



# Monthly Summary Report

## August 2025



# Executive Summary

August 2025



X Month  
August 2025

## Highlights

Demand for Muscogee County hotels was +4% YOY more than last year. With slightly less rooms to fill at -0.1% YOY, occupancy gained +4.1% YOY to 55.8%. Short term rental demand increased 31% YOY but +31.2% YOY was added to supply causing a -0.2% YOY drop in occupancy to 57.3%.

ADR for hotels was -1.6% YOY lower than last year at \$96 but was offset by the increase in demand generating a +2.3% YOY increase in revenue to \$8.2M for the month. In contrast, short term rental ADR was +17.3% YOY higher at \$192 and combined with the increase in demand resulted in 53.7% YOY more revenue at \$1.9M.

Marketing metrics did well in August illustrated by 11.8% YOY more website sessions at 35.4K, a +7.6% YOY increase in the social media audience at 49K, and a 1% YOY gain in the Facebook audience at 29.9K.

US hotel performance continued to soften in August, as occupancy declined 1.3% YOY driven by a 0.9% increase in supply. ADR remained level as RevPAR declined 1.0% YOY. The market remains split as luxury hotels saw a 4.0% YOY increase in demand, while remaining property classes experienced low to no growth nationally.

The U.S. economy added 22,000 jobs in August, bringing the three-month average to 29,000, while unemployment rose to 4.3% as gains in the health care sector were offset by losses in federal government and energy sectors. U.S. 12-month inflation increased to 2.9% in August.



Hotel Demand  
85.4K  
+4.3% YOY

Source: STR



Hotel ADR  
\$95.96  
-1.7% YOY

Source: STR



ATL Checkpoint Volume  
2.6M  
-0.8% YOY

Source: TSA



Social Media Audience  
49.0K  
+7.6% YOY

Source: Sprout Social



Facebook Audience  
32.2K  
+4.2% YOY

Source: Meta



Website Sessions  
35.4K  
+11.8% YOY

Source: Google Analytics



Overnight Trip Share  
76%

Source: Azira

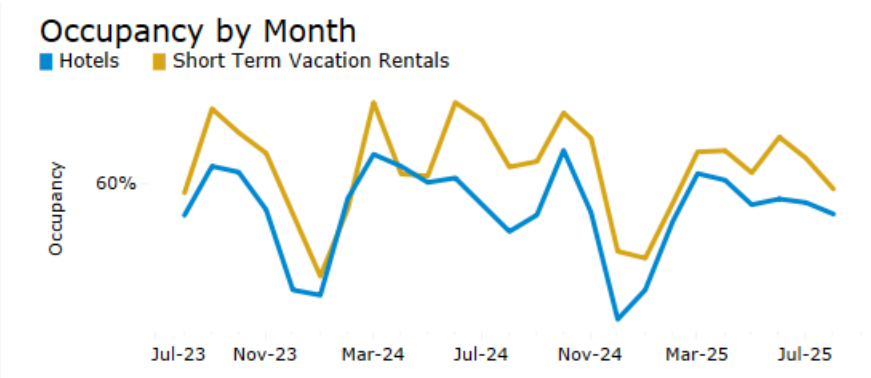


L&H Jobs  
15.4K  
+1.3% YOY

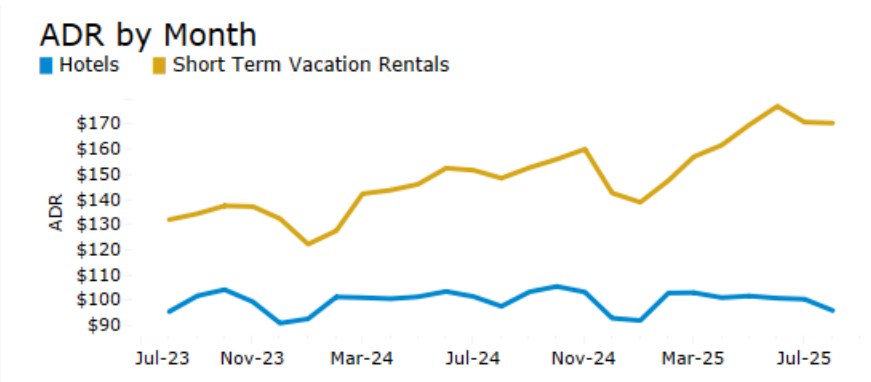
Source: Bureau of Labor Statistics



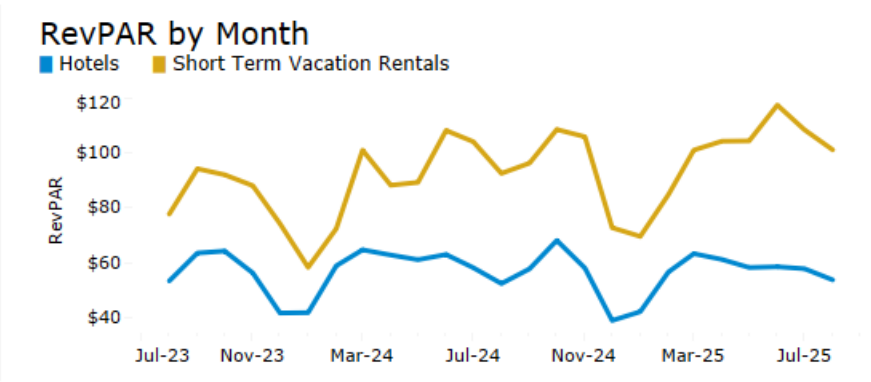
Aggregate Lodging Performance						
Sources: STR & AirDNA						
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Aug 2025	56.3%	\$105.02	\$59.14	172.6K	97.2K	\$10.2M
YOY % Change	+3.5% YOY	+1.8% YOY	+5.3% YOY	+2.2% YOY	+5.7% YOY	+7.6% YOY
Year-to-Date	56.9%	\$107.27	\$61.01	1.3M	763.3K	\$81.9M
YTD YOY % Change	-2.0% YOY	+2.5% YOY	+0.5% YOY	+6.3% YOY	+4.2% YOY	+6.8% YOY



Hotel Performance						
Source: STR						
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Aug 2025	55.9%	\$95.96	\$53.67	152.6K	85.4K	\$8.2M
YOY % Change	+4.4% YOY	-1.7% YOY	+2.6% YOY	-0.1% YOY	+4.3% YOY	+2.5% YOY
Year-to-Date	56.4%	\$99.94	\$56.34	1.2M	674.6K	\$67.4M
YTD YOY % Change	-2.1% YOY	-0.3% YOY	-2.3% YOY	+4.6% YOY	+2.5% YOY	+2.2% YOY



Short Term Vacation Rental Performance						
Source: AirDNA (All Properties)						
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Aug 2025	59.3%	\$170.41	\$101.01	20.0K	11.8K	\$2.0M
YOY % Change	-4.7% YOY	+14.7% YOY	+9.3% YOY	+23.3% YOY	+17.5% YOY	+34.8% YOY
Year-to-Date	61.0%	\$163.11	\$99.50	145.3K	88.6K	\$14.5M
YTD YOY % Change	-2.7% YOY	+13.7% YOY	+10.6% YOY	+22.4% YOY	+19.1% YOY	+35.4% YOY

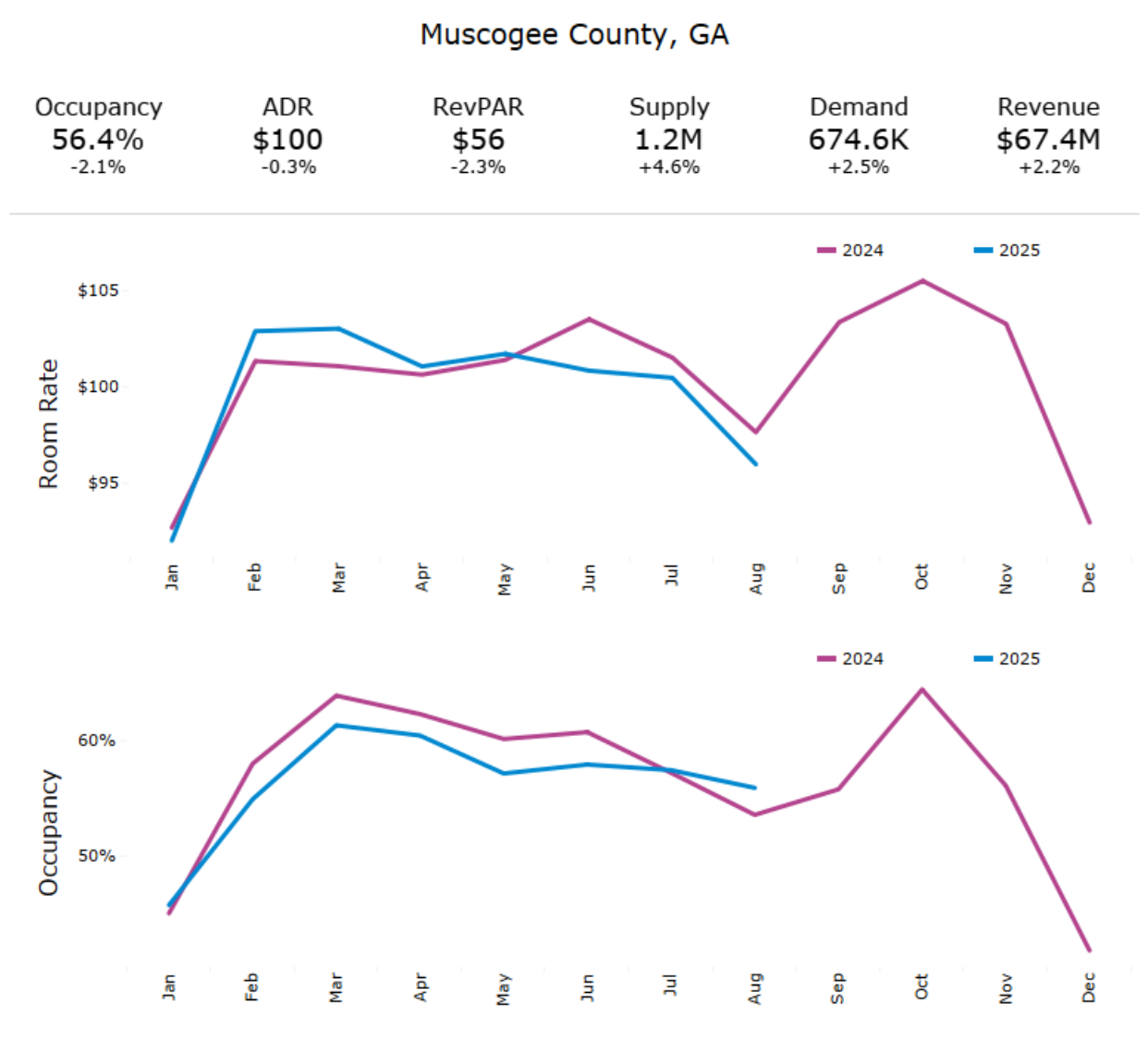


≡

Monthly Performance by Market

		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
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%
Aug	Muscogee County, GA	55.9%	+4.4%	\$96	-1.7%	\$54	+2.6%
	Russell County, AL	46.2%	+8.2%	\$99	-5.7%	\$46	+2.0%

Calendar Year-to-Date Performance



# Hotel Competitive Performance

III

## Monthly Performance by Market

		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Jun	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%	
Jul	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%	
Aug	Muscogee County, GA	55.9%	+4.4%	\$96	-1.7%	\$54	+2.6%
	Albany/Southwest, GA	49.2%	-4.4%	\$94	+4.6%	\$46	+0.0%
	Athens/Gainesville, GA	54.7%	-8.9%	\$138	+4.6%	\$75	-4.7%
	Auburn-Opelika, AL	64.0%	-8.9%	\$146	+2.0%	\$94	-7.1%
	Augusta, GA	60.4%	+0.4%	\$100	+3.3%	\$60	+3.7%
	Brunswick/Kingsland, ..	51.0%	-0.5%	\$166	+5.0%	\$85	+4.5%
	Cobb County, GA	62.8%	-2.2%	\$119	+3.6%	\$75	+1.3%
	DeKalb County, GA	60.0%	-2.8%	\$105	+0.4%	\$63	-2.5%
	Gwinnett County, GA	65.6%	+0.5%	\$93	+2.3%	\$61	+2.9%
	LaGrange, GA	60.1%	+3.7%	\$131	-2.1%	\$78	+1.5%
	LaGrange, GA+	60.1%	+3.7%	\$131	-2.1%	\$78	+1.5%
	Lowndes County, GA	53.4%	+4.1%	\$96	+9.3%	\$51	+13.7%
	Macon, GA	48.8%	-1.9%	\$86	-0.3%	\$42	-2.2%
	Montgomery, AL	64.5%	+1.5%	\$115	+0.5%	\$74	+2.0%
	Russell County, AL	46.2%	+8.2%	\$99	-5.7%	\$46	+2.0%
Savannah, GA	59.4%	-1.7%	\$127	+1.2%	\$75	-0.5%	

## Calendar Year-to-Date Performance

### Performance by Market

Occupancy	ADR	RevPAR
Savannah, GA 68.5%	Brunswick/Kingsland, GA \$169	Savannah, GA \$102
Lowndes County, GA	LaGrange, GA+ \$149	Brunswick/Kingsland, GA \$97
Montgomery, AL 65.7%	LaGrange, GA \$148	LaGrange, GA+ \$96
Gwinnett County, GA 65.6%	Savannah, GA \$138	LaGrange, GA \$81
Cobb County, GA 65.1%	Athens/Gainesville, AL \$133	Auburn-Opelika, AL \$80
LaGrange, GA+ 64.6%	Augusta, GA \$126	Athens/Gainesville, GA \$80
LaGrange, GA 64.5%	Cobb County, GA \$121	Augusta, GA \$79
Augusta, GA 63.2%	Montgomery, AL \$114	Cobb County, GA \$79
DeKalb County, GA 61.2%	DeKalb County, GA \$105	Montgomery, AL \$75
Auburn-Opelika, AL 60.6%	Lowndes County, GA \$105	Lowndes County, GA \$70
Athens/Gainesville, GA 58.3%	Muscogee County, GA \$100	DeKalb County, GA \$64
Brunswick/Kingsland, GA 57.6%	Russell County, AL \$100	Gwinnett County, GA \$62
Muscogee County, GA 56.4%	Albany/Southwest, GA \$96	Muscogee County, GA \$56
Albany/Southwest, GA 54.5%	Gwinnett County, GA \$95	Albany/Southwest, GA \$52
Macon, GA 52.5%	Macon, GA \$91	Russell County, AL \$48
Russell County, AL 48.2%		Macon, GA \$48

### % Change vs. Previous Year

Occupancy % Change	ADR % Change	RevPAR % Change
Lowndes County, GA	Lowndes County, GA	Lowndes County, GA +32.0%
Russell County, AL +10.7%	Augusta, GA +7.1%	Augusta, GA
Augusta, GA +6.0%	Cobb County, GA +4.6%	Russell County, AL +4.6%
Montgomery, AL +2.1%	Albany/Southwest, GA +4.5%	Albany/Southwest, GA +4.2%
Macon, GA +1.4%	Athens/Gainesville, GA +4.2%	Montgomery, AL +3.8%
Brunswick/Kingsland, GA +0.6%	Auburn-Opelika, AL +3.3%	Cobb County, GA +3.4%
Auburn-Opelika, AL +0.0%	Gwinnett County, GA +1.8%	Auburn-Opelika, AL +3.3%
Albany/Southwest, GA -0.3%	Montgomery, AL +1.7%	Macon, GA +2.0%
Cobb County, GA -1.2%	Macon, GA +0.6%	Brunswick/Kingsland, GA +0.6%
Gwinnett County, GA -1.6%	Brunswick/Kingsland, GA +0.0%	Gwinnett County, GA +0.1%
DeKalb County, GA -1.9%	Muscogee County, GA -0.3%	Athens/Gainesville, GA -1.0%
Muscogee County, GA -2.1%	DeKalb County, GA -0.7%	Muscogee County, GA -2.3%
LaGrange, GA+ -3.1%	Savannah, GA -1.2%	DeKalb County, GA -2.6%
Savannah, GA -3.4%	LaGrange, GA+ -1.6%	Savannah, GA -4.6%
LaGrange, GA -3.4%	LaGrange, GA -1.8%	LaGrange, GA+ -4.6%
Athens/Gainesville, GA -5.0%	Russell County, AL -5.5%	LaGrange, GA -5.2%

III

Monthly Performance by Market

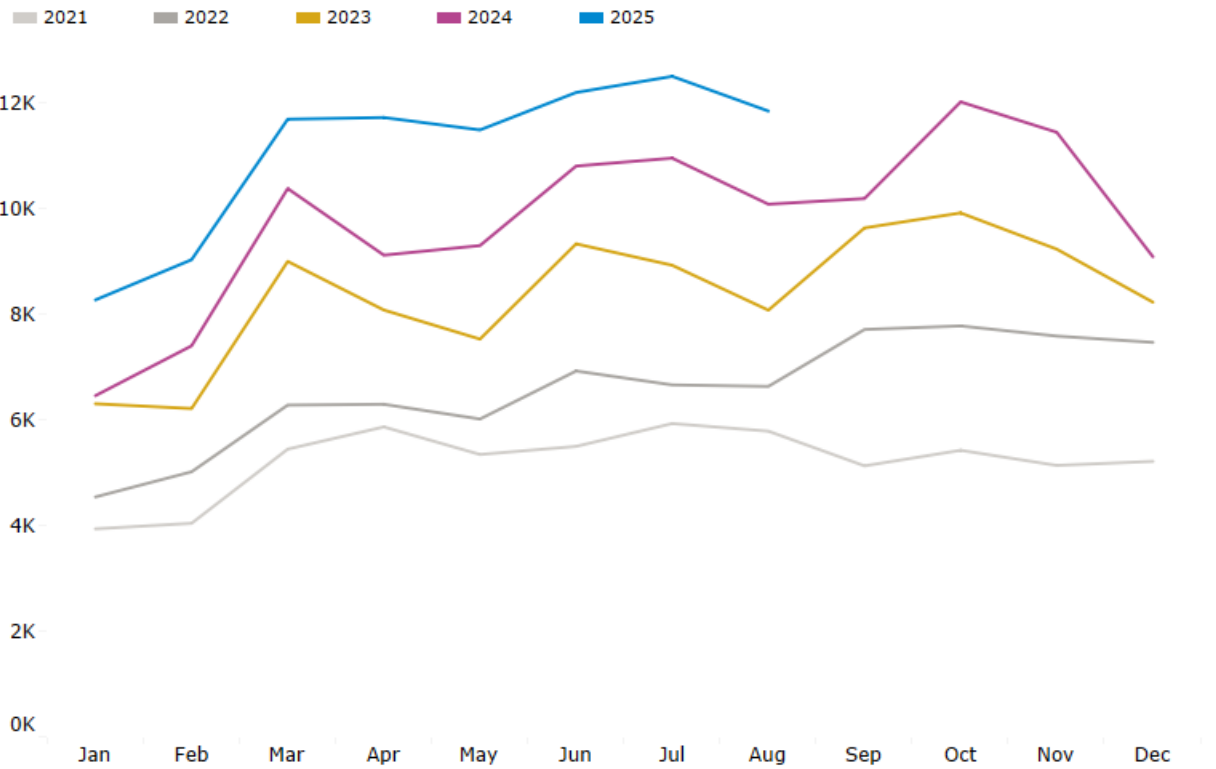
		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Jun	Columbus	66.2%	-6.5%	\$177	+16.1%	\$117	+8.5%
Jul	Columbus	63.4%	-7.5%	\$171	+12.6%	\$108	+4.1%
Aug	Columbus	59.3%	-4.7%	\$170	+14.7%	\$101	+9.3%

Calendar Year-to-Date Performance

Columbus All Properties					
Occupancy	ADR	RevPAR	Supply	Demand	Revenue
61.0%	\$163	\$100	145.3K	88.6K	\$14.5M
-2.7%	+13.7%	+10.6%	+22.4%	+19.1%	+35.4%

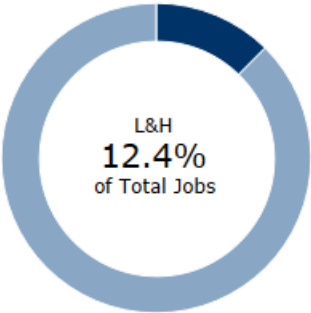
Short Term Rental Demand by Month

Last Five Calendar Years



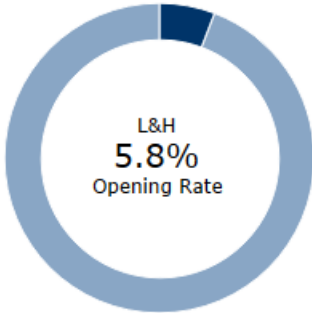
Total Leisure & Hospitality Jobs

L&H Jobs  
as of August 2025  
**15.4K**  
+1.3% YOY | +0.0% vs. 2019

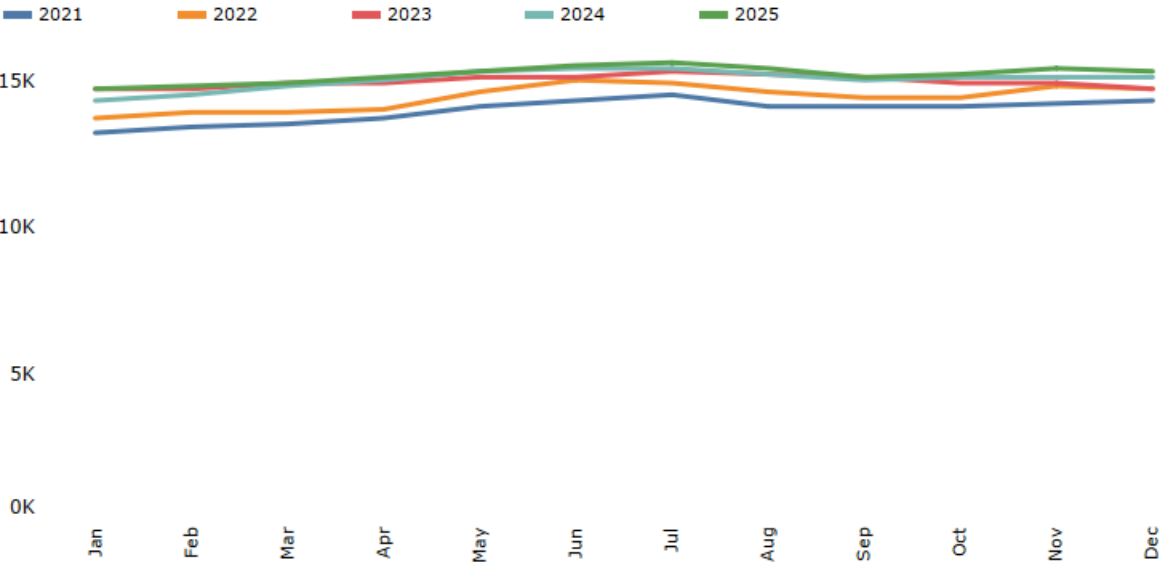


Leisure & Hospitality Job Openings

L&H Job Openings  
as of August 2025  
**948**  
+10.6% YOY | +19.3% vs. 2019



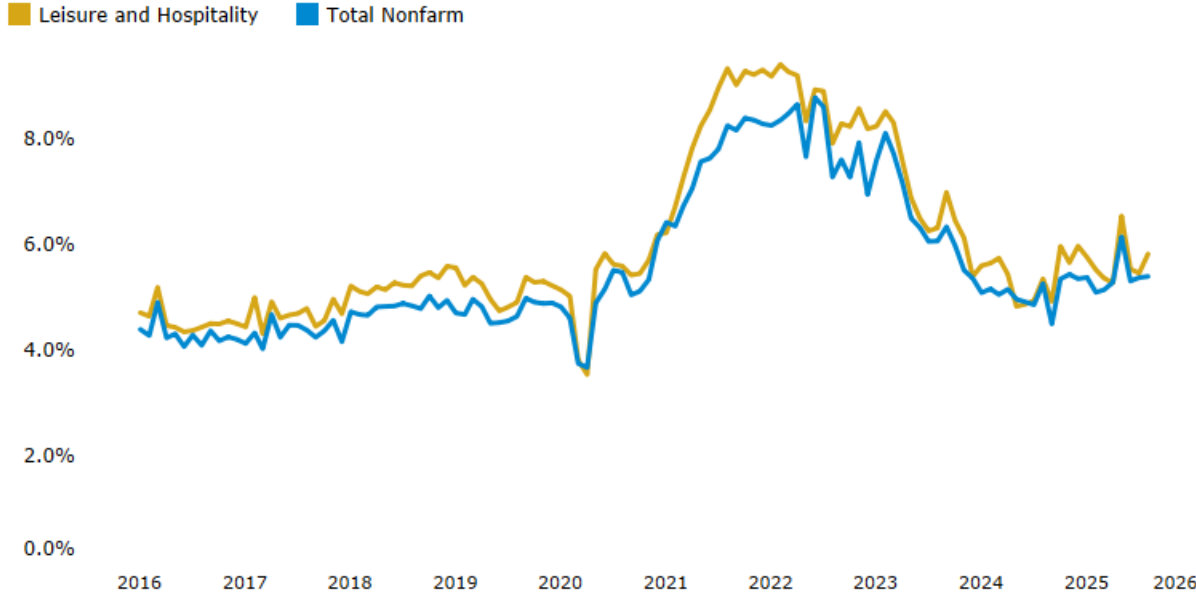
Employment Recovery  
Leisure & Hospitality Jobs (Thousands)



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

August 2025 Volume

2.6M

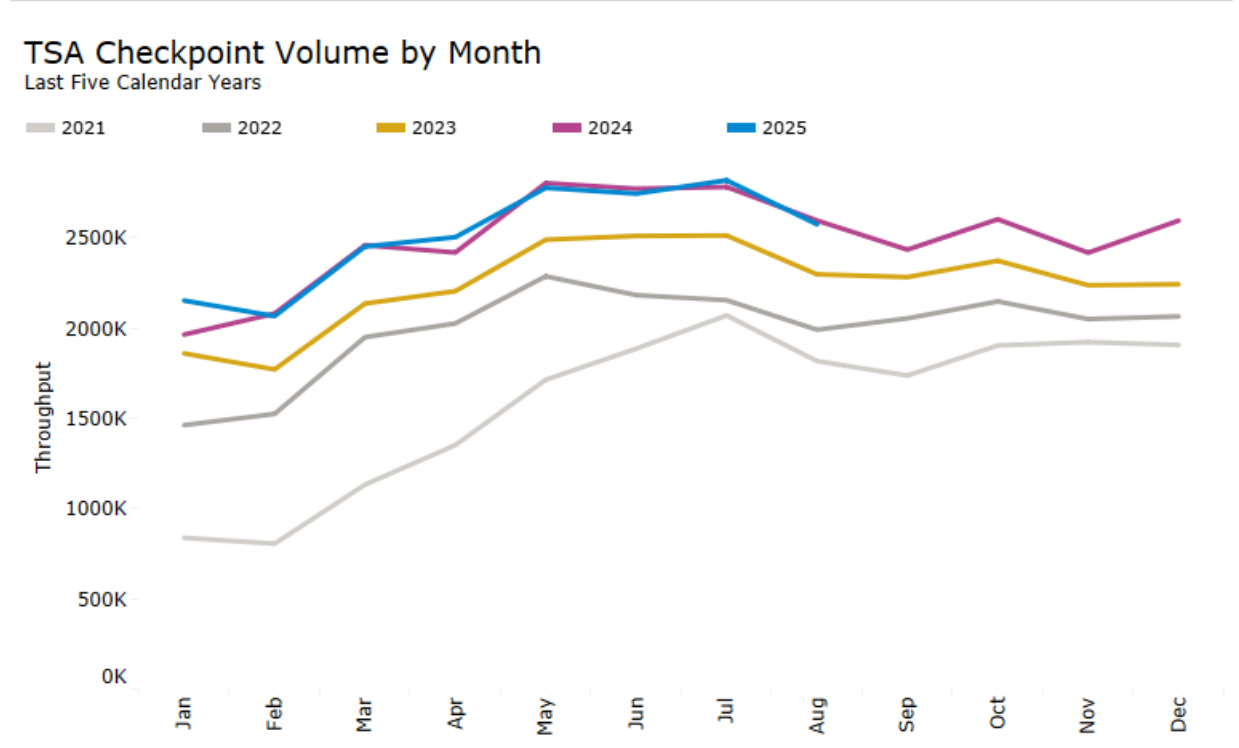
-0.8% YOY

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

Jan - Aug 2025 Volume

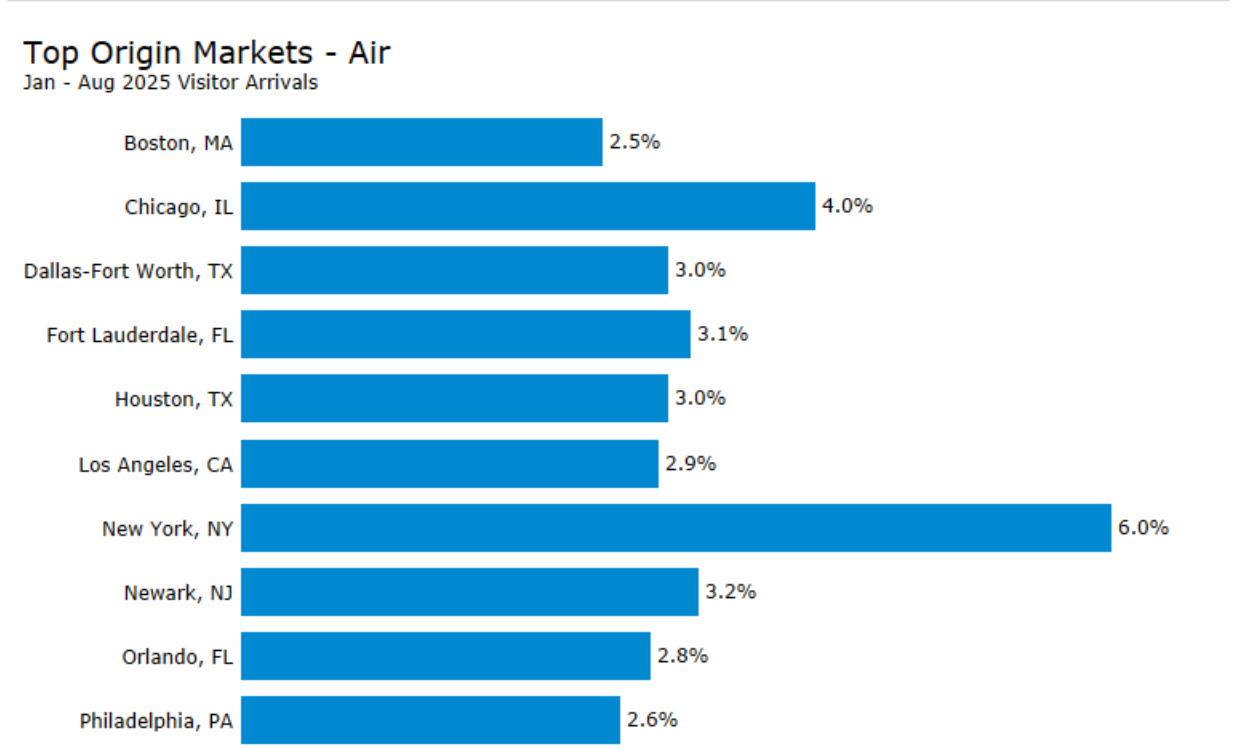
20.1M

+1.1% YOY



Source: Transportation Security Administration

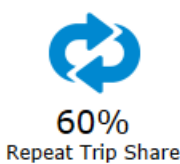
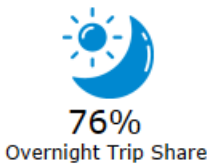
Source: Transportation Security Administration



Source: OAG

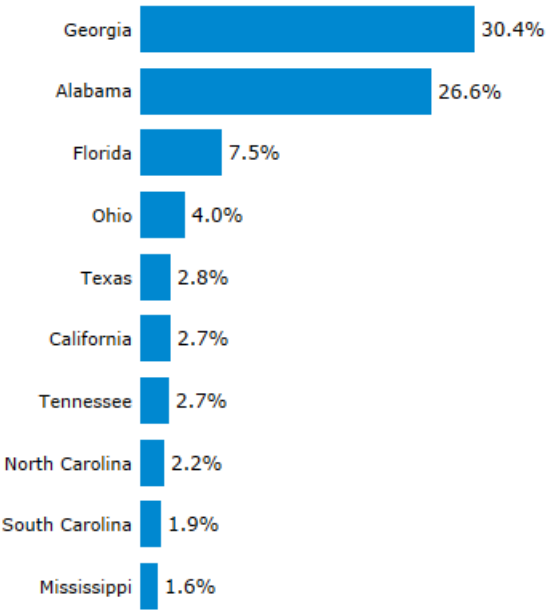


August 2025 Domestic Visits

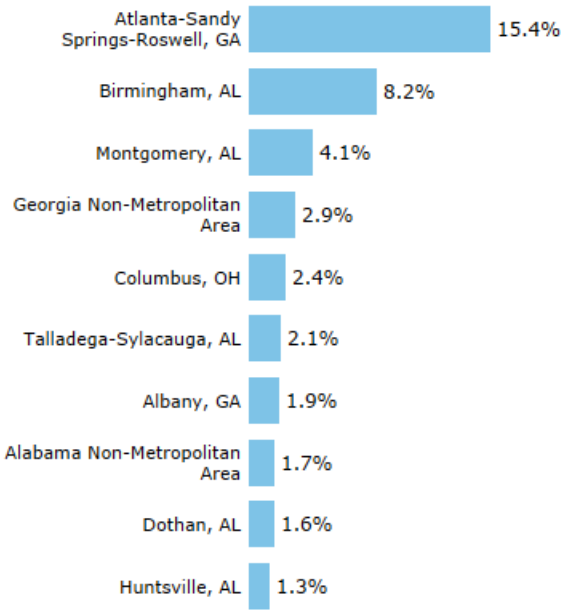


Top Origin Markets

States

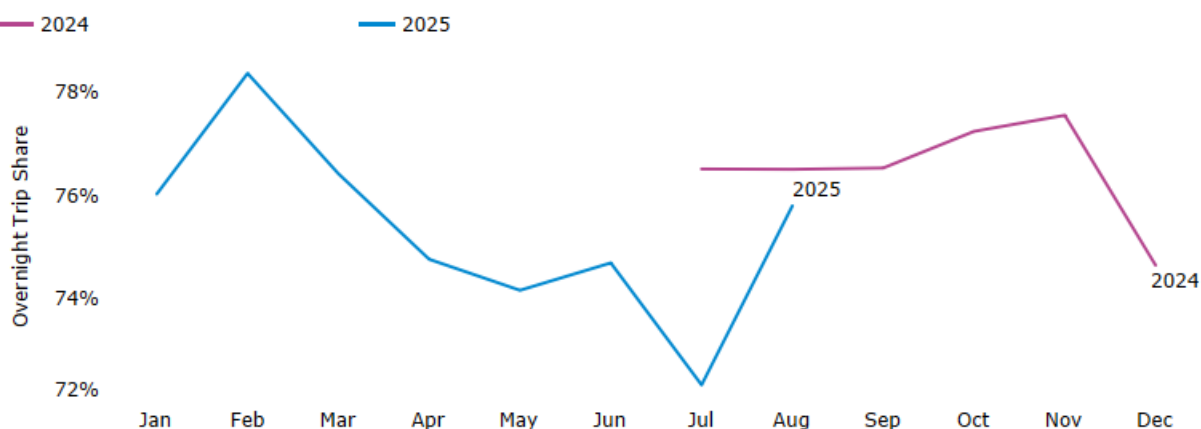


MSA

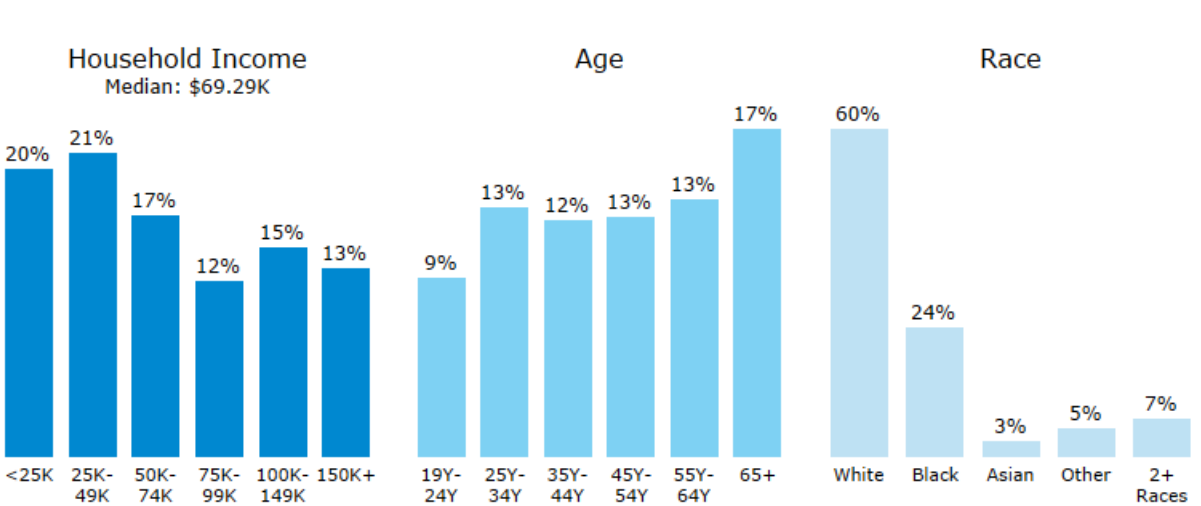


Domestic Visitor Trends & Characteristics

Overnight Trip Share by Month

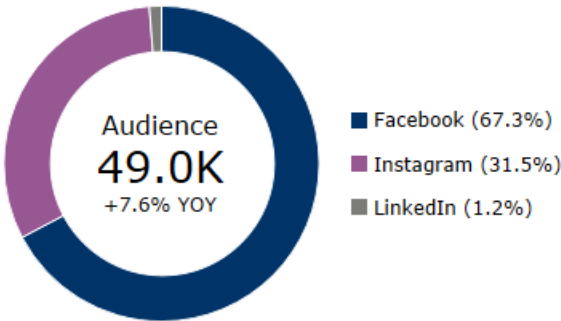


August 2025 Visitor Origin Demographics

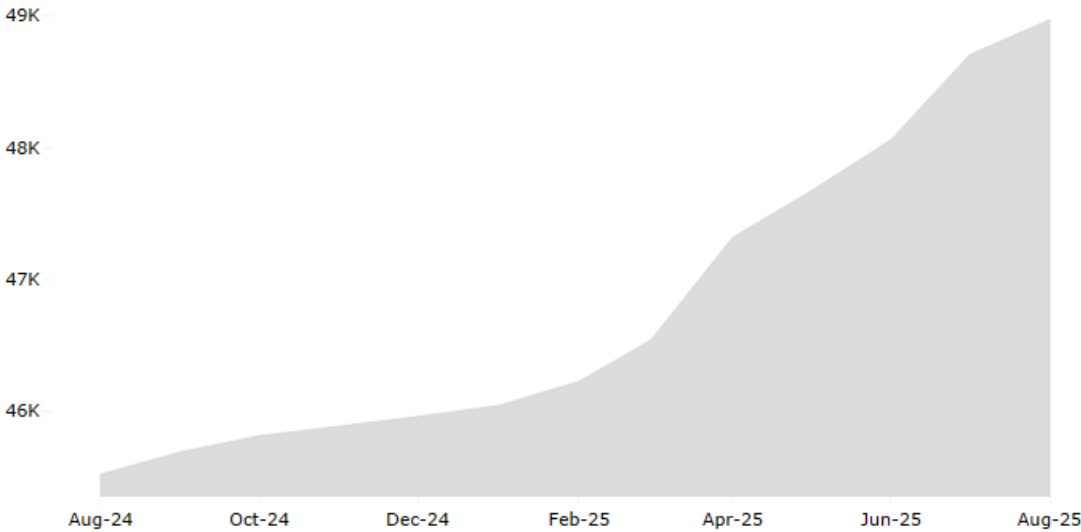




Audience Overview



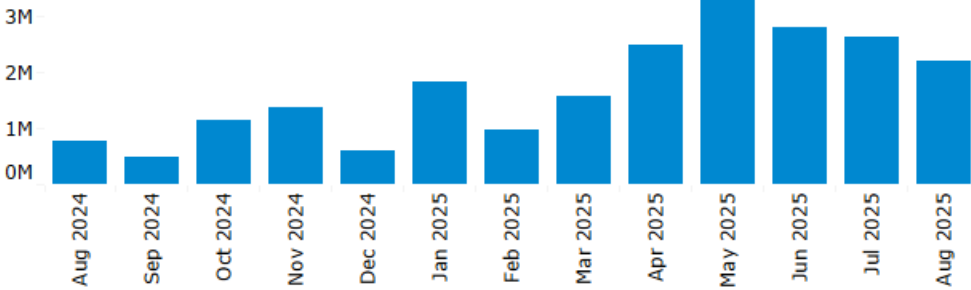
Audience by Month



Engagements & Impressions

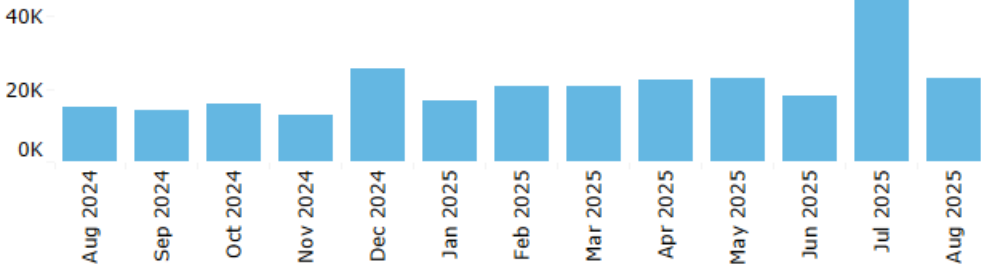
Impressions

August 2025  
2.2M  
+188.1% YOY



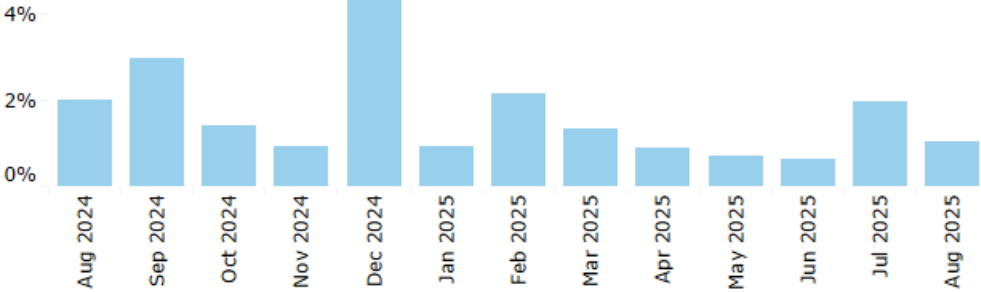
Engagements

August 2025  
22.7K  
+49.8% YOY



Engagement Rate

August 2025  
1.0%  
-1.0% pt YOY



# Website Performance Summary

August 2025 | Properties: All



Users  
**32.2K**  
+15.3% YOY



Sessions  
**35.4K**  
+11.8% YOY



Engaged Sessions  
**12.7K**  
-14.9% YOY



Engagement Rate  
**35.8%**  
-11.26% pt YOY



Page Views  
**57.1K**  
+7.2% YOY



Pages Per Session  
**1.61 pages**  
-0.07 pages YOY

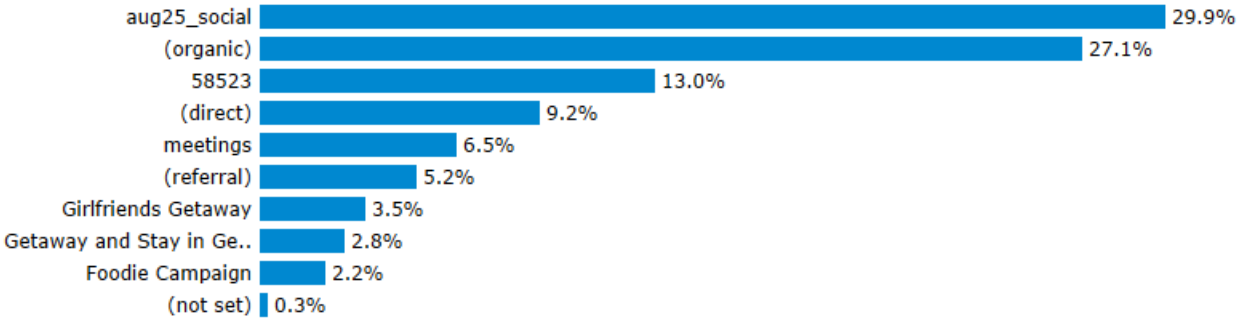


Avg. Session Duration  
**00:01:28**  
-4 sec YOY

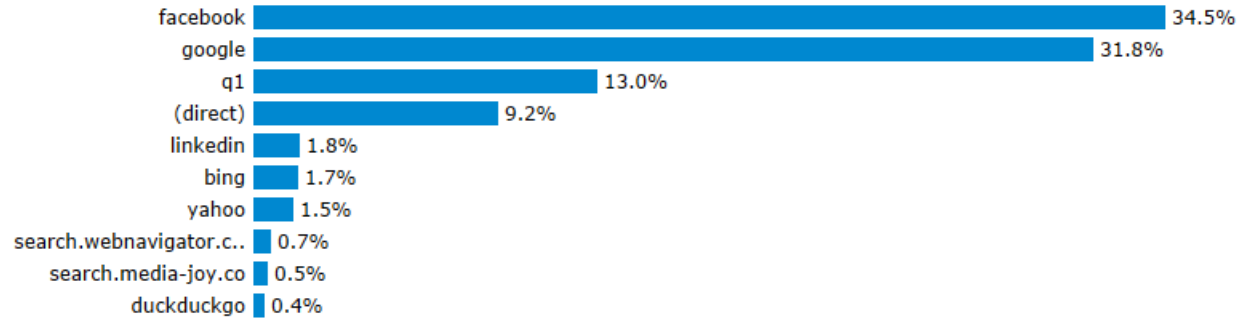


Bounce Rate  
**64.2%**  
+11.26% pt YOY

## Campaigns

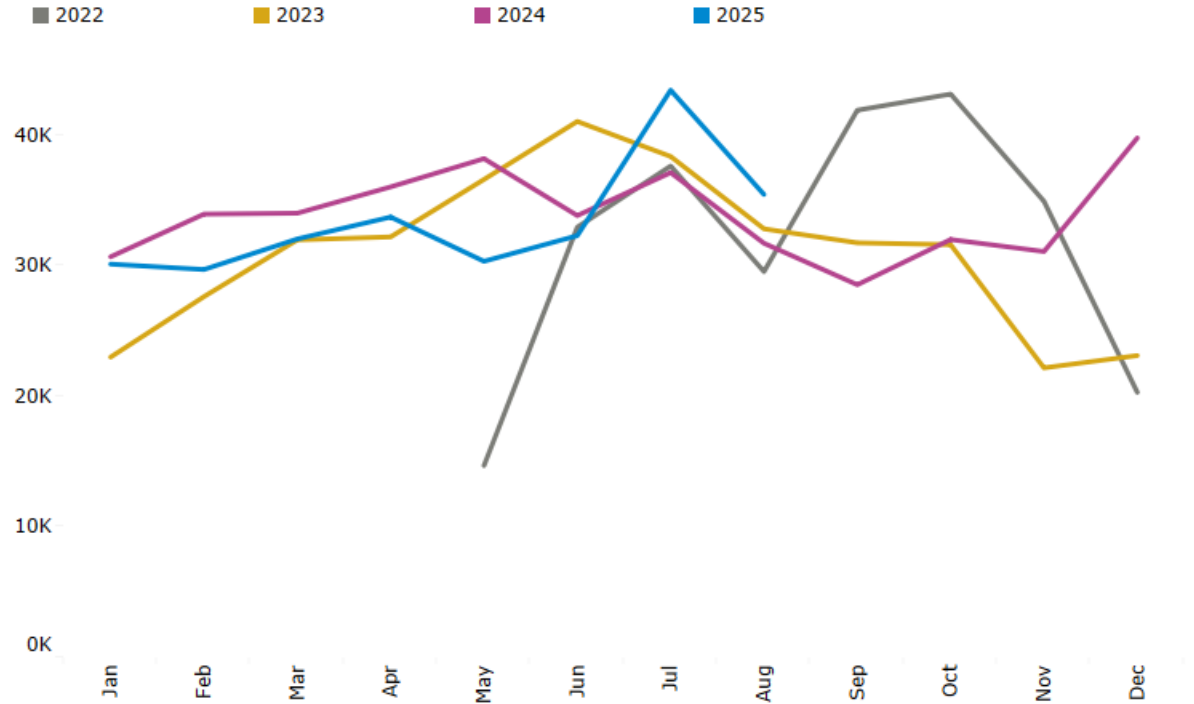


## Sources



## 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

August 2025



## Facebook



Audience  
32.9K  
+4.3% YOY

Engagement Rate	1.0%
Impressions	2,024,197
Video Views	65,994
Engagements	19,848
Comments	175
Reactions	1,741
Shares	190
Post Link Clicks	13,401
Other Post Clicks	4,341

## Instagram



Audience  
15.4K  
+10.7% YOY

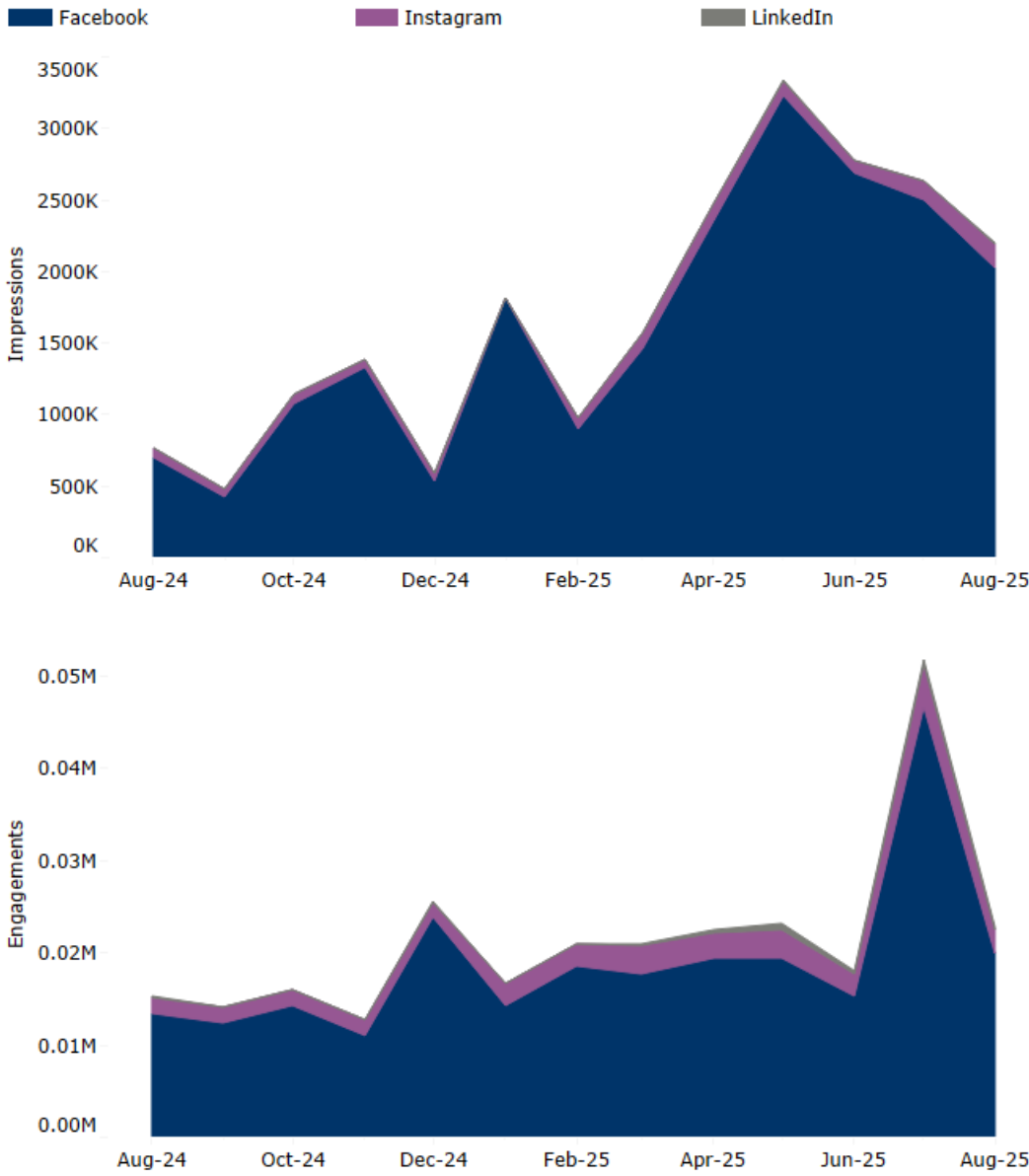
Engagement Rate	1.5%
Impressions	167,680
Video Views	10,313
Engagements	2,549
Comments	112
Reactions	2,067
Saves	
Shares	303

## LinkedIn



Audience  
598

Engagement Rate	12.6%
Impressions	2,699
Video Views	
Engagements	339
Comments	1
Reactions	121
Shares	4
Post Link Clicks	



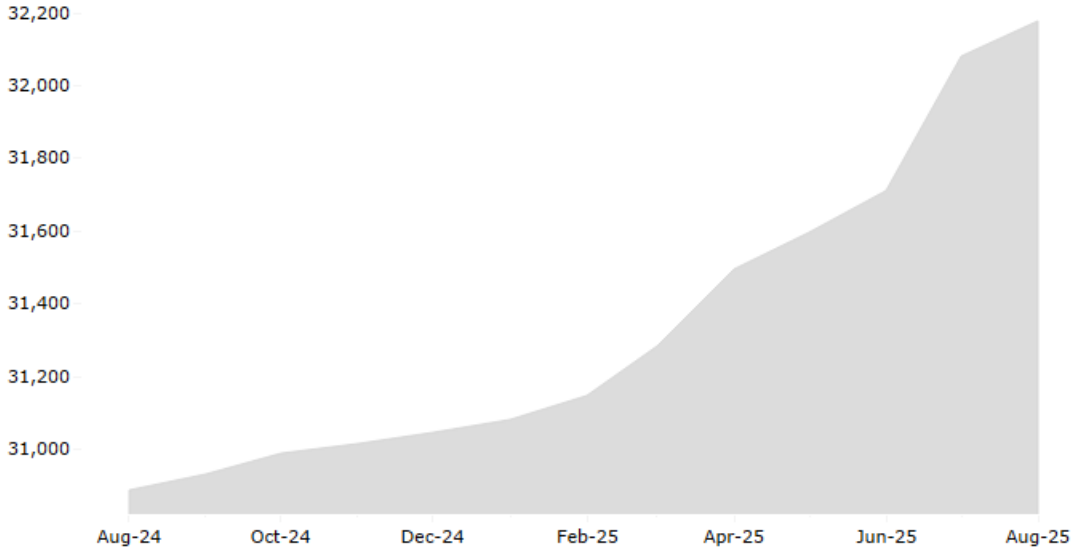




Audience Overview

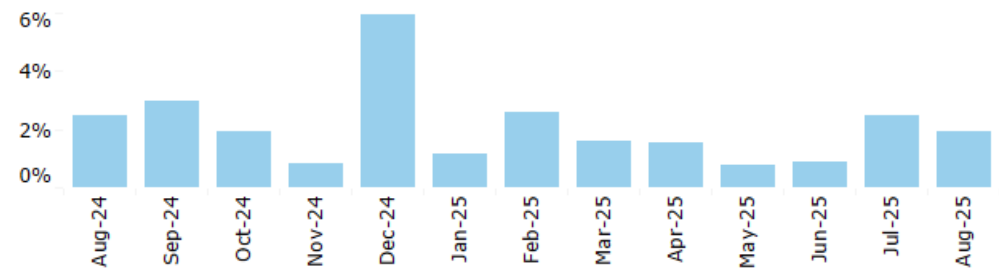
Audience  
August 2025  
**32.2K**  
+4.2% YOY

Audience by Month

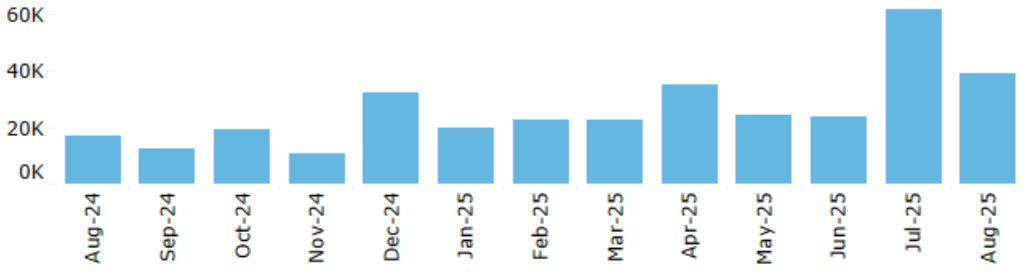


Engagements & Impressions

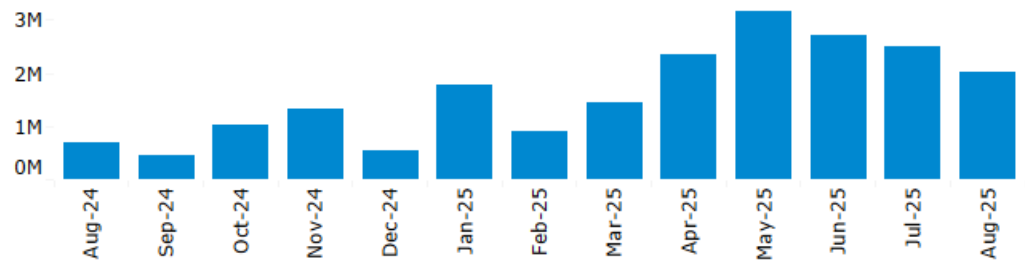
Engagement  
Rate  
August 2025  
**1.9%**  
-0.5% pt YOY



Engagements  
August 2025  
**38.9K**  
+125.4% YOY

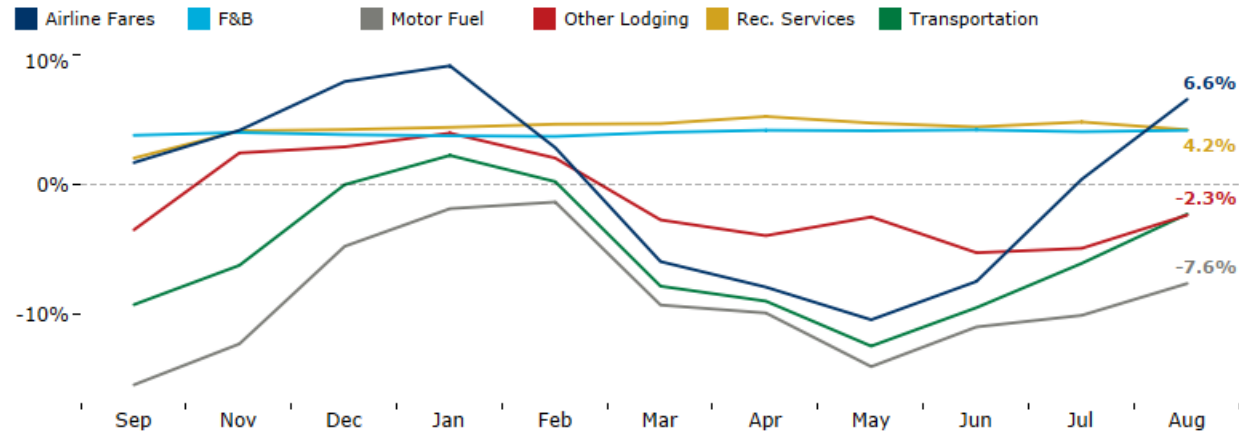


Total  
Impressions  
August 2025  
**2.0M**  
+187.4% YOY



Travel Price Index

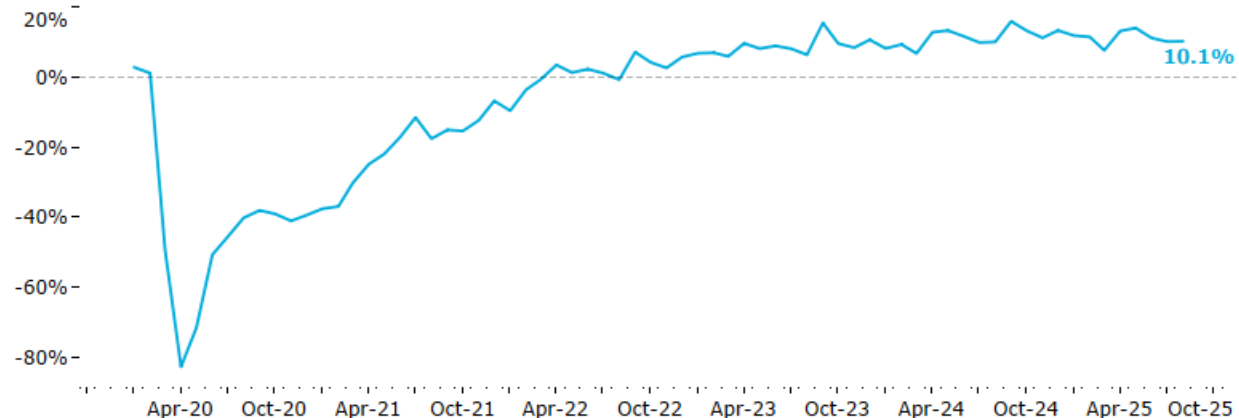
% Change Relative to Same Month in Previous Year | Last 12 Months



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

Travel Spending (% change vs 2019)

% Change vs. 2019 | U.S. total

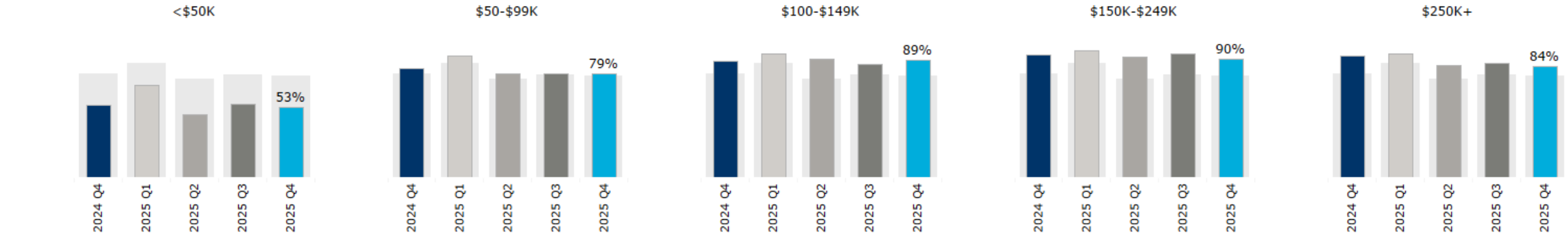


Source: Tourism Economics via U.S. Travel Recovery Tracker

Planning Leisure Travel Within the Next 12 Months

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

2024 Q4 2025 Q1 2025 Q2 2025 Q3 2025 Q4

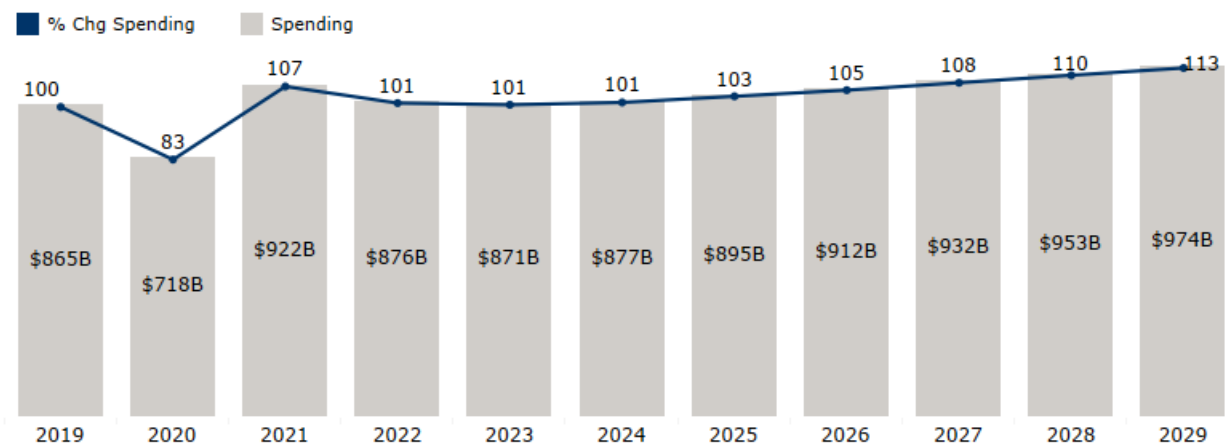


Note: Light gray bars represent the average for all survey respondents  
Source: MMGY Global's Portrait of American Travelers

# Domestic Travel Forecast

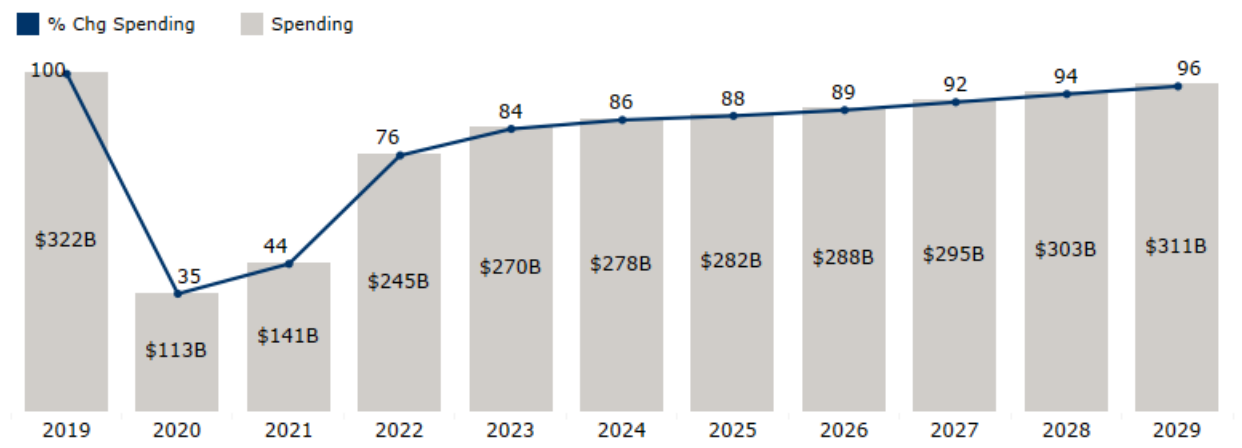
## Real Domestic Leisure Travel Spending

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



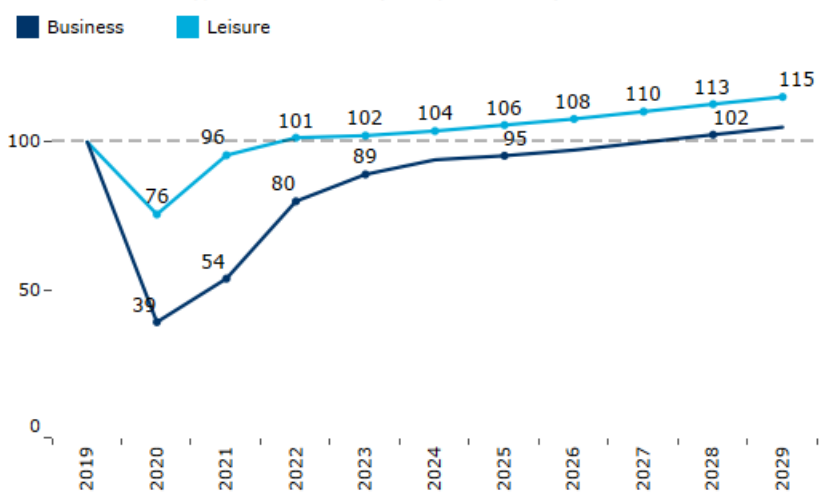
## Real Domestic Business Travel Spending

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



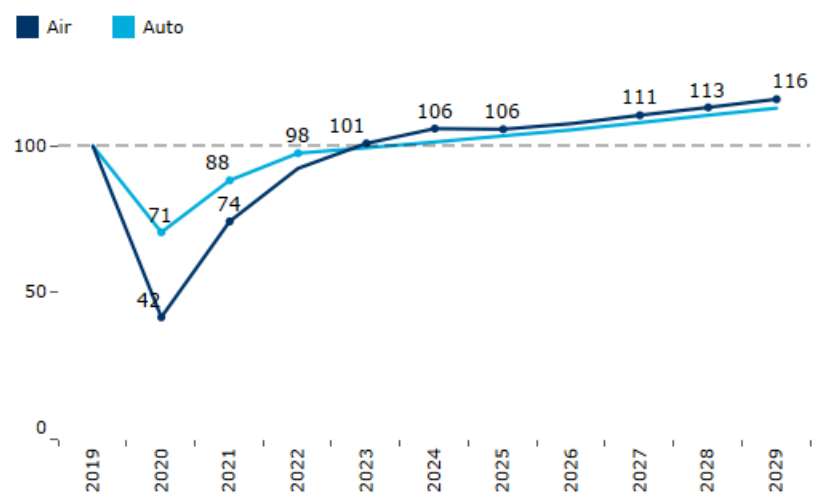
## Leisure vs. Business Travel Volume

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



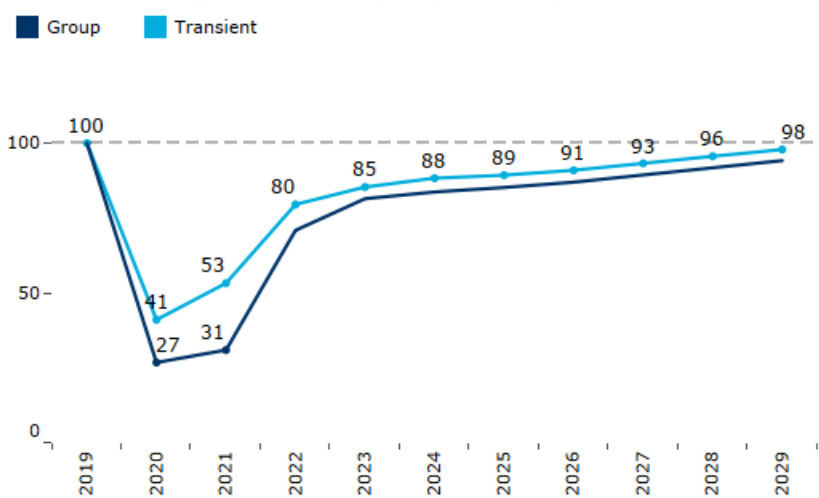
## Auto vs. Air Travel Volume

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

Powered by Symphony | Tourism Economics

