.7M
YTD YOY % Change	-2.8% YOY	+2.7% YOY	-0.2% YOY	+7.0% YOY	+3.9% YOY	+6.7% YOY

Occupancy by Month

Hotels Short Term Vacation Rentals



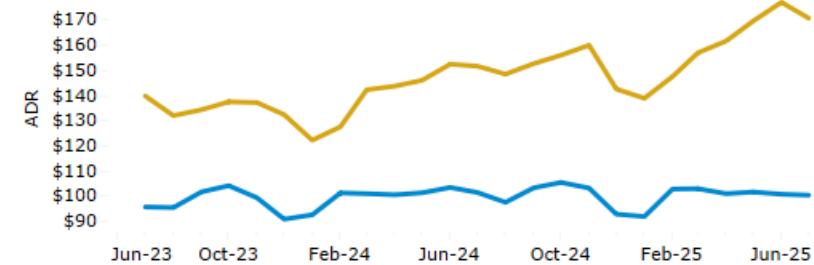
Hotel Performance

Source: STR

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Jul 2025	57.5%	\$100.47	\$57.73	152.6K	87.7K	\$8.8M
YOY % Change	+0.4% YOY	-1.0% YOY	-0.6% YOY	+1.5% YOY	+1.9% YOY	+0.8% YOY
Year-to-Date	56.4%	\$100.51	\$56.73	1.0M	589.3K	\$59.2M
YTD YOY % Change	-3.0% YOY	-0.1% YOY	-3.1% YOY	+5.4% YOY	+2.2% YOY	+2.1% YOY

ADR by Month

Hotels Short Term Vacation Rentals



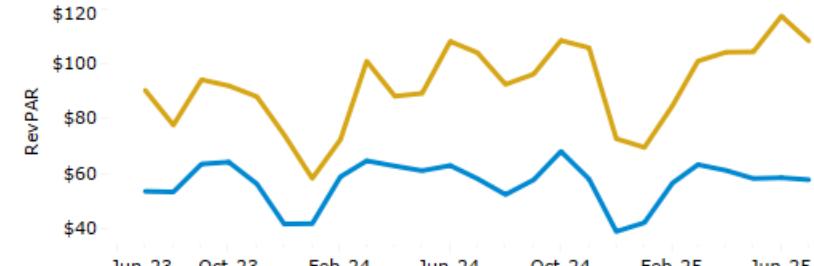
Short Term Vacation Rental Performance

Source: AirDNA (All Properties)

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Jul 2025	63.4%	\$170.77	\$108.28	19.7K	12.5K	\$2.1M
YOY % Change	-7.5% YOY	+12.6% YOY	+4.1% YOY	+23.4% YOY	+14.1% YOY	+28.5% YOY
Year-to-Date	61.3%	\$161.99	\$99.26	125.3K	76.8K	\$12.4M
YTD YOY % Change	-2.4% YOY	+13.5% YOY	+10.8% YOY	+22.3% YOY	+19.4% YOY	+35.6% YOY

RevPAR by Month

Hotels Short Term Vacation Rentals



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Monthly Performance by Market

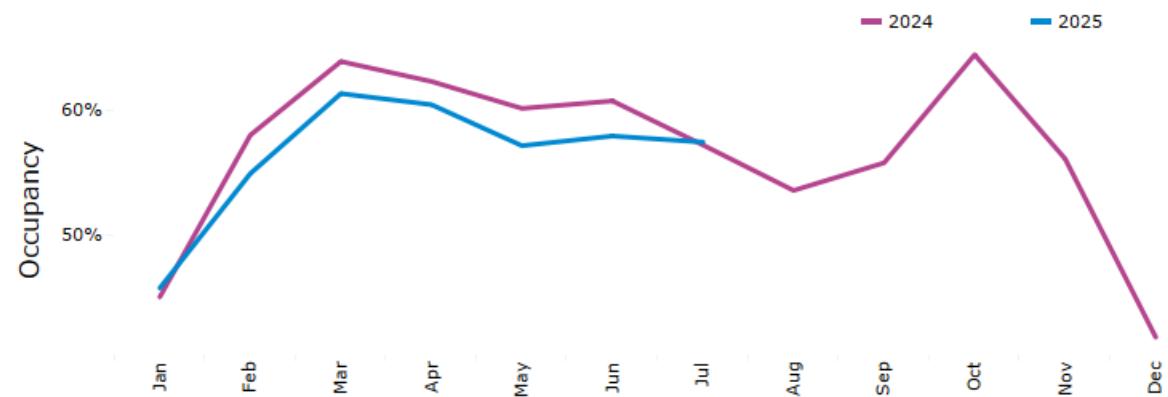
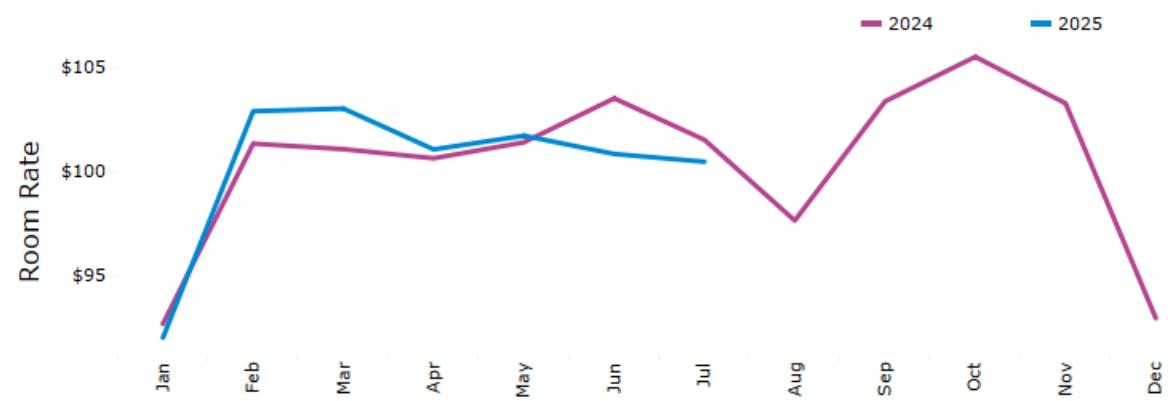
	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
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May	Muscogee County, GA	57.2%	-5.0%	\$102	+0.3%	\$58	-4.7%
	Russell County, AL	48.9%	+11.9%	\$100	-7.8%	\$49	+3.1%
Jun	Muscogee County, GA	57.9%	-4.6%	\$101	-2.6%	\$58	-7.1%
	Russell County, AL	48.1%	+8.0%	\$96	-11.5%	\$46	-4.4%
Jul	Muscogee County, GA	57.5%	+0.4%	\$100	-1.0%	\$58	-0.6%
	Russell County, AL	48.5%	+10.4%	\$100	-5.8%	\$49	+4.1%

Calendar Year-to-Date Performance

Muscogee County, GA

Occupancy	56.4%	ADR	\$101	RevPAR	\$57	Supply	1.0M	Demand	589.3K	Revenue	\$59.2M
	-3.0%		-0.1%		-3.1%		+5.4%		+2.2%		+2.1%



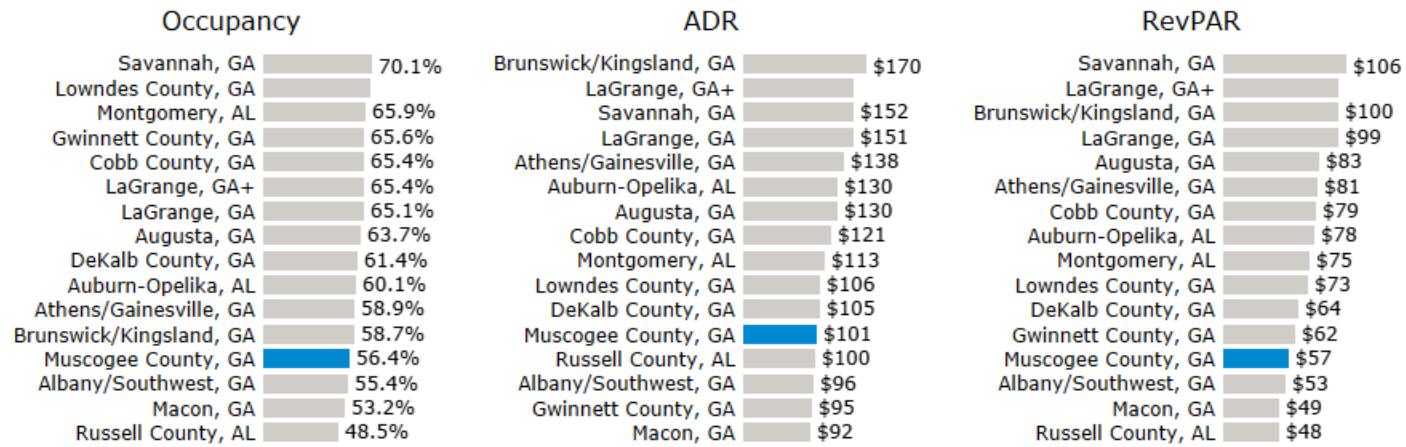


Monthly Performance by Market

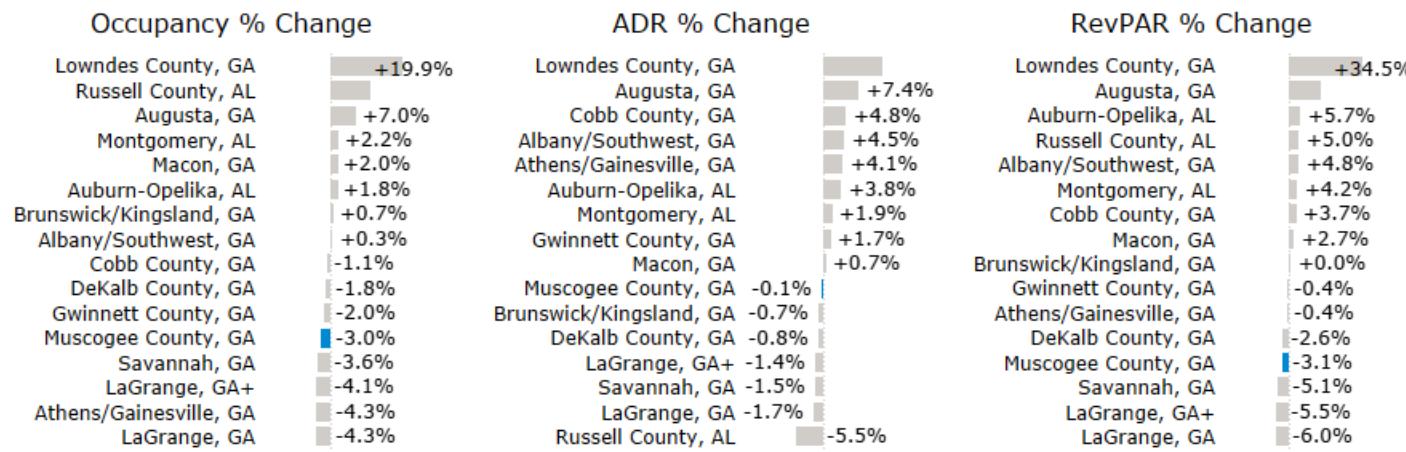
	OCC	% CHG	ADR	% CHG	RevPAR	% CHG	
May	Muscogee County, GA	57.2%	-5.0%	\$102	+0.3%	\$58	-4.7%
	Albany/Southwest, GA	55.2%	-1.8%	\$99	+3.8%	\$55	+1.9%
	Athens/Gainesville, GA	60.9%	-4.0%	\$156	+7.3%	\$95	+3.0%
	Auburn-Opelika, AL	61.0%	+0.2%	\$153	+3.9%	\$94	+4.1%
	Augusta, GA	60.1%	+2.8%	\$99	+5.5%	\$59	+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%
	Muscogee County, GA	57.9%	-4.6%	\$101	-2.6%	\$58	-7.1%
	Albany/Southwest, GA	54.3%	-4.3%	\$95	+3.7%	\$52	-0.8%
	Athens/Gainesville, GA	60.8%	-4.2%	\$139	+5.4%	\$84	+1.0%
	Auburn-Opelika, AL	65.9%	+2.0%	\$128	+2.8%	\$85	+4.9%
	Augusta, GA	59.9%	+0.5%	\$97	+2.5%	\$58	+3.0%
	Brunswick/Kingsland, ..	60.5%	+0.0%	\$182	+1.1%	\$110	+1.0%
	Cobb County, GA	69.4%	-2.7%	\$134	+4.3%	\$93	+1.5%
	DeKalb County, GA	61.6%	-3.3%	\$103	-3.4%	\$63	-6.6%
	Gwinnett County, GA	66.8%	-4.0%	\$97	+0.5%	\$65	-3.5%
	LaGrange, GA	69.5%	-7.3%	\$156	+1.9%	\$108	-5.5%
	LaGrange, GA+	69.5%	-7.3%	\$156	+1.9%	\$108	-5.5%
	Lowndes County, GA	69.9%	+18.4%	\$106	+9.6%	\$74	+29.8%
	Macon, GA	53.5%	-4.7%	\$92	+0.0%	\$49	-4.7%
	Montgomery, AL	67.8%	+2.2%	\$117	+4.3%	\$79	+6.6%
	Russell County, AL	48.1%	+8.0%	\$96	-11.5%	\$46	-4.4%
	Savannah, GA	70.6%	-4.6%	\$147	-6.1%	\$104	-10.4%
	Muscogee County, GA	57.5%	+0.4%	\$100	-1.0%	\$58	-0.6%
	Albany/Southwest, GA	52.9%	+0.5%	\$95	+5.3%	\$50	+5.8%
	Athens/Gainesville, GA	55.7%	-7.2%	\$125	+1.0%	\$70	-6.3%
	Auburn-Opelika, AL	59.0%	-2.7%	\$119	+0.8%	\$70	-1.9%
	Augusta, GA	64.9%	+3.3%	\$110	+4.1%	\$71	+7.5%
	Brunswick/Kingsland, ..	60.2%	+2.2%	\$193	+0.5%	\$116	+2.7%
	Cobb County, GA	69.2%	-0.7%	\$143	+10.9%	\$99	+10.1%
	DeKalb County, GA	65.5%	+1.9%	\$109	+2.0%	\$71	+3.9%
	Gwinnett County, GA	67.8%	-1.0%	\$95	-0.4%	\$64	-1.4%
	LaGrange, GA	70.2%	+3.4%	\$172	-6.8%	\$120	-3.6%
	LaGrange, GA+	70.2%	+3.4%	\$172	-6.8%	\$120	-3.6%
	Lowndes County, GA	62.6%	+14.3%	\$103	+12.3%	\$64	+28.4%
	Macon, GA	53.2%	+3.8%	\$89	-0.5%	\$47	+3.3%
	Montgomery, AL	65.3%	+2.6%	\$111	+2.0%	\$72	+4.7%
	Russell County, AL	48.5%	+10.4%	\$100	-5.8%	\$49	+4.1%
	Savannah, GA	70.7%	+4.3%	\$142	+1.6%	\$100	+5.9%

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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May

Columbus	61.4%	+0.7%	\$170	+16.1%	\$104	+16.9%
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Jun

Columbus	66.2%	-6.5%	\$177	+16.1%	\$117	+8.5%
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Jul

Columbus	63.4%	-7.5%	\$171	+12.6%	\$108	+4.1%
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Calendar Year-to-Date Performance

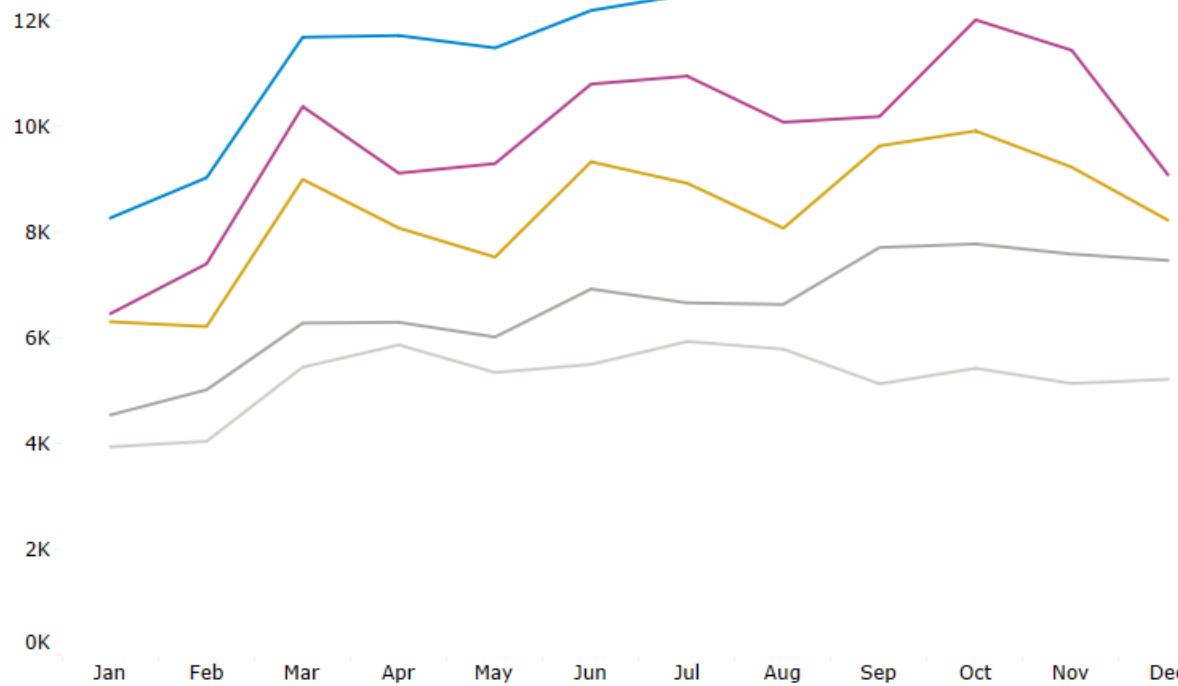
Columbus
All Properties

Occupancy 61.3% -2.4%	ADR \$162 +13.5%	RevPAR \$99 +10.8%	Supply 125.3K +22.3%	Demand 76.8K +19.4%	Revenue \$12.4M +35.6%
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Short Term Rental Demand by Month

Last Five Calendar Years

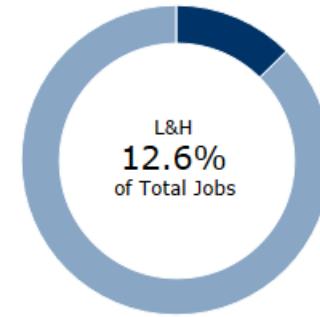
2021 2022 2023 2024 2025





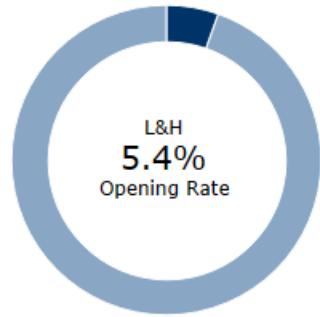
Total Leisure & Hospitality Jobs

L&H Jobs
as of July 2025
15.6K
+1.3% YOY | +2.0% vs. 2019



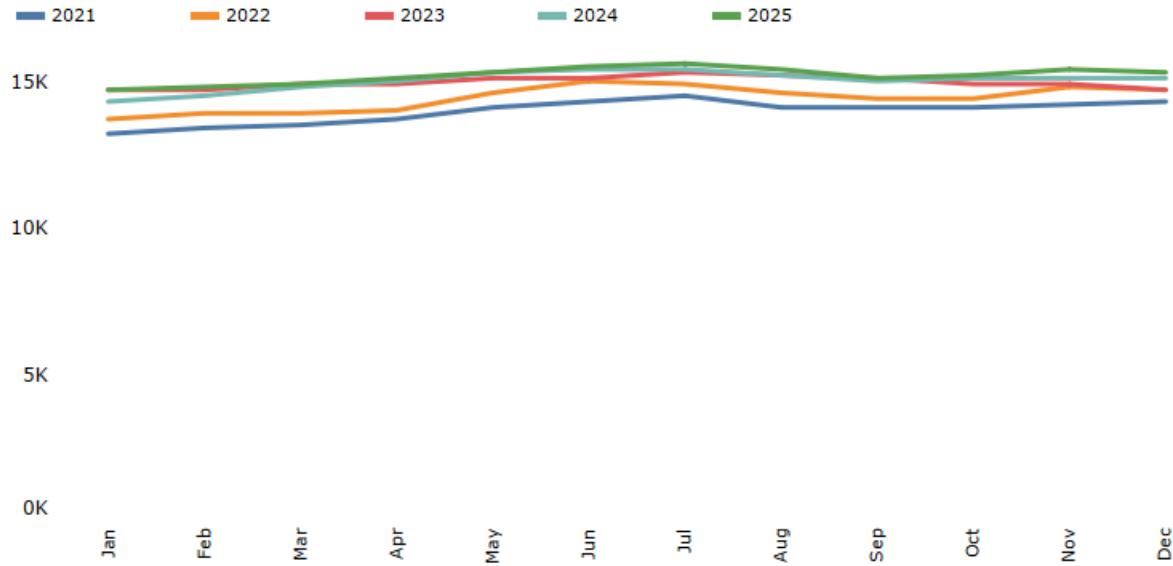
Leisure & Hospitality Job Openings

L&H Job Openings
as of July 2025
900
+12.1% YOY | +15.6% vs. 2019



Employment Recovery

Leisure & Hospitality Jobs (Thousands)

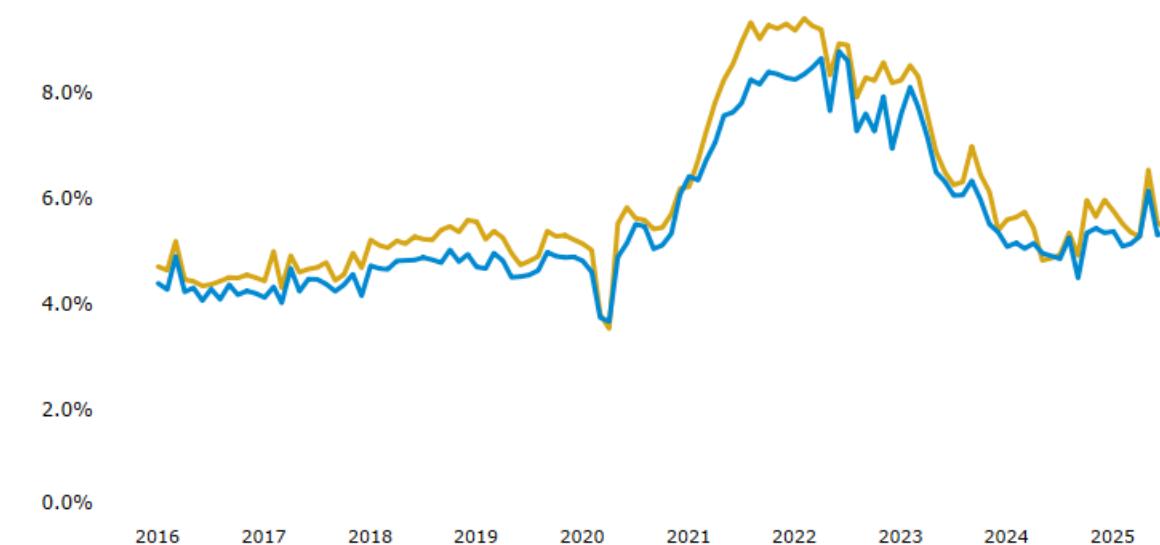


Source: Bureau of Labor Statistics

Job Opening Rate

Share of total available jobs that are not filled

■ Leisure and Hospitality ■ Total Nonfarm



Source: Tourism Economics

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Airport TSA Checkpoint Volume & Visitor Origins

ATL - Hartsfield - Jackson Atlanta International



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Monthly TSA Checkpoint Volume

July 2025 Volume

2.8M

+1.3% YOY

Year-to-Date TSA Checkpoint Volume & Visitor Origins

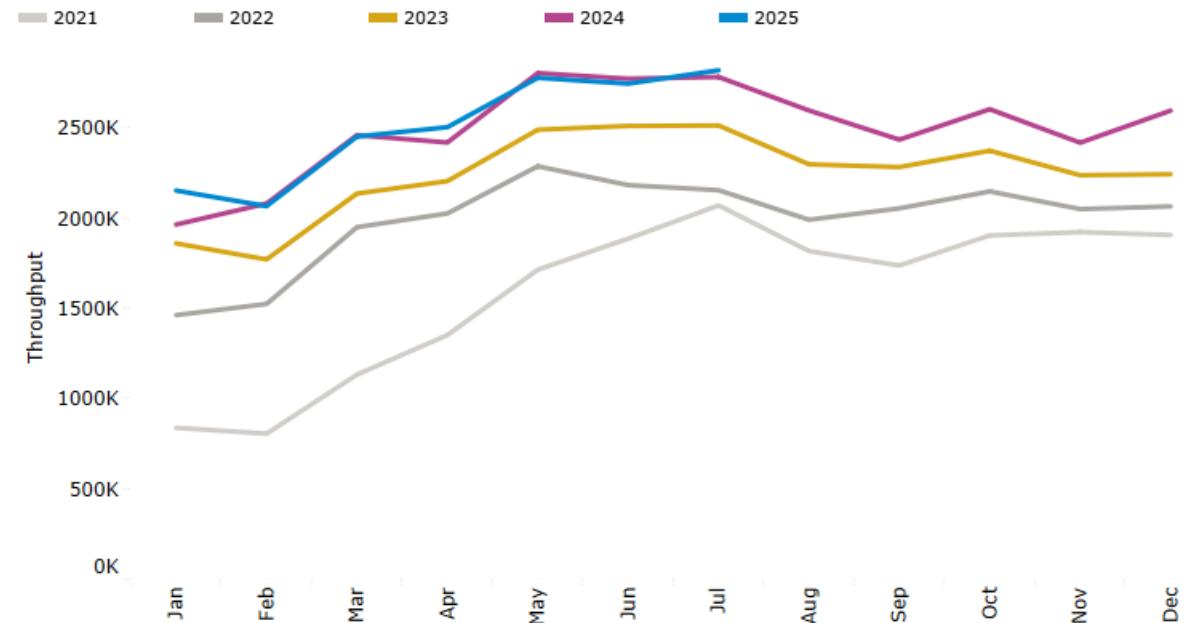
Jan - Jul 2025 Volume

17.5M

+1.4% YOY

TSA Checkpoint Volume by Month

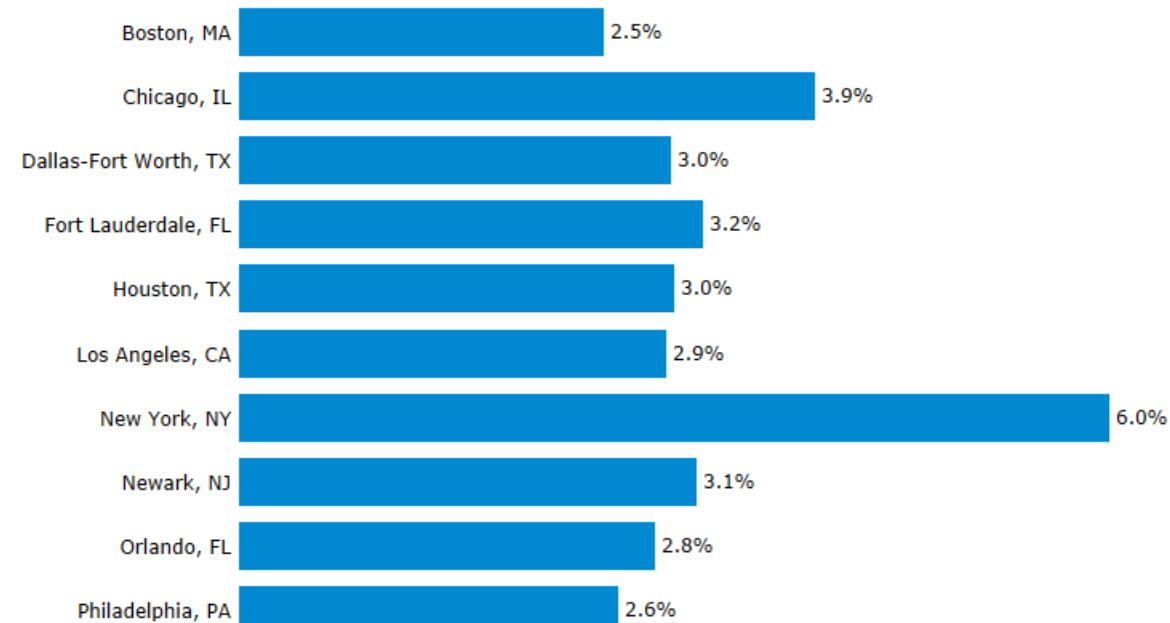
Last Five Calendar Years



Source: Transportation Security Administration

Top Origin Markets - Air

Jan - Jul 2025 Visitor Arrivals



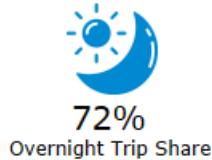
Source: OAG

Source: Transportation Security Administration

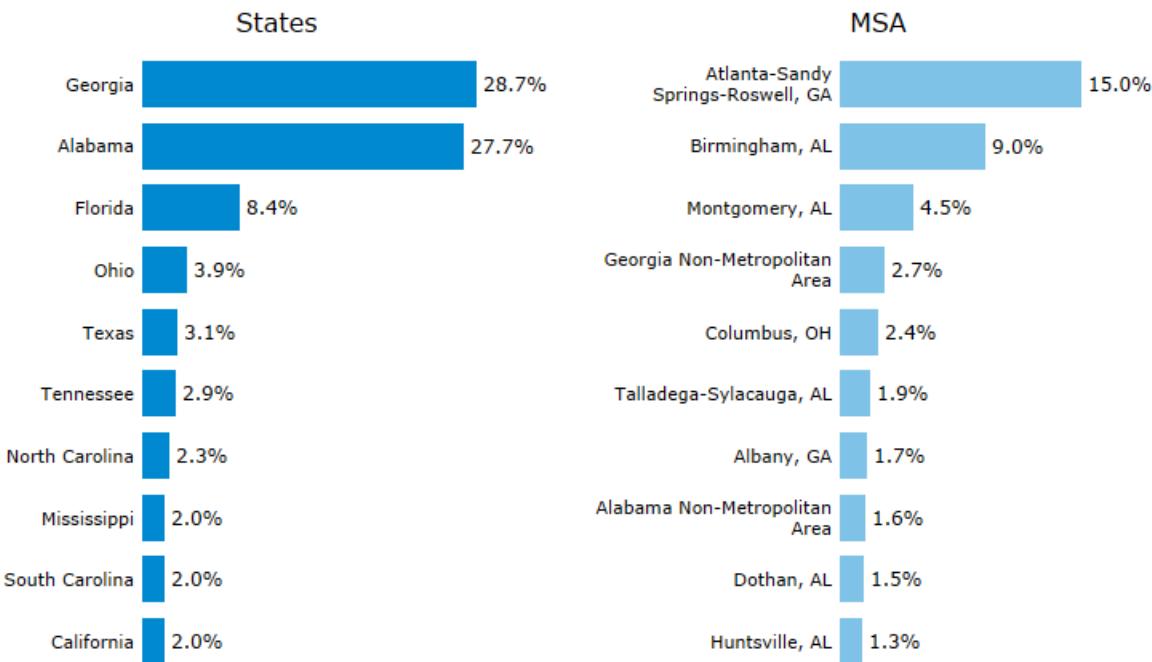
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July 2025 Domestic Visits

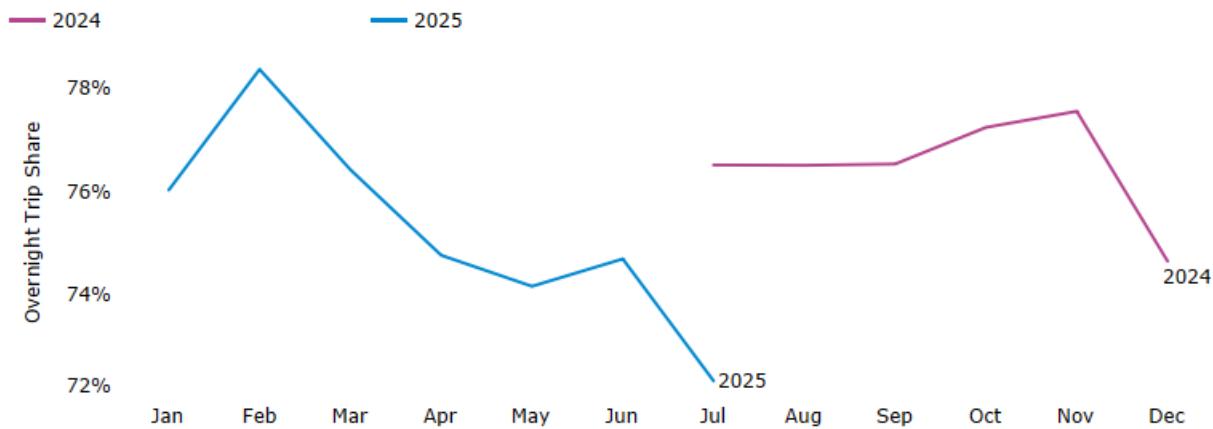


Top Origin Markets



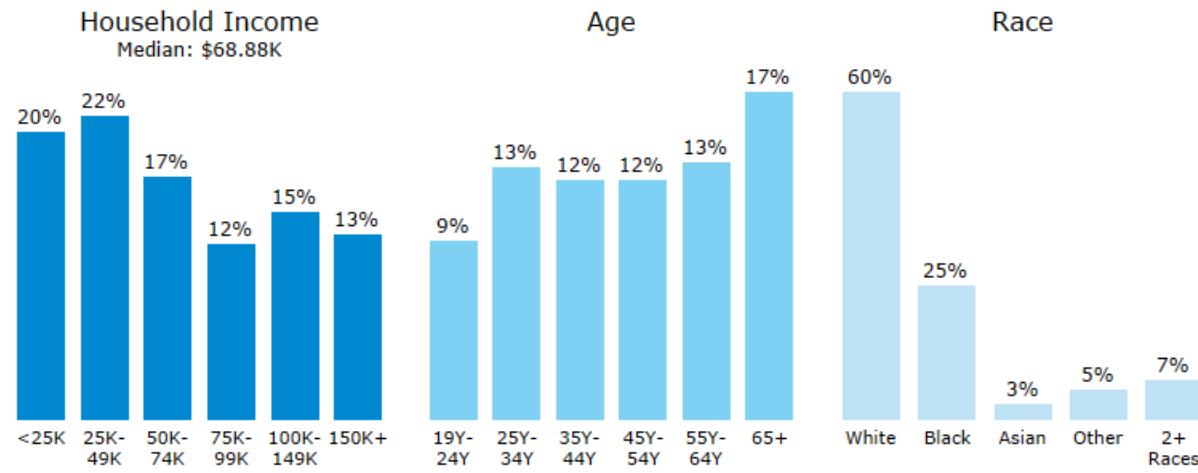
Domestic Visitor Trends & Characteristics

Overnight Trip Share by Month



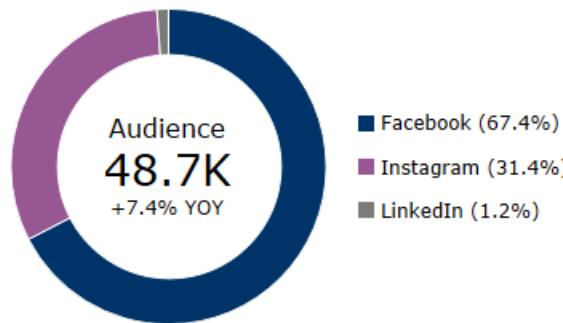
July 2025 Visitor Origin Demographics

Share of Total

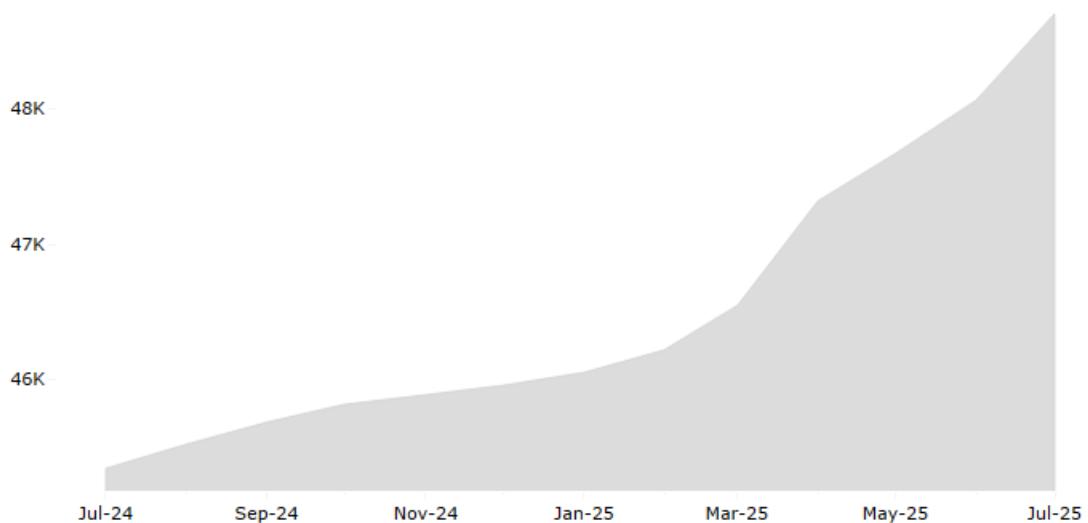


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Audience Overview



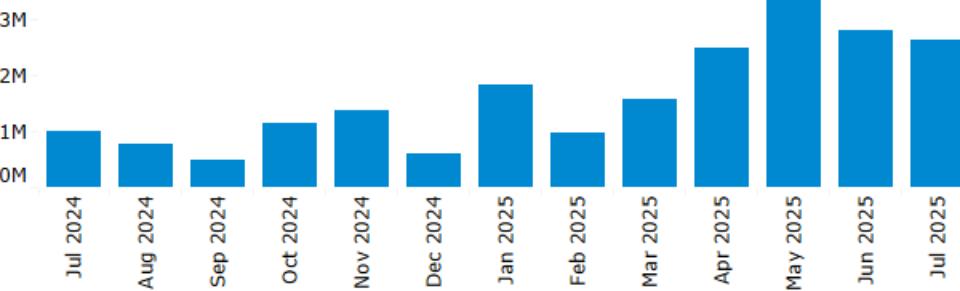
Audience by Month



Engagements & Impressions

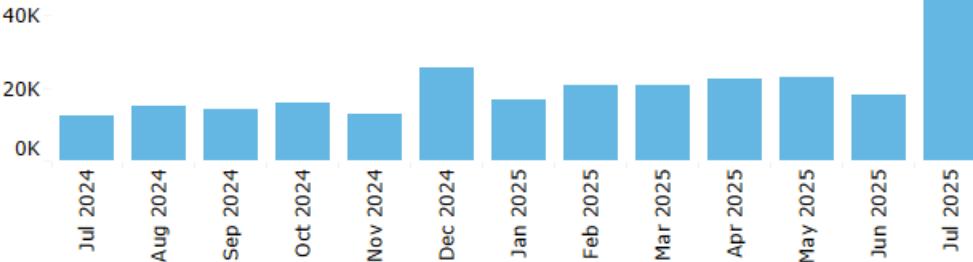
Impressions

July 2025
2.6M
+163.8% YOY



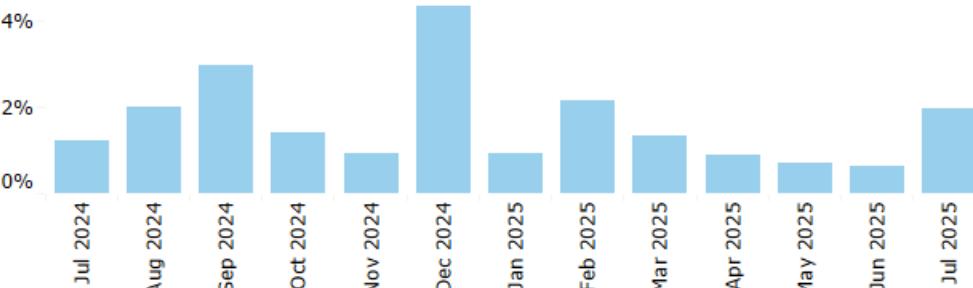
Engagements

July 2025
51.7K
+319.0% YOY



Engagement Rate

July 2025
2.0%
+0.7% pt YOY



Website Performance Summary

July 2025 | Properties: All



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Users
37.7K
+17.5% YOY



Sessions
43.4K
+17.0% YOY



Engaged Sessions
16.7K
-9.0% YOY



Engagement Rate
38.4%
-10.99% pt YOY



Page Views
63.3K
+10.0% YOY



Pages Per Session
1.46 pages
-0.09 pages YOY

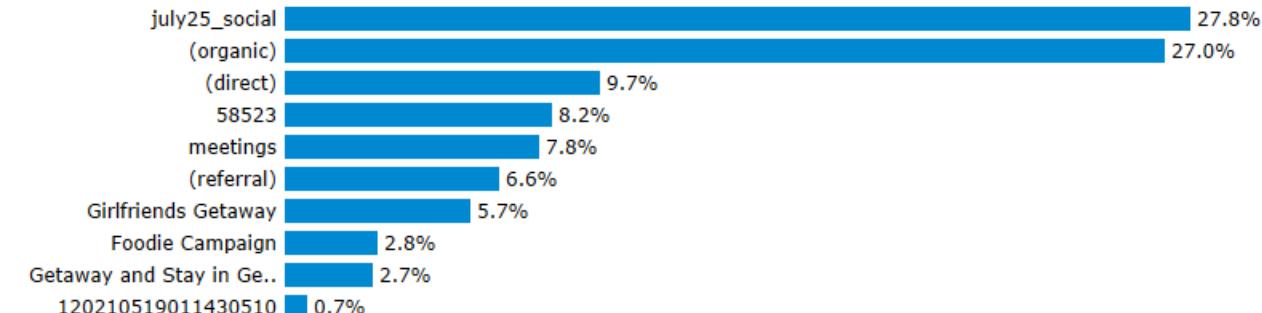


Avg. Session Duration
00:01:26
-17 sec YOY

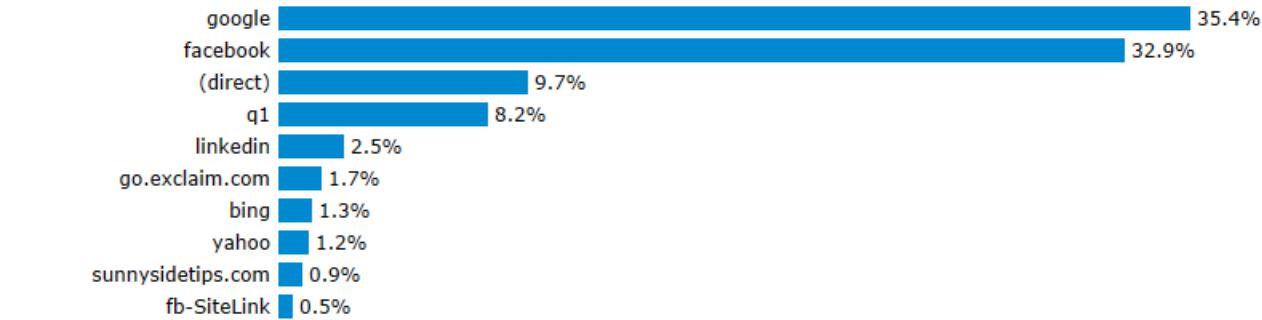


Bounce Rate
61.6%
+10.99% pt YOY

Campaigns

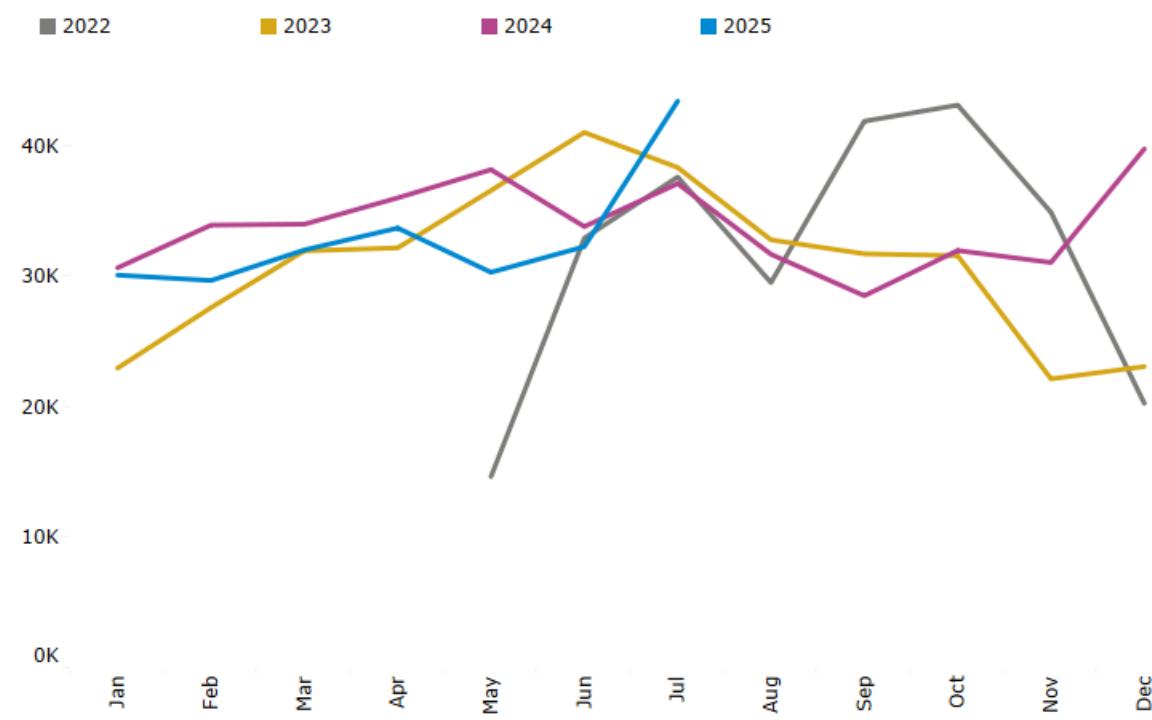


Sources



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.

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Social Media Performance by Platform

July 2025



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Facebook



Audience
32.8K
+4.1% YOY

Engagement Rate	1.9%
Impressions	2,501,569
Video Views	40,689
Engagements	46,536
Comments	1,013
Reactions	3,700
Shares	420
Post Link Clicks	14,611
Other Post Clicks	26,792

Instagram



Audience
15.3K
+10.8% YOY

Engagement Rate	3.7%
Impressions	125,154
Video Views	4,701
Engagements	4,655
Comments	211
Reactions	3,573
Saves	
Shares	760

LinkedIn



Audience
568

Engagement Rate	11.2%
Impressions	4,540
Video Views	
Engagements	507
Comments	7
Reactions	218
Shares	11
Post Link Clicks	

Facebook

Instagram

LinkedIn

3500K
3000K
2500K
2000K
1500K
1000K
500K
0K

0.05M
0.04M
0.03M
0.02M
0.01M
0.00M

Jul-24 Sep-24 Nov-24 Jan-25 Mar-25 May-25 Jul-25

Jul-24 Sep-24 Nov-24 Jan-25 Mar-25 May-25 Jul-25

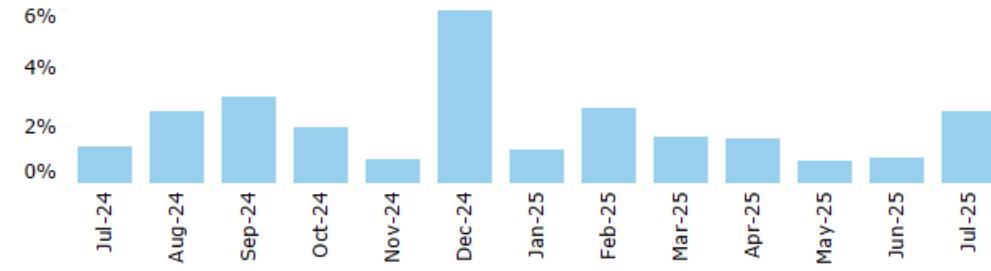
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Audience Overview

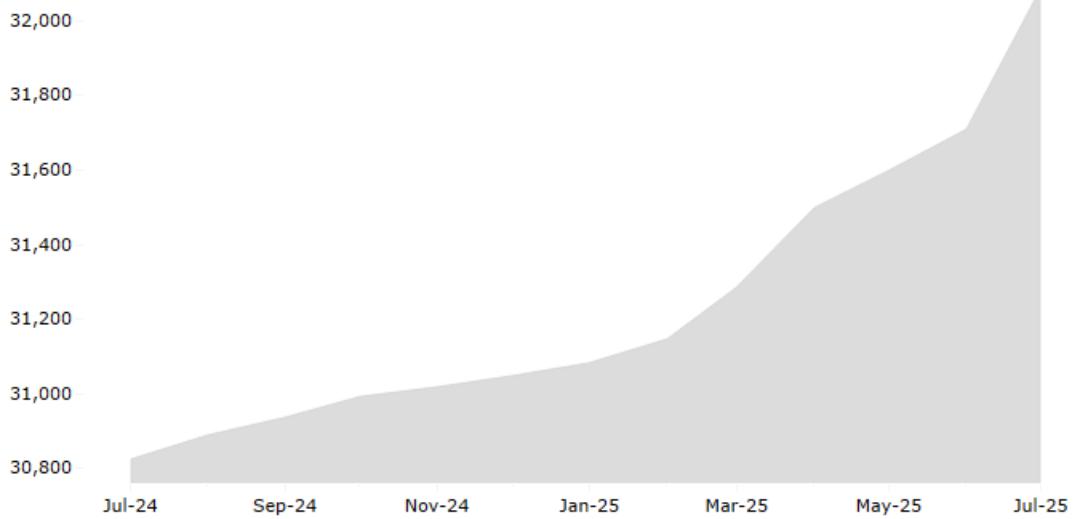
Audience
July 2025
32.1K
+4.1% YOY

Engagements & Impressions

Engagement Rate
July 2025
2.5%
+1.2% pt YOY



Audience by Month



Engagements

July 2025
61.5K
+418.7% YOY

Total Impressions
July 2025
2.5M
+165.1% YOY



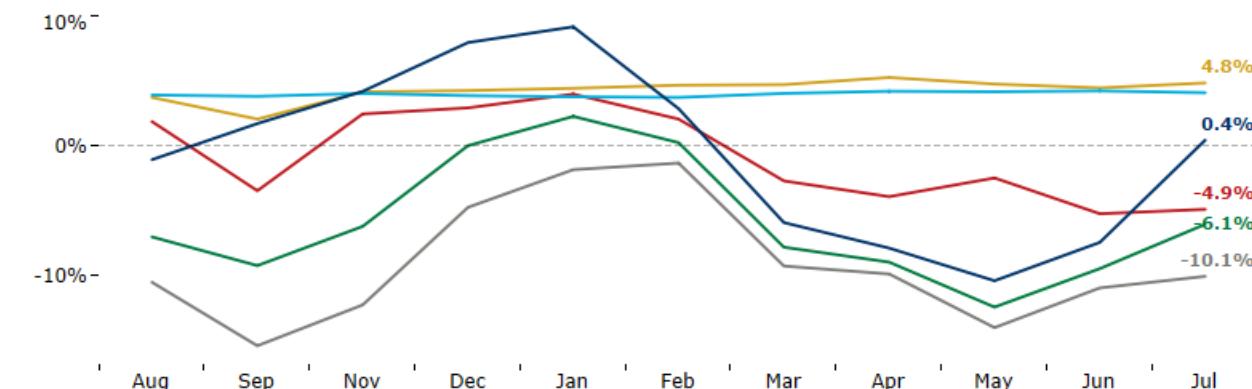
National Travel Trends



Travel Price Index

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

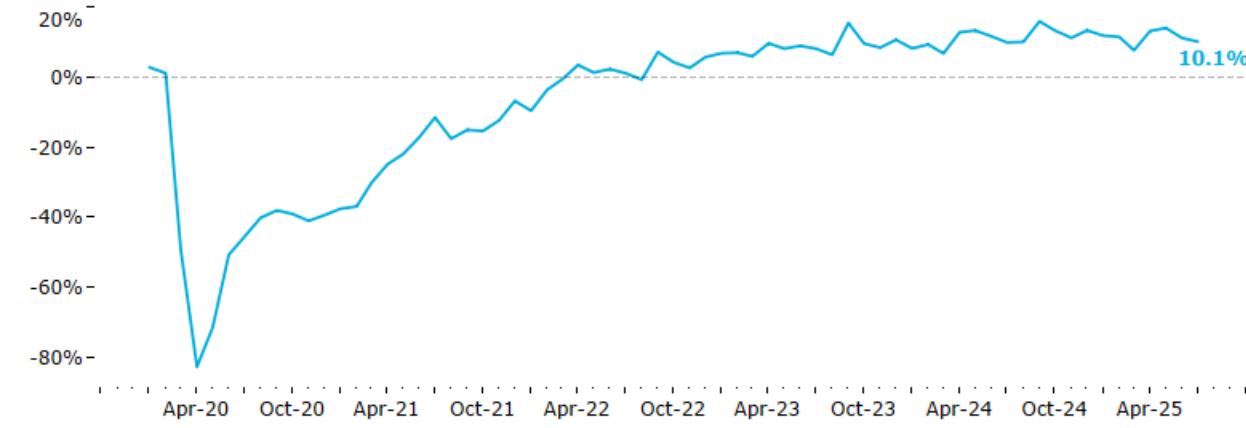
■ Airline Fares ■ F&B ■ Motor Fuel ■ Other Lodging ■ Rec. Services ■ Transportation



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

Travel Spending (% change vs 2019)

% Change vs. 2019 | U.S. total

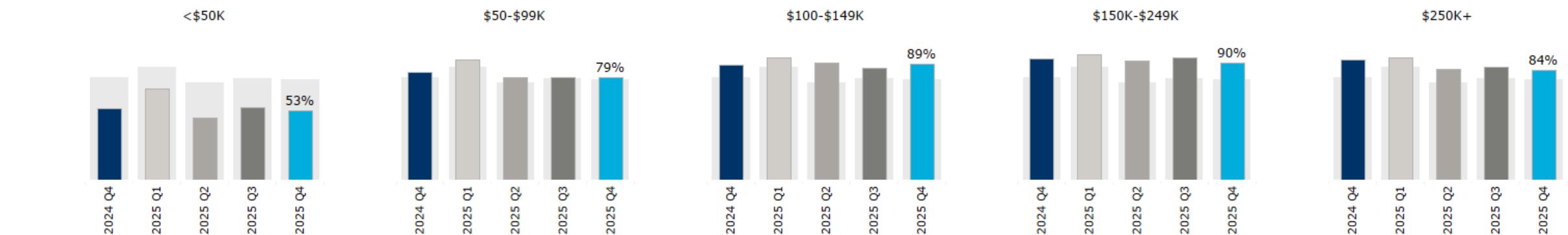


Source: Tourism Economics via U.S. Travel Recovery Tracker

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

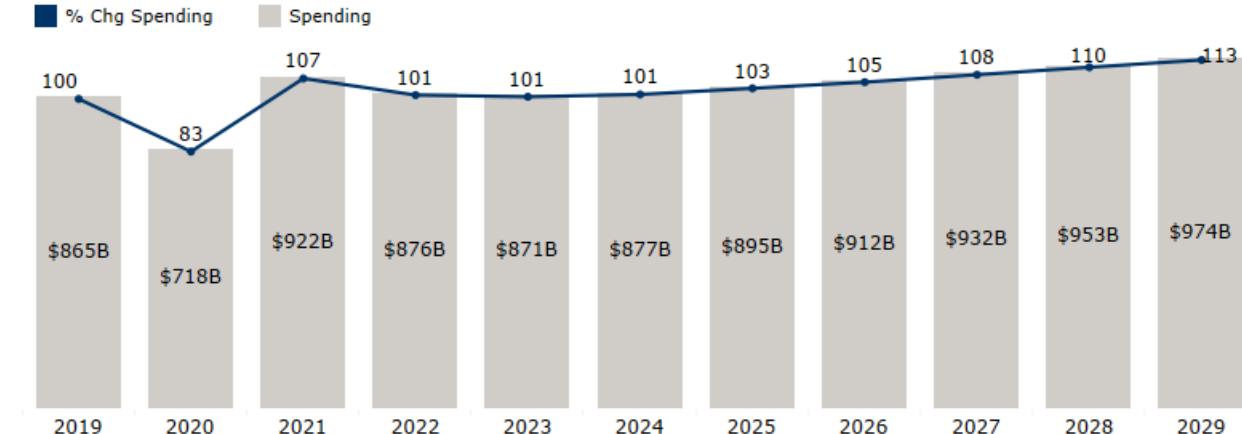
Source: MMGY Global's Portait of American Traveler

Domestic Travel Forecast

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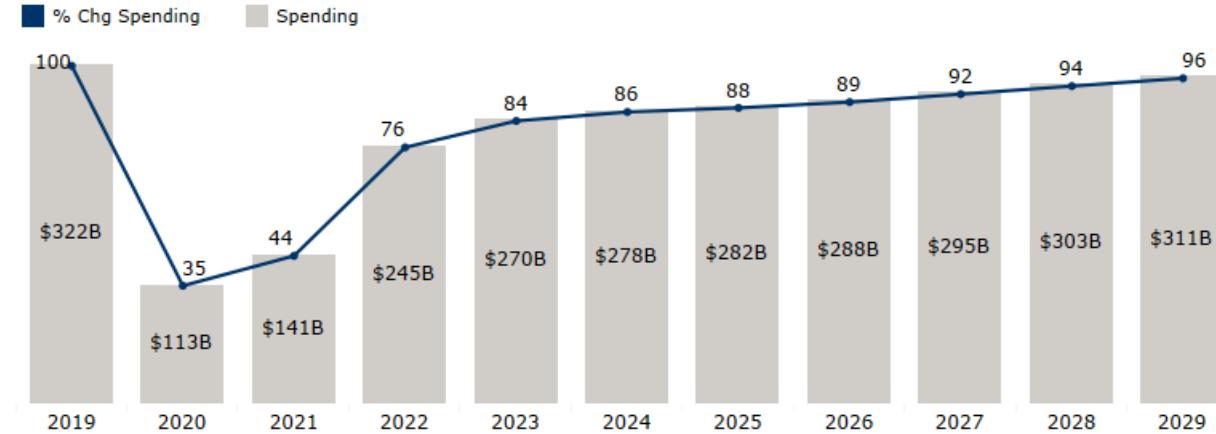
Real Domestic Leisure Travel Spending

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



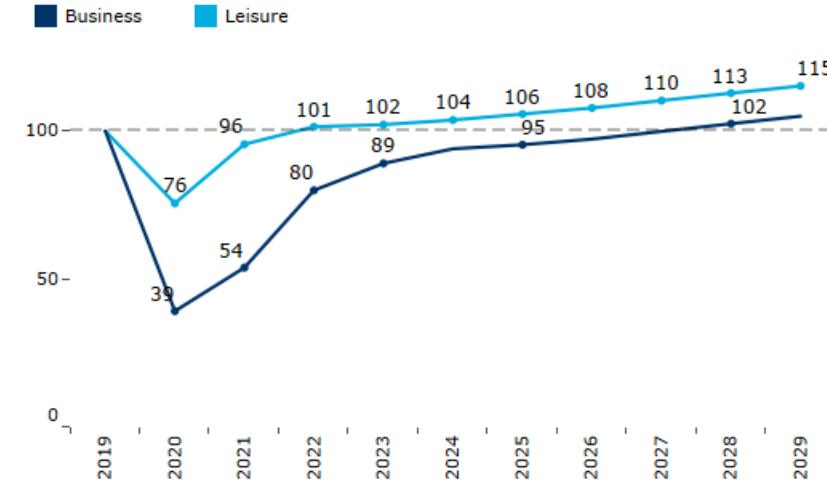
Real Domestic Business Travel Spending

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



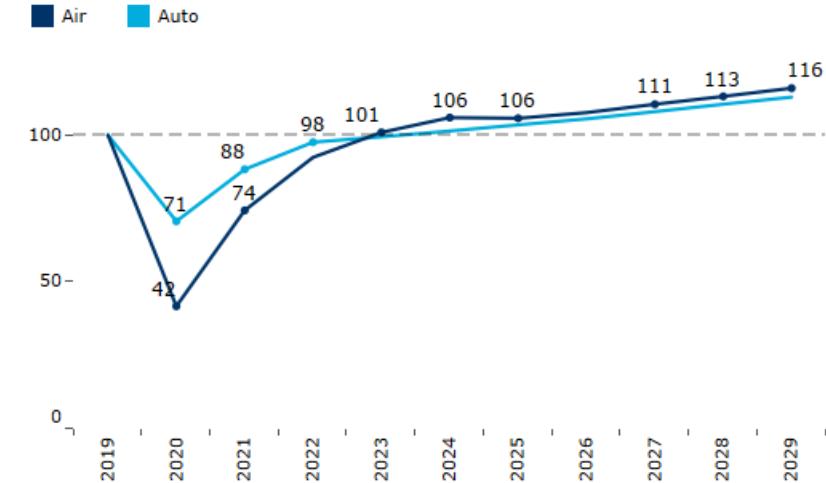
Leisure vs. Business Travel Volume

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



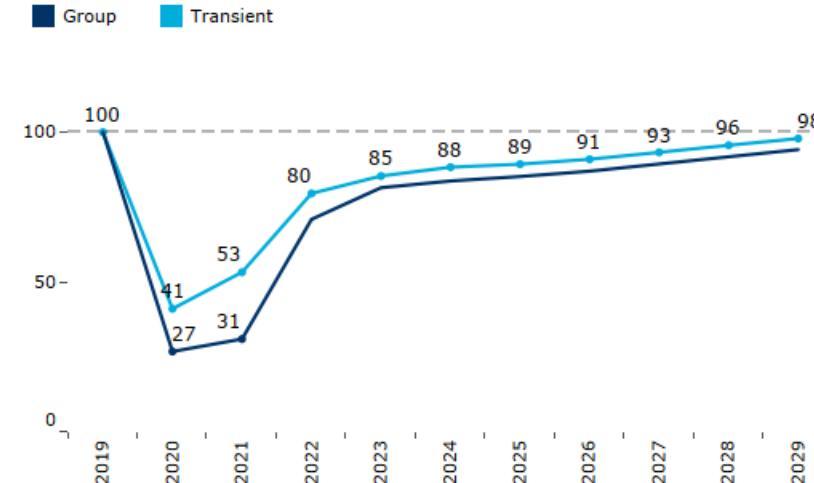
Auto vs. Air Travel Volume

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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