



# Monthly Summary Report

## July 2025



X 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.



Hotel Demand  
87.7K  
+1.9% YOY

Source: STR



Hotel ADR  
\$100.47  
-1.0% YOY

Source: STR



ATL Checkpoint Volume  
2.8M  
+1.3% YOY

Source: TSA



Social Media Audience  
48.7K  
+7.4% YOY

Source: Sprout Social



Facebook Audience  
32.1K  
+4.1% YOY

Source: Meta



Website Sessions  
43.4K  
+17.0% YOY

Source: Google Analytics



Overnight Trip Share  
72%

Source: Azira

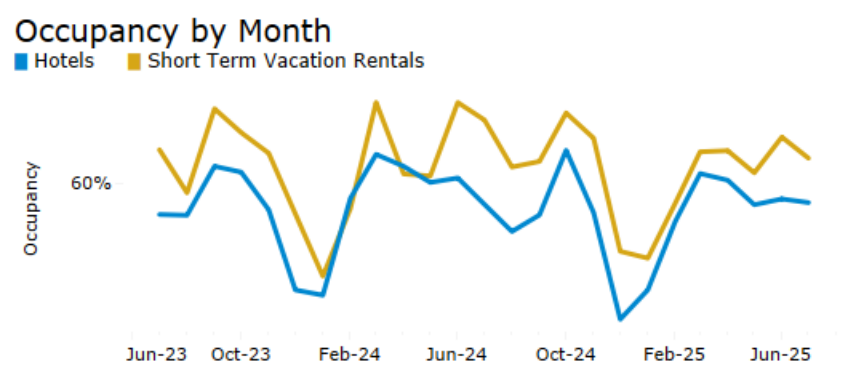


L&H Jobs  
15.6K  
+1.3% YOY

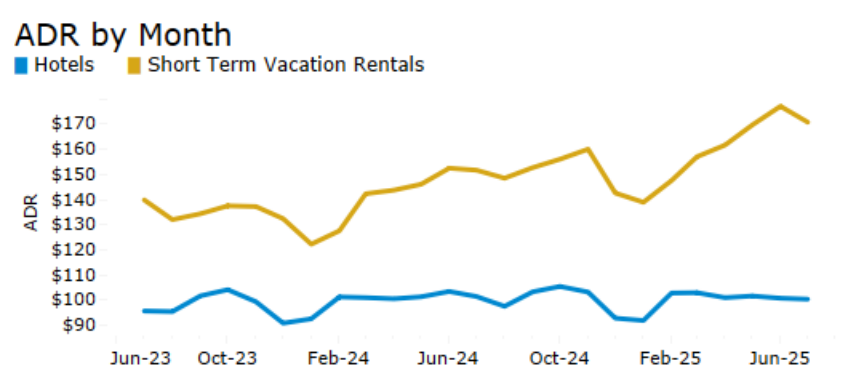
Source: Bureau of Labor Statistics



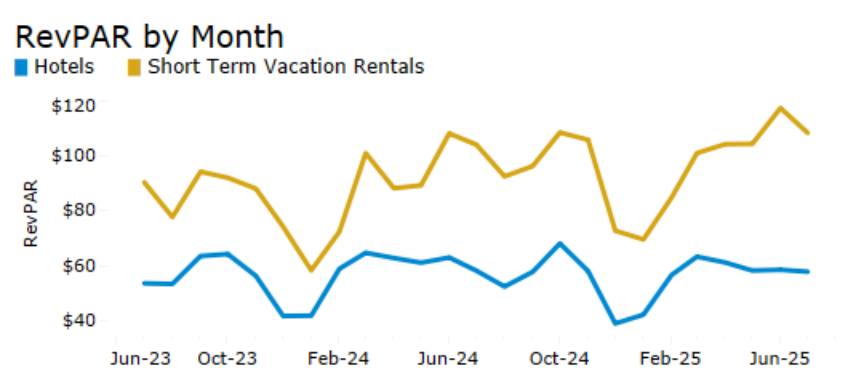
Aggregate Lodging Performance						
Sources: STR & AirDNA						
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Jul 2025	58.1%	\$109.23	\$63.51	172.3K	100.2K	\$10.9M
YOY % Change	-0.3% YOY	+1.9% YOY	+1.6% YOY	+3.6% YOY	+3.3% YOY	+5.2% YOY
Year-to-Date	57.0%	\$107.60	\$61.29	1.2M	666.1K	\$71.7M
YTD YOY %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



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



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

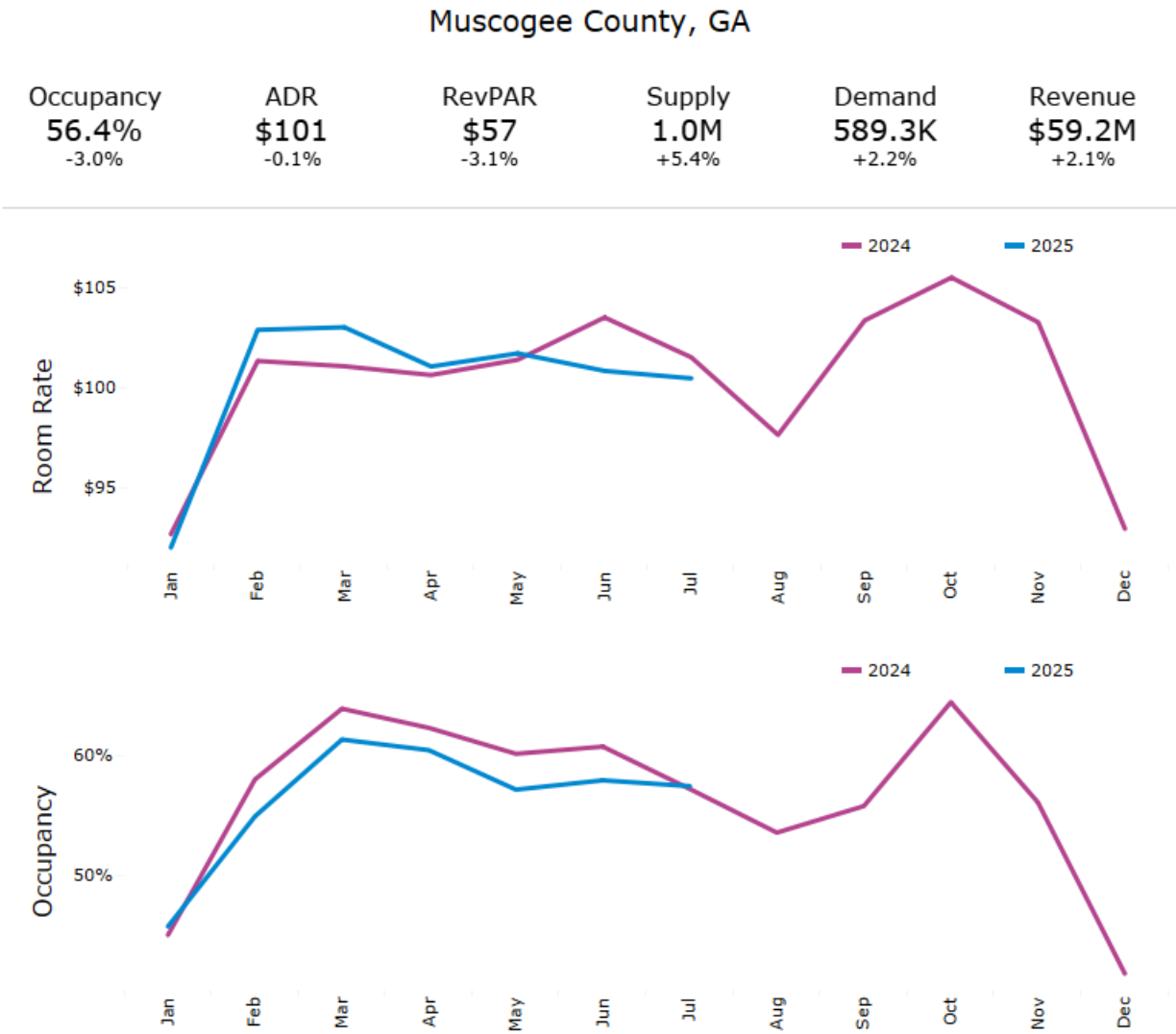


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Monthly Performance by Market

		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
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



# Hotel Competitive Performance

III

## 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%
Jun	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%
Jul	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%

## Calendar Year-to-Date Performance

### Performance by Market

Occupancy	ADR	RevPAR
Savannah, GA 70.1%	Brunswick/Kingsland, GA \$170	Savannah, GA \$106
Lowndes County, GA	LaGrange, GA+ \$152	LaGrange, GA+ \$81
Montgomery, AL 65.9%	Savannah, GA \$151	Brunswick/Kingsland, GA \$100
Gwinnett County, GA 65.6%	LaGrange, GA \$138	LaGrange, GA \$99
Cobb County, GA 65.4%	Athens/Gainesville, GA \$130	Augusta, GA \$83
LaGrange, GA+ 65.4%	Auburn-Opelika, AL \$130	Athens/Gainesville, GA \$81
LaGrange, GA 65.1%	Augusta, GA \$121	Cobb County, GA \$79
Augusta, GA 63.7%	Cobb County, GA \$113	Auburn-Opelika, AL \$78
DeKalb County, GA 61.4%	Montgomery, AL \$106	Montgomery, AL \$75
Auburn-Opelika, AL 60.1%	Lowndes County, GA \$105	Lowndes County, GA \$73
Athens/Gainesville, GA 58.9%	DeKalb County, GA \$101	DeKalb County, GA \$64
Brunswick/Kingsland, GA 58.7%	Muscogee County, GA \$100	Gwinnett County, GA \$62
Muscogee County, GA 56.4%	Russell County, AL \$96	Muscogee County, GA \$57
Albany/Southwest, GA 55.4%	Albany/Southwest, GA \$95	Albany/Southwest, GA \$53
Macon, GA 53.2%	Gwinnett County, GA \$92	Macon, GA \$49
Russell County, AL 48.5%	Macon, GA \$92	Russell County, AL \$48

### % Change vs. Previous Year

Occupancy % Change	ADR % Change	RevPAR % Change
Lowndes County, GA +19.9%	Lowndes County, GA +7.4%	Lowndes County, GA +34.5%
Russell County, AL +7.0%	Augusta, GA +4.8%	Augusta, GA +5.7%
Augusta, GA +2.2%	Cobb County, GA +4.5%	Auburn-Opelika, AL +5.0%
Montgomery, AL +2.0%	Albany/Southwest, GA +4.1%	Russell County, AL +4.8%
Macon, GA +1.8%	Athens/Gainesville, GA +3.8%	Albany/Southwest, GA +4.2%
Auburn-Opelika, AL +0.7%	Auburn-Opelika, AL +1.9%	Montgomery, AL +3.7%
Brunswick/Kingsland, GA +0.3%	Montgomery, AL +0.7%	Cobb County, GA +2.7%
Albany/Southwest, GA -1.1%	Gwinnett County, GA +0.7%	Macon, GA +0.0%
Cobb County, GA -1.8%	Macon, GA -0.1%	Brunswick/Kingsland, GA -0.4%
DeKalb County, GA -2.0%	Muscogee County, GA -0.7%	Gwinnett County, GA -0.4%
Gwinnett County, GA -3.0%	Brunswick/Kingsland, GA -0.8%	Athens/Gainesville, GA -2.6%
Muscogee County, GA -3.6%	DeKalb County, GA -1.4%	DeKalb County, GA -3.1%
Savannah, GA -4.1%	LaGrange, GA+ -1.5%	Muscogee County, GA -5.1%
LaGrange, GA+ -4.3%	Savannah, GA -1.7%	Savannah, GA -5.5%
Athens/Gainesville, GA -4.3%	LaGrange, GA -5.5%	LaGrange, GA+ -6.0%
LaGrange, GA	Russell County, AL	LaGrange, GA

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Monthly Performance by Market

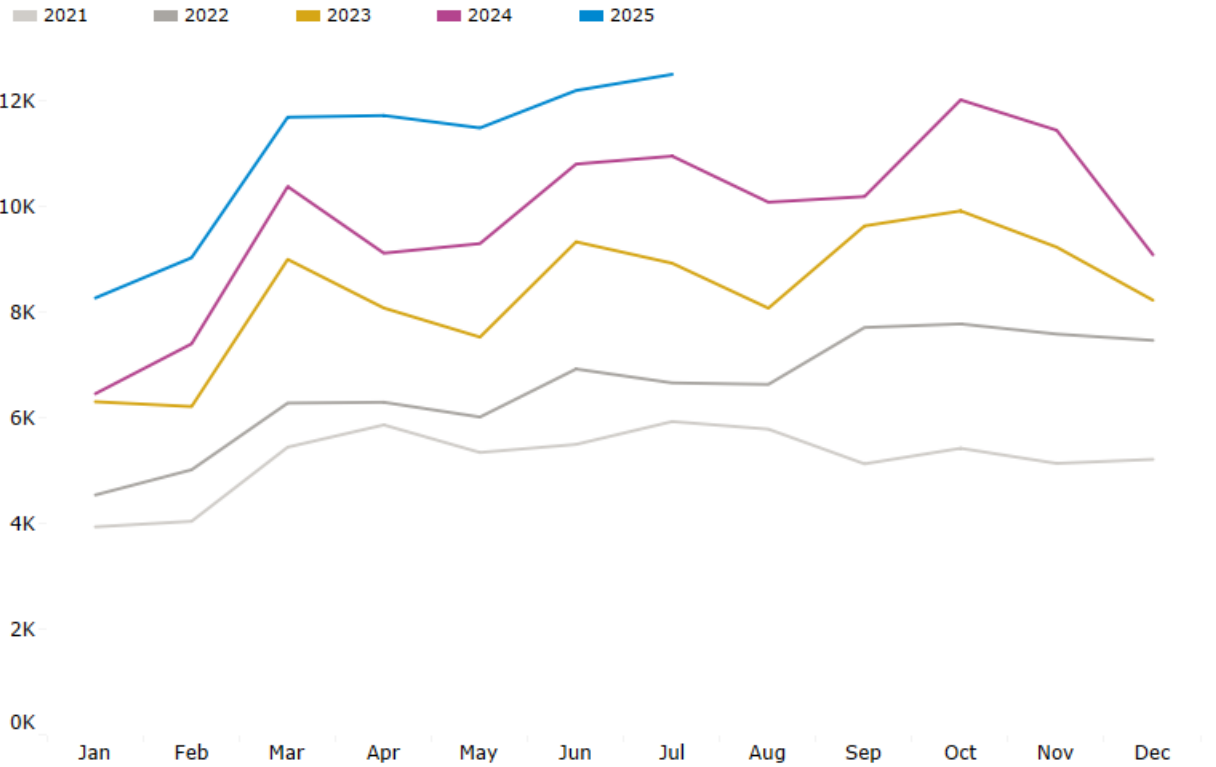
		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
May	Columbus	61.4%	+0.7%	\$170	+16.1%	\$104	+16.9%
Jun	Columbus	66.2%	-6.5%	\$177	+16.1%	\$117	+8.5%
Jul	Columbus	63.4%	-7.5%	\$171	+12.6%	\$108	+4.1%

Calendar Year-to-Date Performance

Columbus All Properties					
Occupancy	ADR	RevPAR	Supply	Demand	Revenue
61.3%	\$162	\$99	125.3K	76.8K	\$12.4M
-2.4%	+13.5%	+10.8%	+22.3%	+19.4%	+35.6%

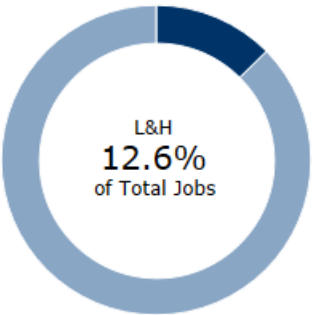
Short Term Rental Demand by Month

Last Five Calendar Years



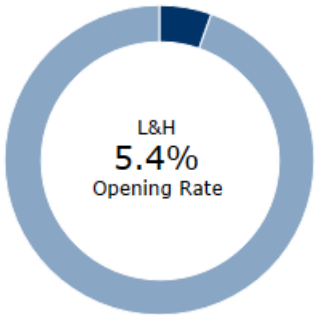
Total Leisure & Hospitality Jobs

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

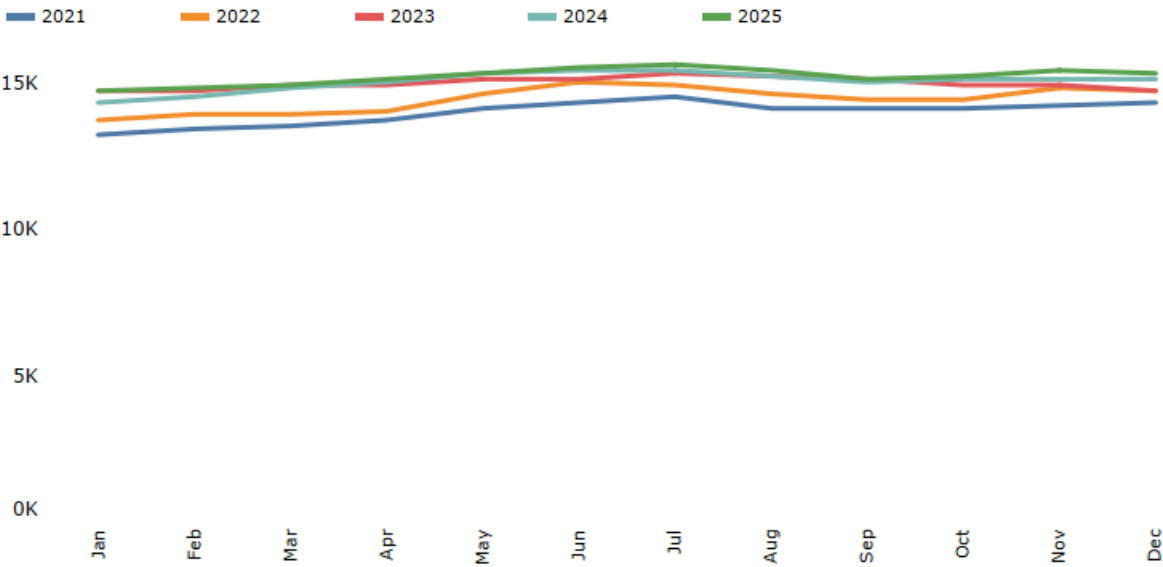


Leisure & Hospitality Job Openings

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



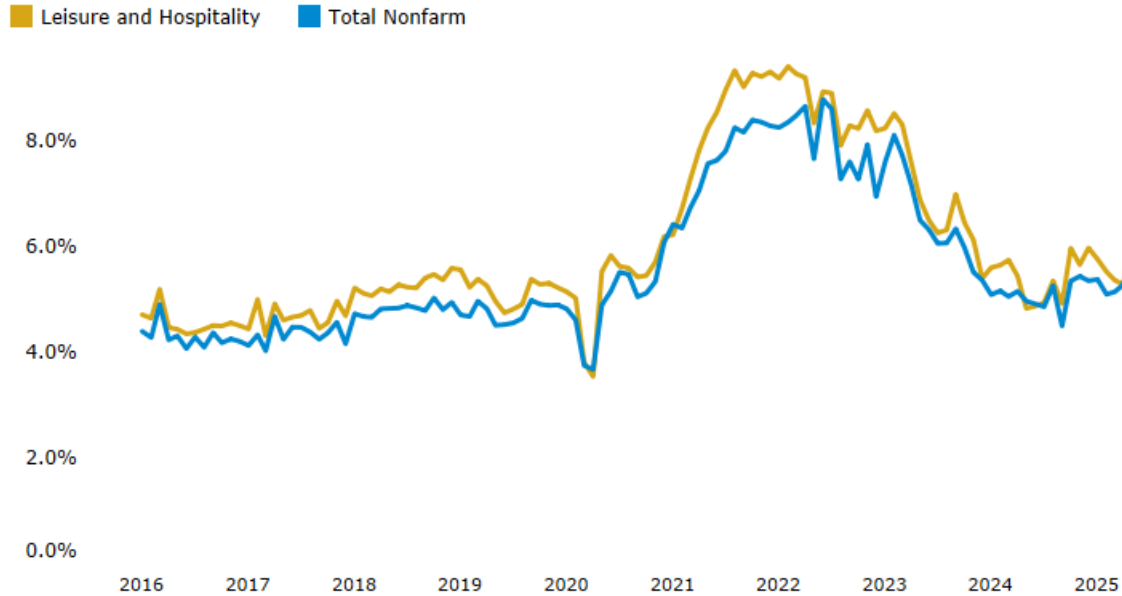
Employment Recovery  
Leisure & Hospitality Jobs (Thousands)



Source: Bureau of Labor Statistics

Job Opening Rate

Share of total available jobs that are not filled



Source: Tourism Economics



# Airport TSA Checkpoint Volume & Visitor Origins

ATL - Hartsfield - Jackson Atlanta International



## Monthly TSA Checkpoint Volume

July 2025 Volume

2.8M

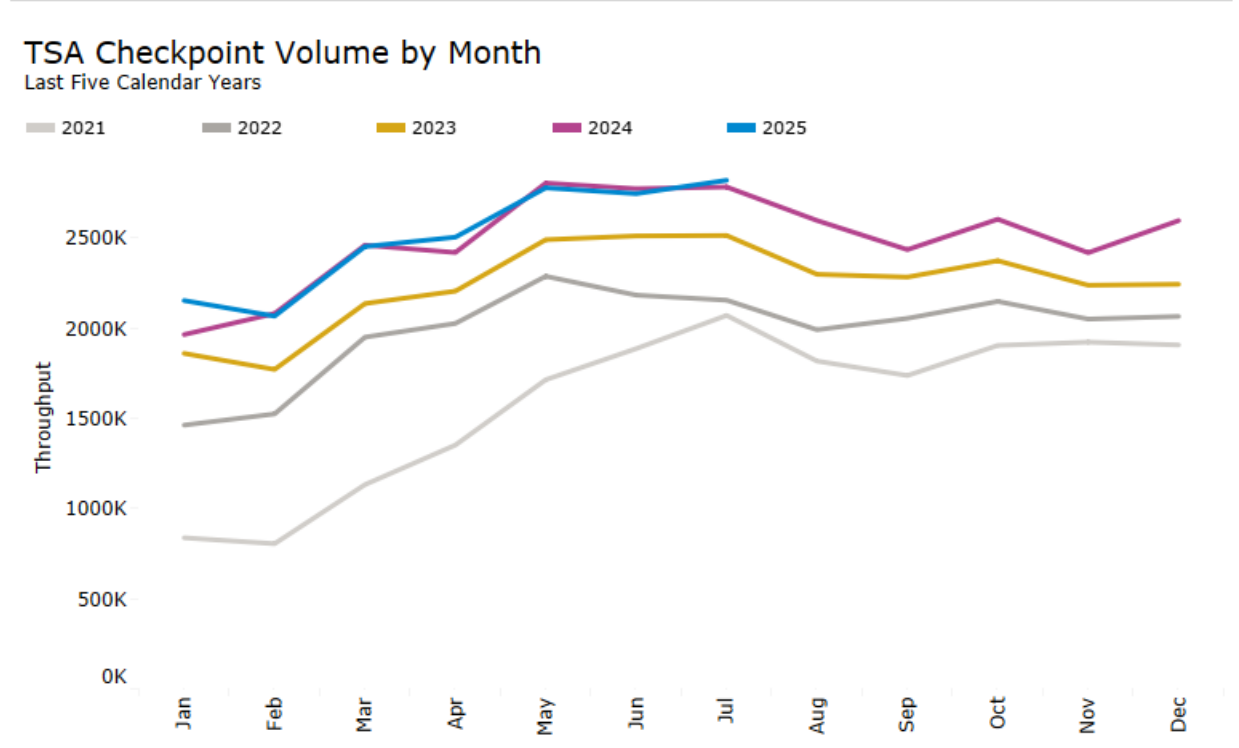
+1.3% YOY

## Year-to-Date TSA Checkpoint Volume & Visitor Origins

Jan - Jul 2025 Volume

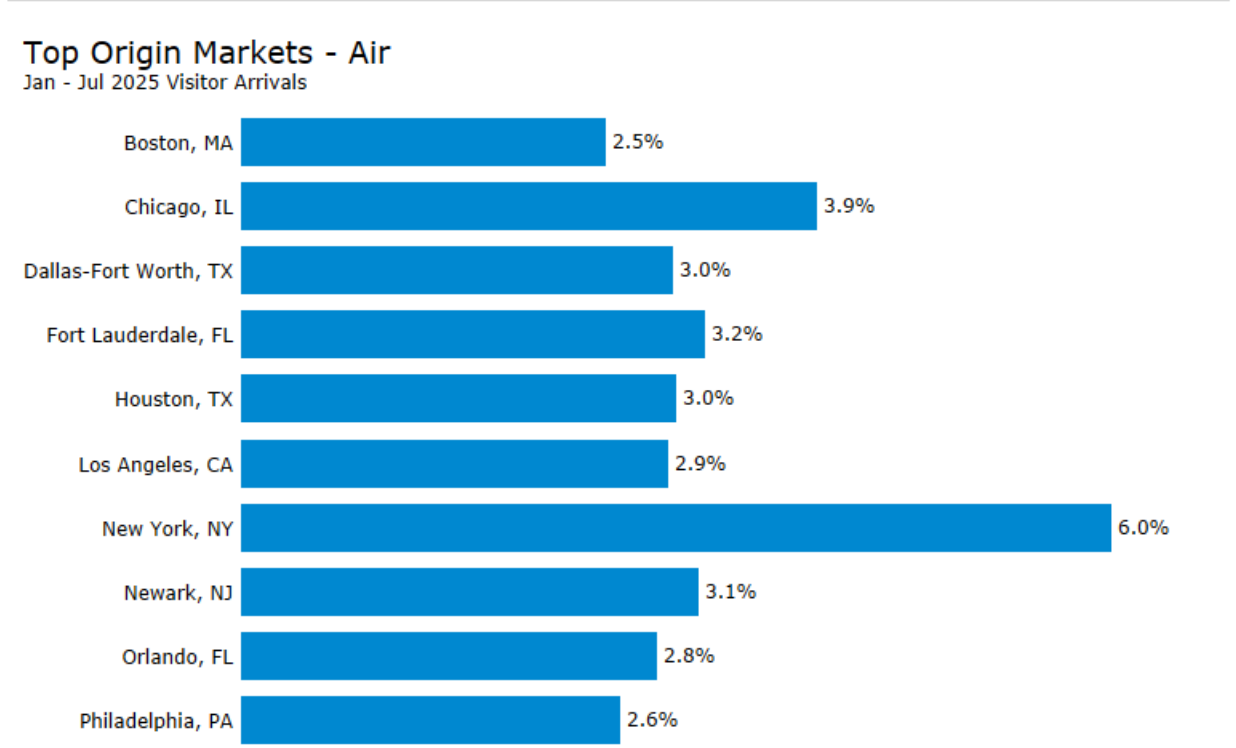
17.5M

+1.4% YOY



Source: Transportation Security Administration

Source: Transportation Security Administration

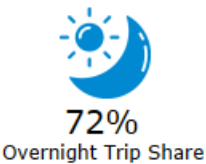


Source: OAG



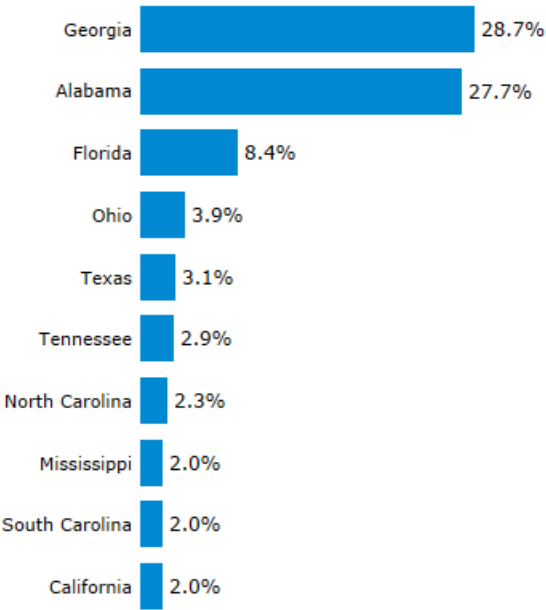


July 2025 Domestic Visits

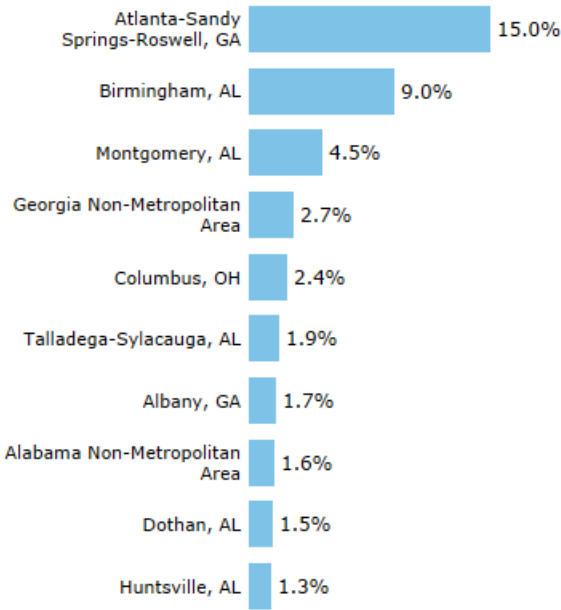


Top Origin Markets

States

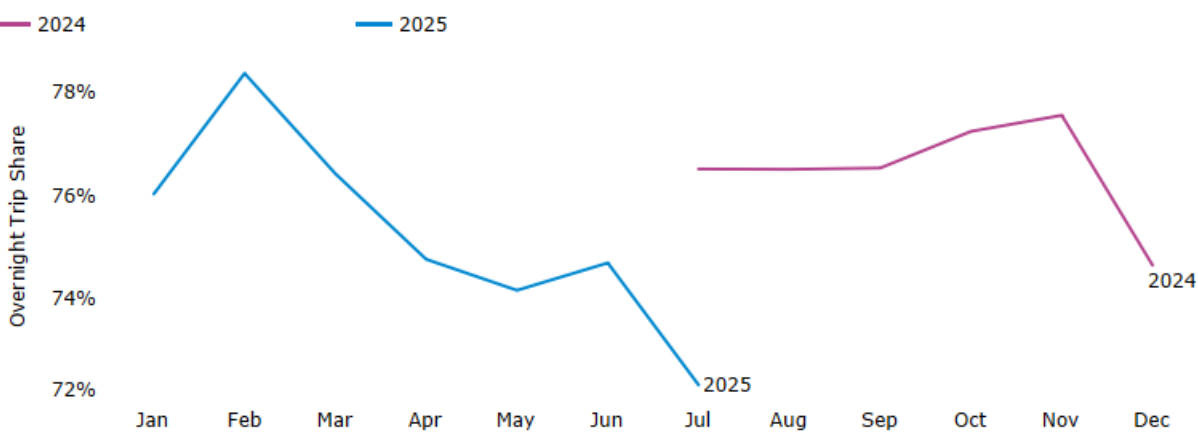


MSA

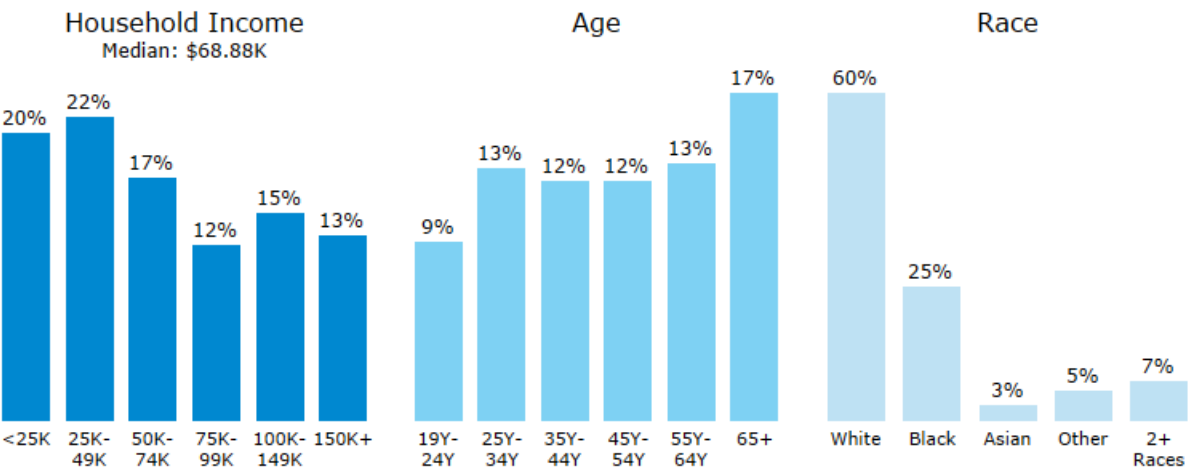


Domestic Visitor Trends & Characteristics

Overnight Trip Share by Month

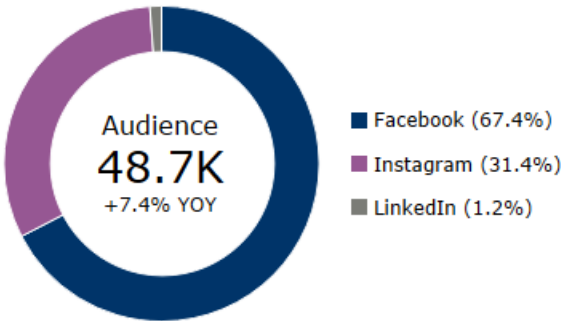


July 2025 Visitor Origin Demographics  
Share of Total

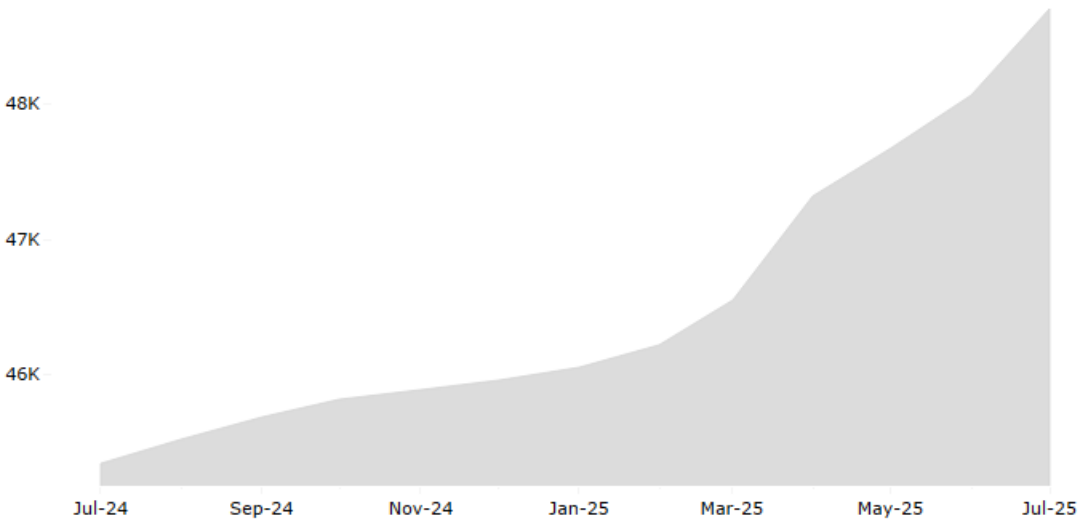




Audience Overview



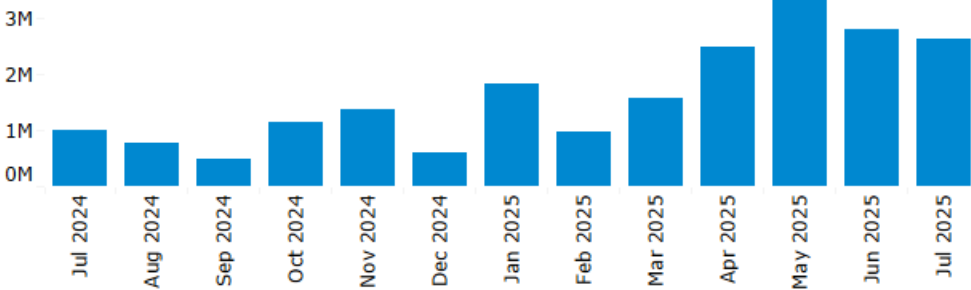
Audience by Month



Engagements & Impressions

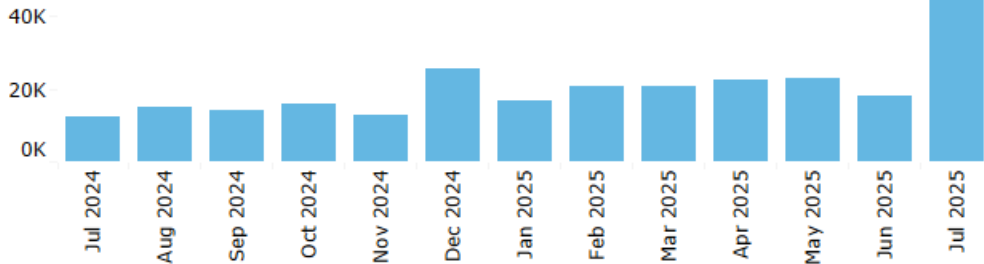
Impressions

July 2025  
**2.6M**  
+163.8% YOY



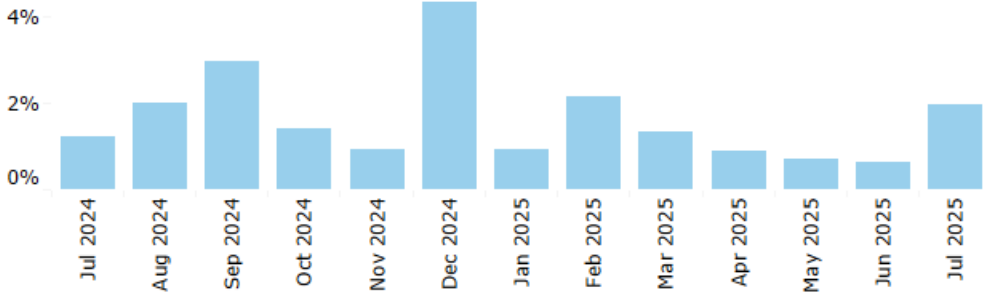
Engagements

July 2025  
**51.7K**  
+319.0% YOY



Engagement Rate

July 2025  
**2.0%**  
+0.7% pt YOY



# Website Performance Summary

July 2025 | Properties: All



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

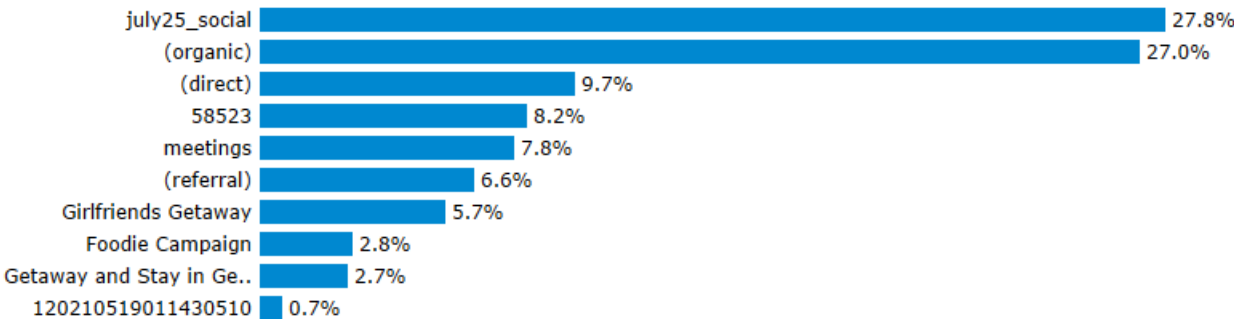


Avg. Session Duration  
**00:01:26**  
-17 sec YOY

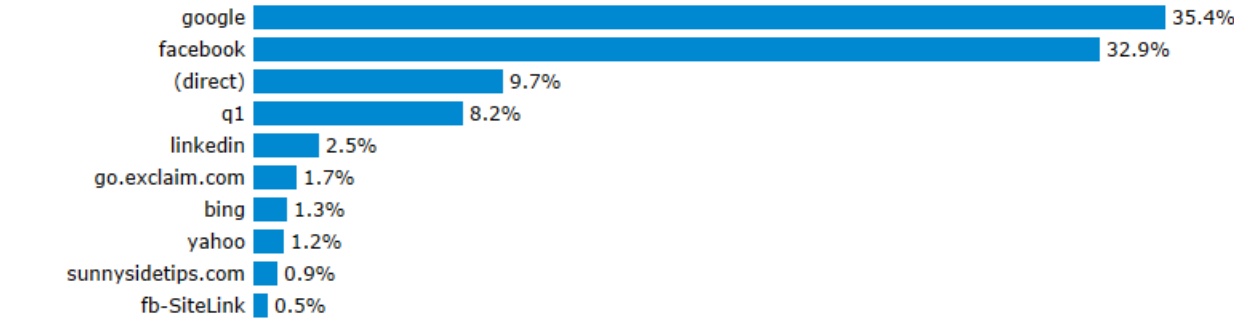


Bounce Rate  
**61.6%**  
+10.99% pt YOY

## Campaigns

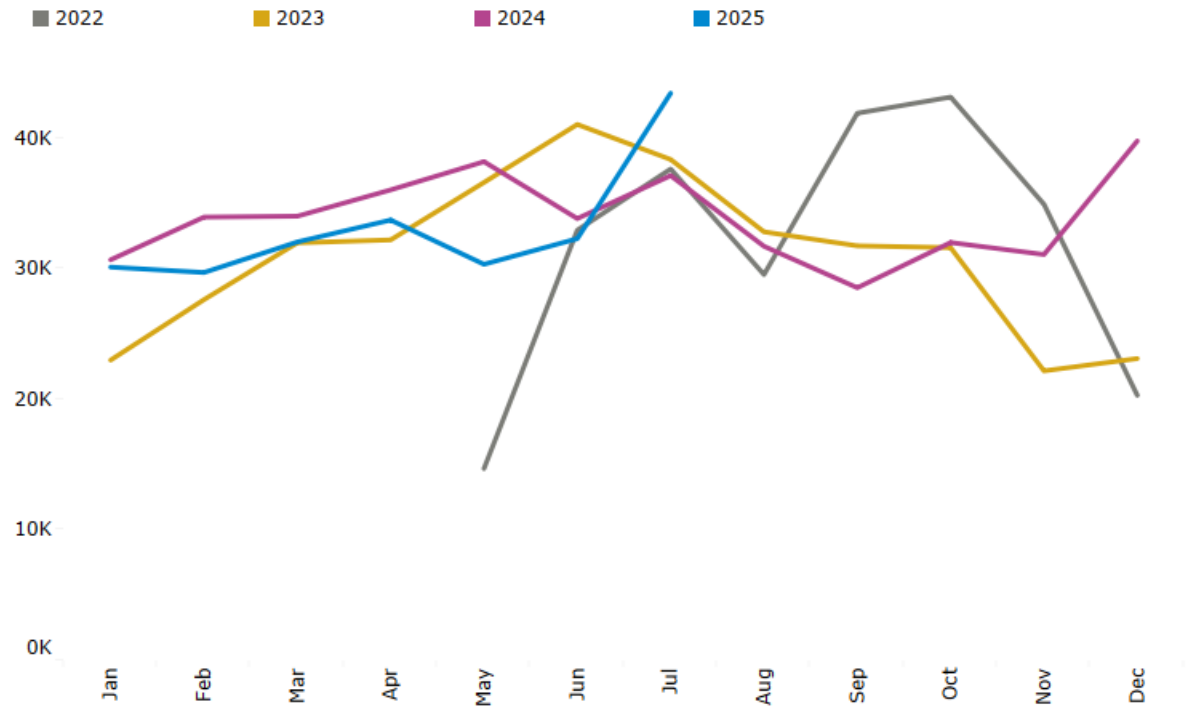


## Sources



## 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.

# Social Media Performance by Platform

July 2025



## 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

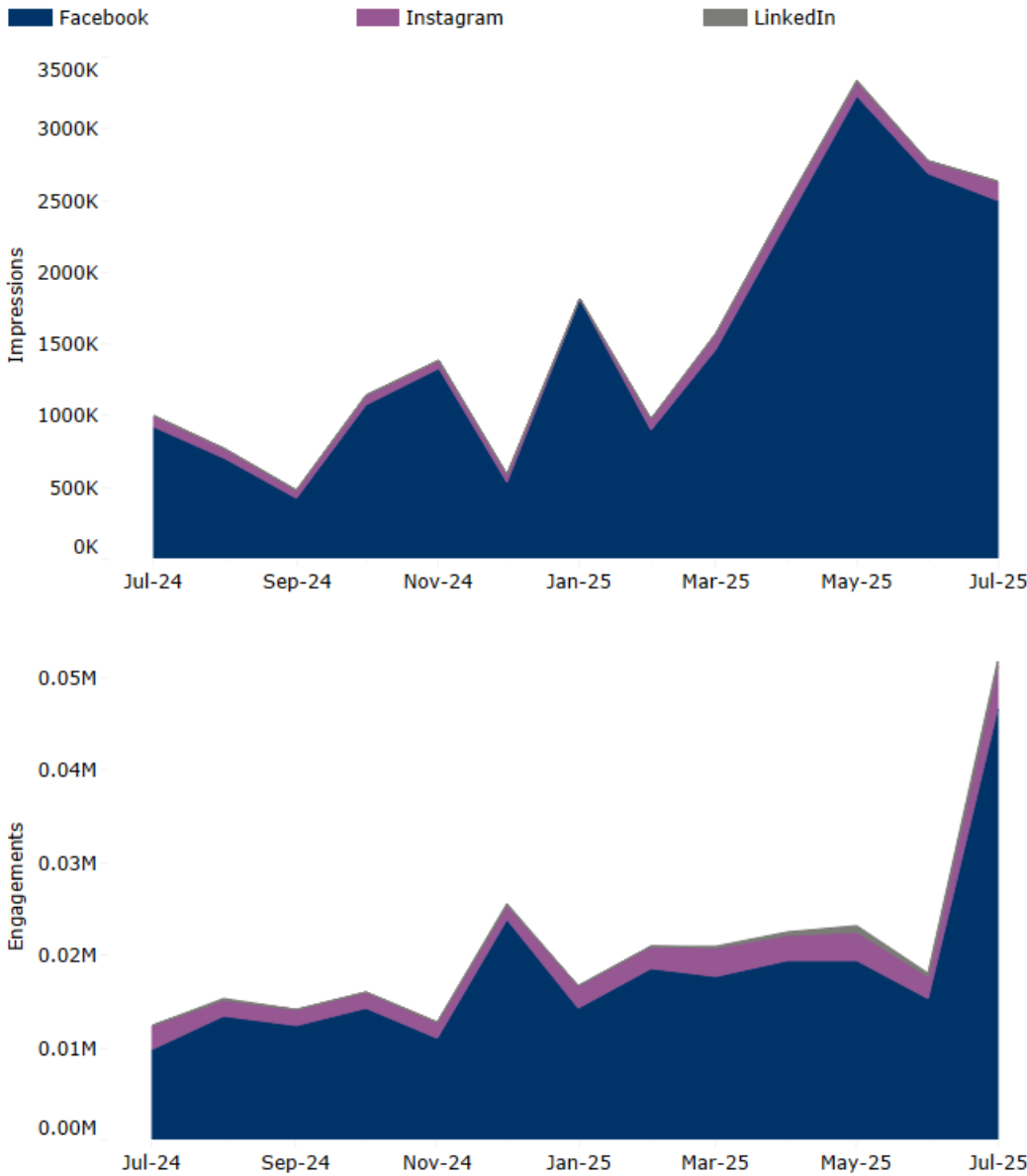
Engagement Rate	3.7%
Impressions	125,154
Video Views	4,701
Engagements	4,655
Comments	211
Reactions	3,573
Saves	
Shares	760

## LinkedIn



Audience  
568

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



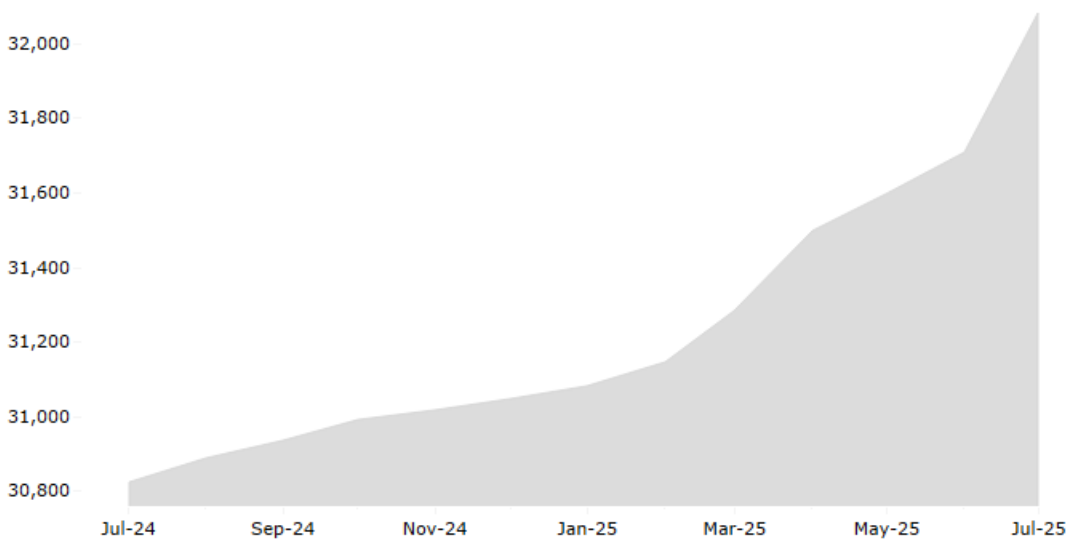




Audience Overview

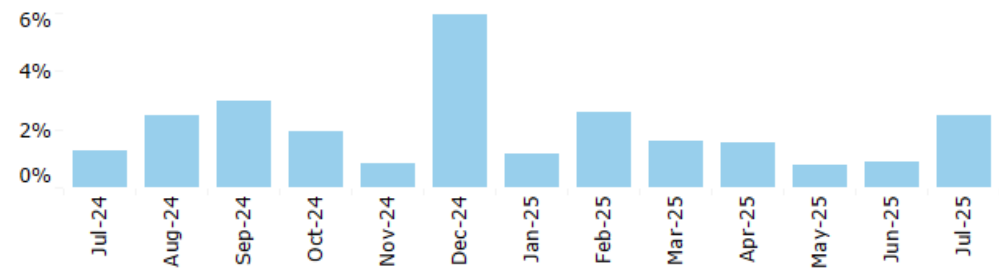
Audience  
July 2025  
**32.1K**  
+4.1% YOY

Audience by Month

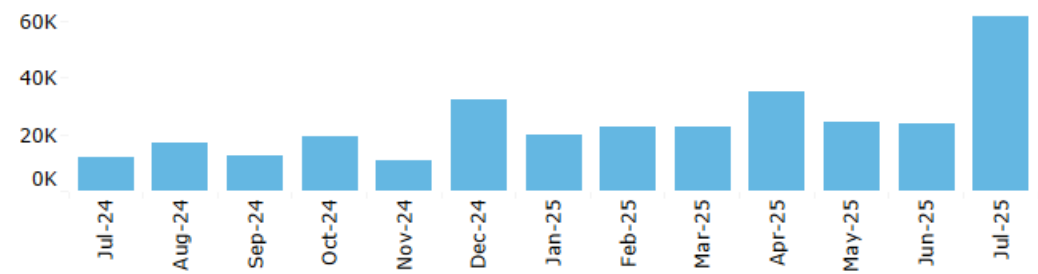


Engagements & Impressions

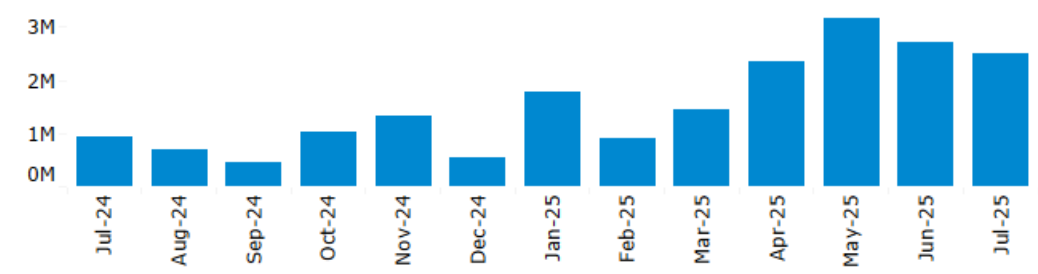
Engagement  
Rate  
July 2025  
**2.5%**  
+1.2% pt YOY



Engagements  
July 2025  
**61.5K**  
+418.7% YOY

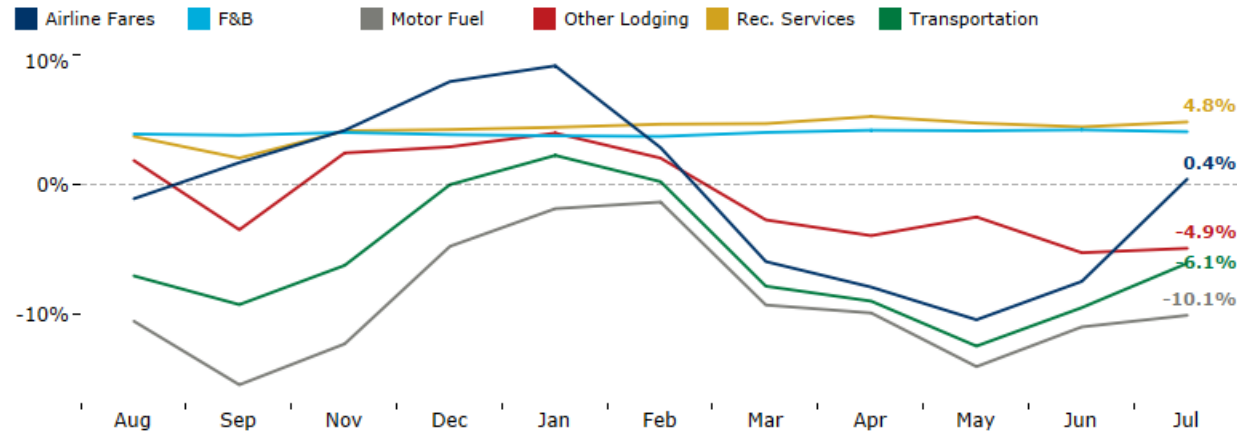


Total  
Impressions  
July 2025  
**2.5M**  
+165.1% YOY



Travel Price Index

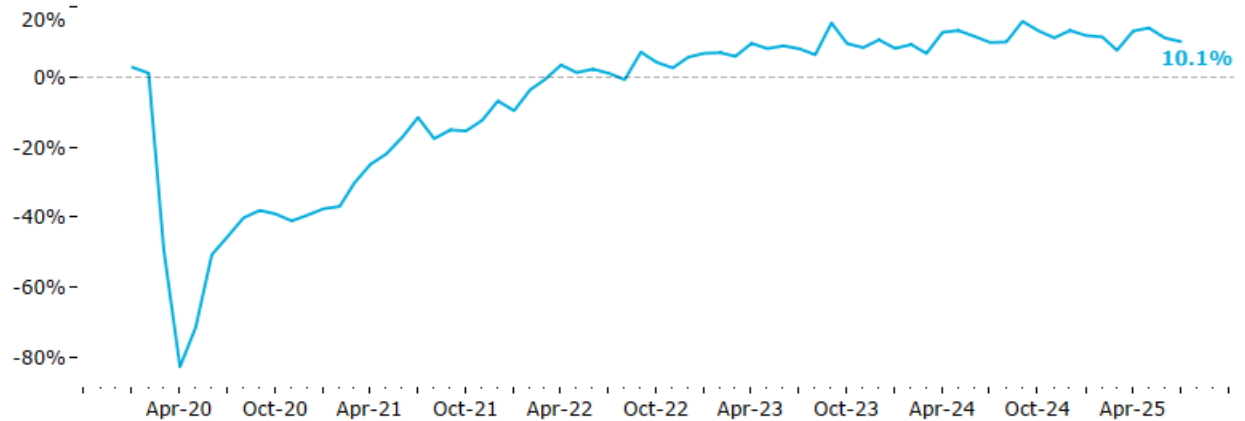
% Change Relative to Same Month in Previous Year | Last 12 Months



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

Travel Spending (% change vs 2019)

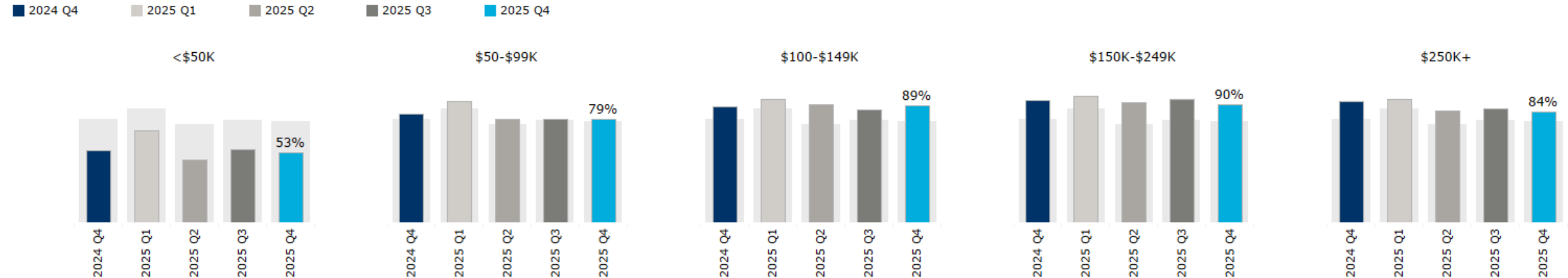
% Change vs. 2019 | U.S. total



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)

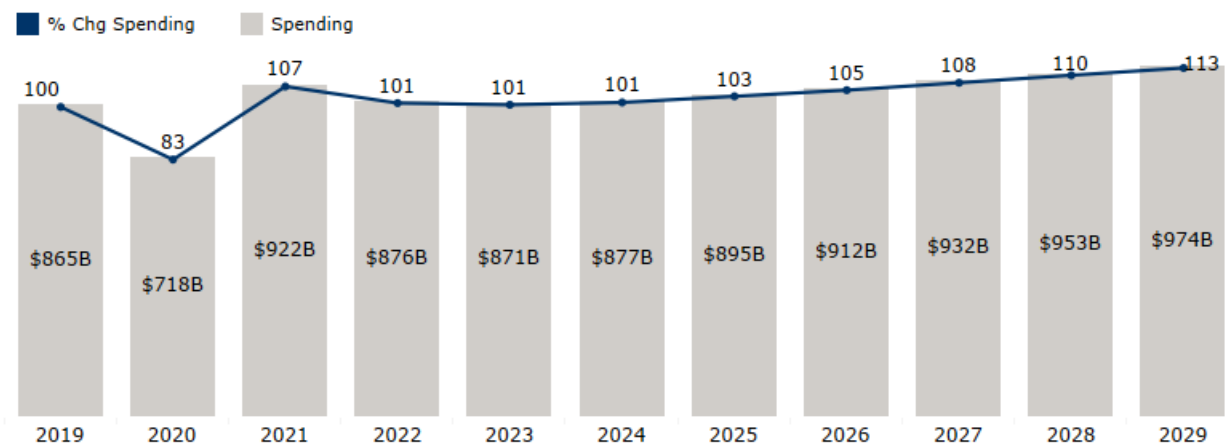


Note: Light gray bars represent the average for all survey respondents  
Source: MMGY Global's Portrait of American Travelers

# Domestic Travel Forecast

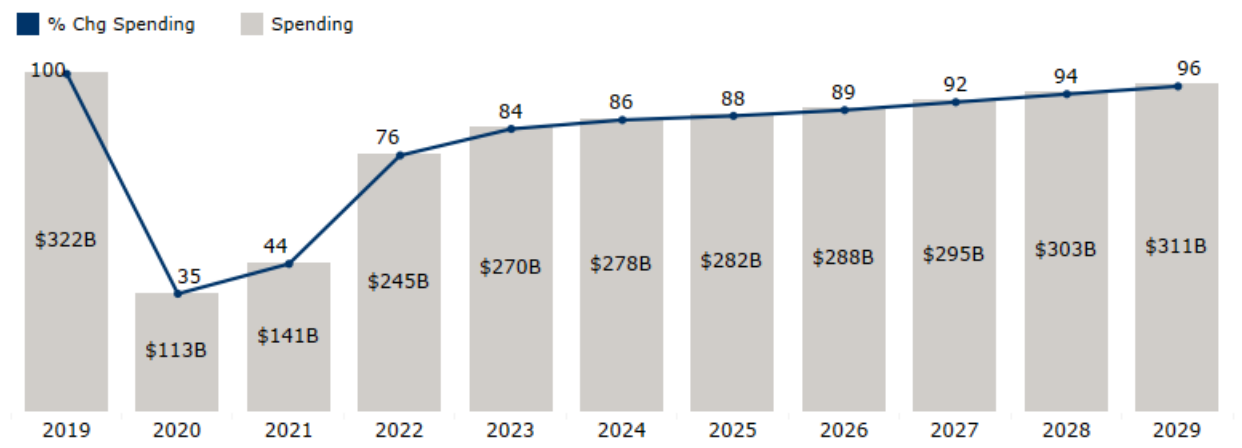
## Real Domestic Leisure Travel Spending

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



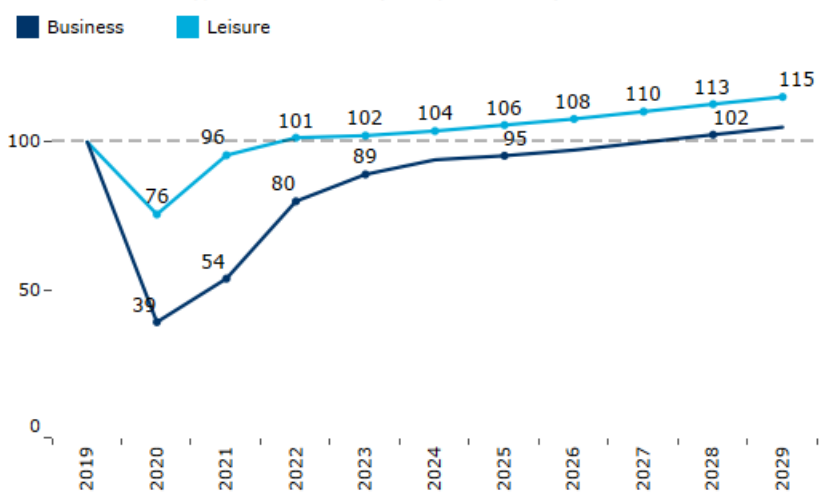
## Real Domestic Business Travel Spending

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



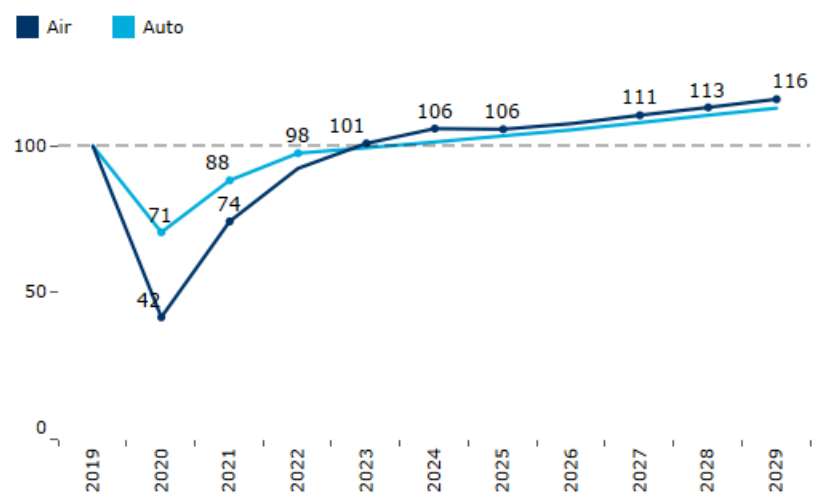
## Leisure vs. Business Travel Volume

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



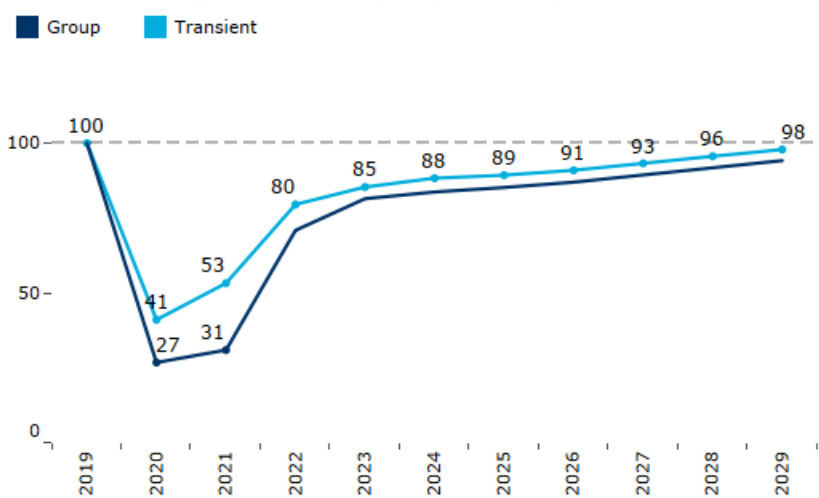
## Auto vs. Air Travel Volume

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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