



Monthly Summary Report

September 2025

X Month

September 2025

Highlights


Demand for Muscogee County hotels increased 8.3% YOY in September. Due to supply only declining 0.1% over the same period, occupancy increased a reflective 8.4% to 60.5%. Short-term rental demand increased 6% YOY, but due to supply gains of 17.7% over the same period, occupancy declined 9.9% to 57.6%.

Hotel ADR decreased 1.7% YOY to \$102, but was offset by an increase in demand therefore revenue still increased 6.4% YOY to \$9.1M. Short-term rental ADR increased 12.1% compared to the previous year at \$170, which helped drive revenue up 18.8% YOY due to demand increases reaching \$1.8M.

Marketing metrics continued their growth in September, as website sessions increased 19.3% YOY, while total social media audience increased 7.7% YOY.

Consumer confidence remains near a 10-year low as concerns over inflation, job stability, and policy direction continue to weigh on sentiment, prompting more cautious spending behavior.

The September State of the American Traveler survey found that nearly nine in ten Americans have a trip planned in the next year, expecting to spend an average of \$6,184—well above the long-term average of \$4,612.




Hotel Demand

88.9K

+7.8% YOY

Source: STR




Hotel ADR

\$101.73

-1.6% YOY

Source: STR




ATL Checkpoint Volume

2.4M

-0.2% YOY

Source: TSA




Social Media Audience

49.2K

+7.6% YOY

Source: Sprout Social




Facebook Audience

32.2K

+4.2% YOY

Source: Meta




Website Sessions

34.0K

+19.3% YOY


Source: Google Analytics



Overnight Trip Share

70%

Source: Azira



L&H Jobs

15.1K

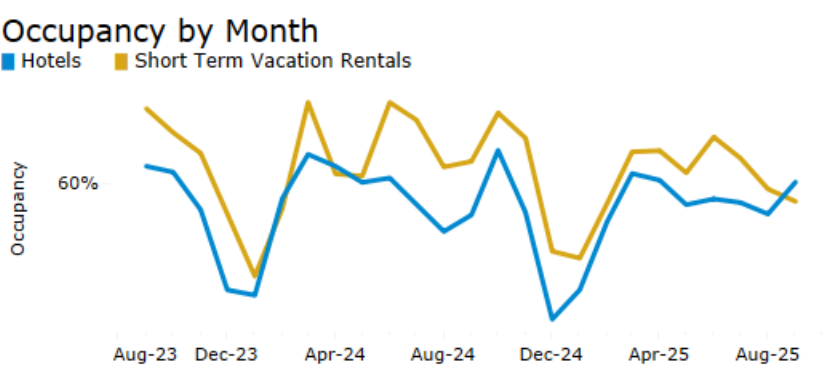
+0.7% YOY

Source: Bureau of Labor Statistics

Aggregate Lodging Performance

Sources: STR & AirDNA

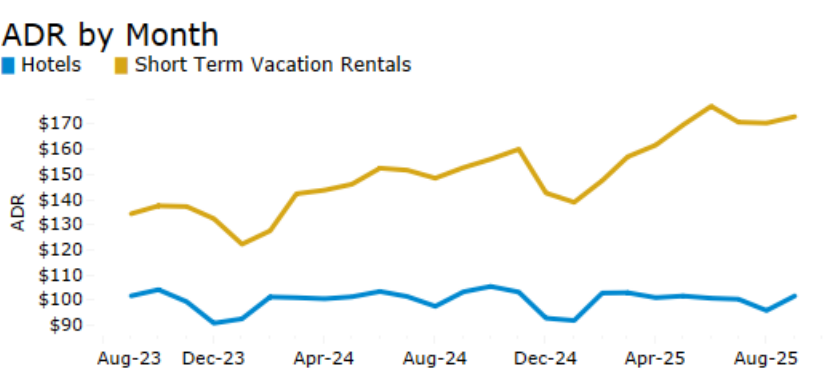
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Sep 2025	59.9%	\$109.75	\$65.73	167.3K	100.2K	\$11.0M
YOY % Change	+6.0% YOY	+0.9% YOY	+6.9% YOY	+2.0% YOY	+8.1% YOY	+9.1% YOY
Year-to-Date	57.2%	\$107.56	\$61.53	1.5M	863.4K	\$92.9M
YTD YOY % Change	-1.1% YOY	+2.4% YOY	+1.2% YOY	+5.8% YOY	+4.6% YOY	+7.1% YOY



Hotel Performance

Source: STR

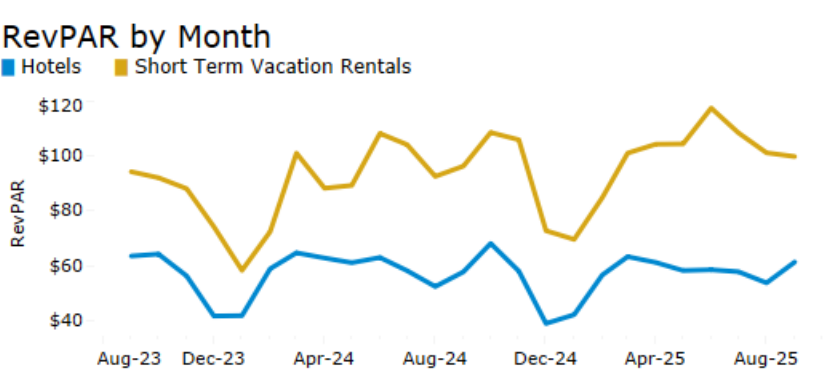
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Sep 2025	60.2%	\$101.73	\$61.24	147.7K	88.9K	\$9.0M
YOY % Change	+7.9% YOY	-1.6% YOY	+6.2% YOY	-0.1% YOY	+7.8% YOY	+6.1% YOY
Year-to-Date	56.8%	\$100.15	\$56.88	1.3M	763.5K	\$76.5M
YTD YOY % Change	-1.0% YOY	-0.4% YOY	-1.4% YOY	+4.1% YOY	+3.1% YOY	+2.6% YOY



Short Term Vacation Rental Performance

Source: AirDNA (All Properties)

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Sep 2025	57.6%	\$172.97	\$99.66	19.6K	11.3K	\$2.0M
YOY % Change	-8.5% YOY	+13.3% YOY	+3.6% YOY	+21.2% YOY	+10.9% YOY	+25.6% YOY
Year-to-Date	60.6%	\$164.23	\$99.52	164.8K	99.9K	\$16.4M
YTD YOY % Change	-3.4% YOY	+13.6% YOY	+9.7% YOY	+22.3% YOY	+18.1% YOY	+34.2% YOY

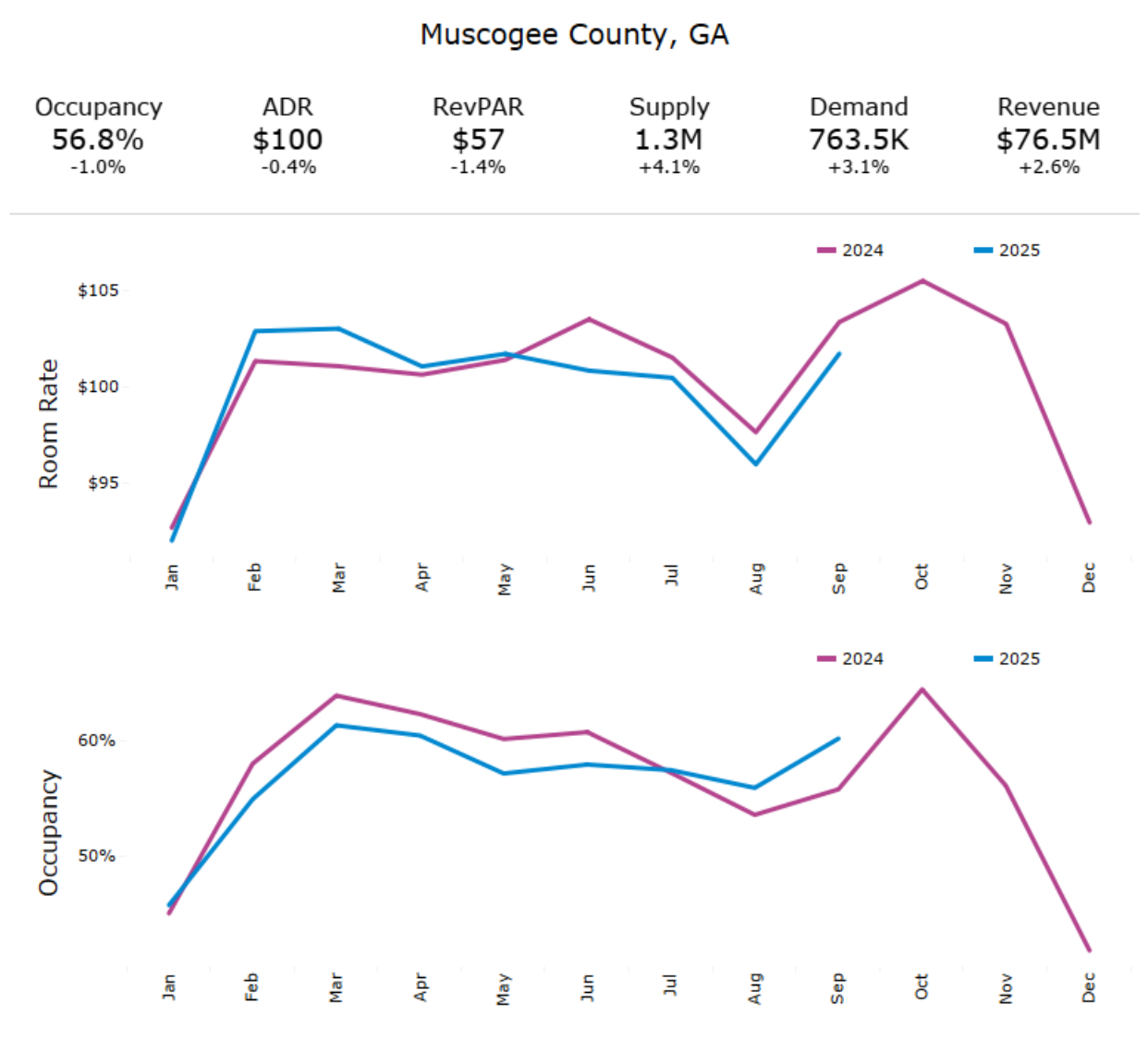


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Monthly Performance by Market

		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
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%
Sep	Muscogee County, GA	60.2%	+7.9%	\$102	-1.6%	\$61	+6.2%
	Russell County, AL	51.5%	+12.7%	\$106	-6.1%	\$54	+5.9%

Calendar Year-to-Date Performance



Hotel Competitive Performance

III

Monthly Performance by Market

		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
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%	
Sep	Muscogee County, GA	60.2%	+7.9%	\$102	-1.6%	\$61	+6.2%
	Albany/Southwest, GA	48.8%	-7.9%	\$96	+2.2%	\$47	-5.9%
	Athens/Gainesville, GA	56.2%	-11.2%	\$169	+19.3%	\$95	+5.9%
	Auburn-Opelika, AL	57.7%	-5.9%	\$174	-16.3%	\$100	-21.3%
	Augusta, GA	60.7%	+13.1%	\$99	+4.9%	\$60	+18.7%
	Brunswick/Kingsland, ..	52.0%	+1.3%	\$128	-14.0%	\$66	-12.9%
	Cobb County, GA	60.6%	-5.3%	\$112	-2.4%	\$68	-7.6%
	DeKalb County, GA	56.2%	-6.8%	\$102	+0.1%	\$57	-6.8%
	Gwinnett County, GA	63.5%	-2.4%	\$93	+0.0%	\$59	-2.4%
	LaGrange, GA	66.0%	+11.7%	\$114	-8.7%	\$75	+2.0%
	LaGrange, GA+	66.0%	+11.7%	\$114	-8.7%	\$75	+2.0%
	Lowndes County, GA	50.6%	-0.7%	\$96	+7.0%	\$49	+6.2%
	Macon, GA	49.3%	-10.2%	\$88	+0.8%	\$43	-9.5%
	Montgomery, AL	62.3%	+0.4%	\$113	+0.4%	\$70	+0.8%
	Russell County, AL	51.5%	+12.7%	\$106	-6.1%	\$54	+5.9%
Savannah, GA	60.9%	-11.3%	\$139	+0.4%	\$85	-11.0%	

Calendar Year-to-Date Performance

Performance by Market

Occupancy	ADR	RevPAR
Savannah, GA 67.6%	Brunswick/Kingsland, GA \$165	Savannah, GA \$100
Gwinnett County, GA 65.3%	Savannah, GA \$145	LaGrange, GA+ \$94
Montgomery, AL 65.3%	LaGrange, GA \$145	LaGrange, GA \$94
Lowndes County, GA 64.9%	LaGrange, GA \$142	Brunswick/Kingsland, GA \$82
LaGrange, GA+ 64.8%	Athens/Gainesville, GA \$138	Auburn-Opelika, AL \$83
LaGrange, GA 64.6%	Auburn-Opelika, AL \$123	Athens/Gainesville, GA \$82
Cobb County, GA 64.5%	Augusta, GA \$120	Cobb County, GA \$77
Augusta, GA 62.9%	Cobb County, GA \$113	Augusta, GA \$77
DeKalb County, GA 60.6%	Montgomery, AL \$104	Montgomery, AL \$74
Auburn-Opelika, AL 60.3%	DeKalb County, GA \$104	Lowndes County, GA \$67
Athens/Gainesville, GA 58.0%	Lowndes County, GA \$100	DeKalb County, GA \$63
Brunswick/Kingsland, GA 56.9%	Russell County, AL \$94	Gwinnett County, GA \$62
Muscogee County, GA 56.8%	Muscogee County, GA \$94	Muscogee County, GA \$57
Albany/Southwest, GA 53.8%	Albany/Southwest, GA \$91	Albany/Southwest, GA \$52
Macon, GA 52.1%	Gwinnett County, GA \$91	Russell County, AL \$49
Russell County, AL 48.6%	Macon, GA \$91	Macon, GA \$47

% Change vs. Previous Year

Occupancy % Change	ADR % Change	RevPAR % Change
Lowndes County, GA +10.9%	Lowndes County, GA +6.8%	Lowndes County, GA +29.3%
Russell County, AL +6.8%	Augusta, GA +6.1%	Augusta, GA +4.7%
Augusta, GA +1.9%	Athens/Gainesville, GA +4.2%	Russell County, AL +3.5%
Montgomery, AL +0.6%	Albany/Southwest, GA +3.8%	Montgomery, AL +2.9%
Brunswick/Kingsland, GA -0.1%	Cobb County, GA +1.6%	Albany/Southwest, GA +2.1%
Macon, GA -0.7%	Montgomery, AL +1.6%	Cobb County, GA +0.6%
Auburn-Opelika, AL -1.0%	Gwinnett County, GA +0.7%	Macon, GA -0.1%
Muscogee County, GA -1.3%	Macon, GA -0.4%	Athens/Gainesville, GA -0.2%
Albany/Southwest, GA -1.5%	Muscogee County, GA -0.6%	Gwinnett County, GA -0.8%
LaGrange, GA+ -1.7%	DeKalb County, GA -0.9%	Brunswick/Kingsland, GA -1.4%
Cobb County, GA -1.7%	Auburn-Opelika, AL -1.0%	Muscogee County, GA -1.6%
Gwinnett County, GA -1.9%	Savannah, GA -1.4%	Auburn-Opelika, AL -3.0%
LaGrange, GA -2.5%	Brunswick/Kingsland, GA -2.5%	DeKalb County, GA -4.0%
DeKalb County, GA -4.4%	LaGrange, GA+ -2.7%	LaGrange, GA+ -4.5%
Savannah, GA -5.8%	Russell County, AL -5.6%	Savannah, GA -5.3%

III

Monthly Performance by Market

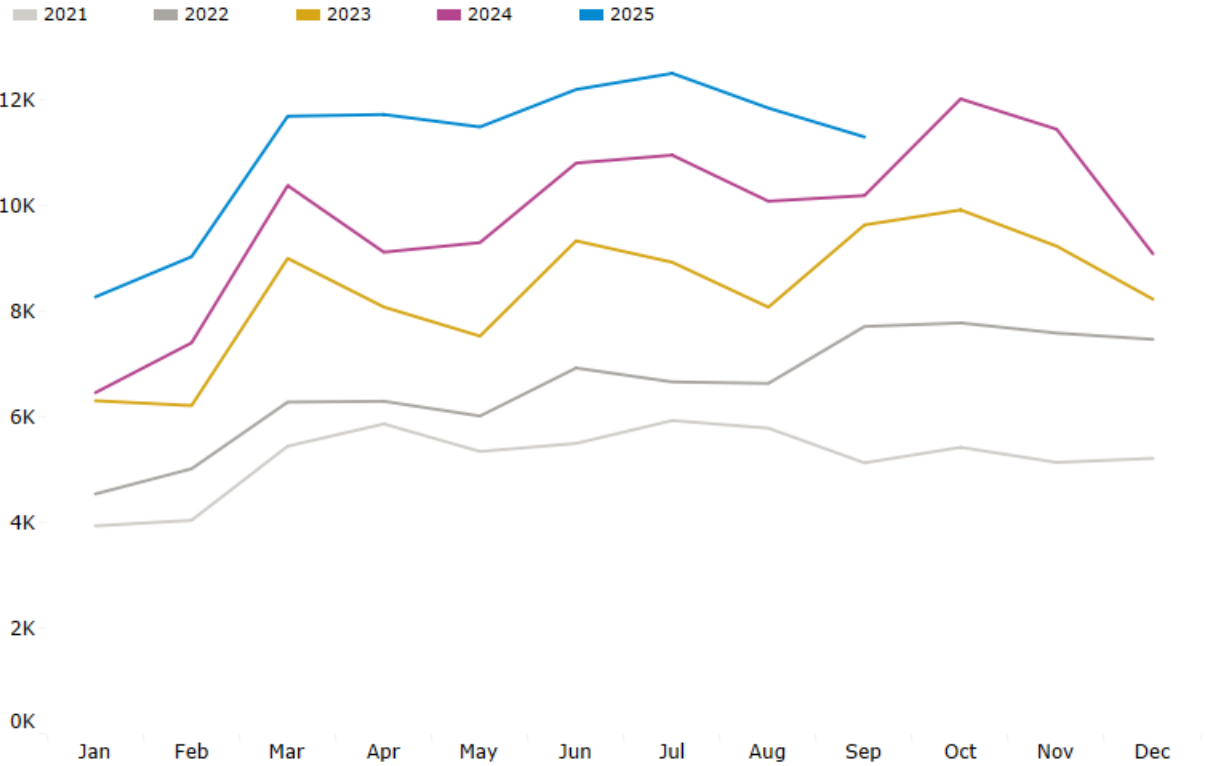
		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Jul	Columbus	63.4%	-7.5%	\$171	+12.6%	\$108	+4.1%
Aug	Columbus	59.3%	-4.7%	\$170	+14.7%	\$101	+9.3%
Sep	Columbus	57.6%	-8.5%	\$173	+13.3%	\$100	+3.6%

Calendar Year-to-Date Performance

Columbus All Properties					
Occupancy	ADR	RevPAR	Supply	Demand	Revenue
60.6%	\$164	\$100	164.8K	99.9K	\$16.4M
-3.4%	+13.6%	+9.7%	+22.3%	+18.1%	+34.2%

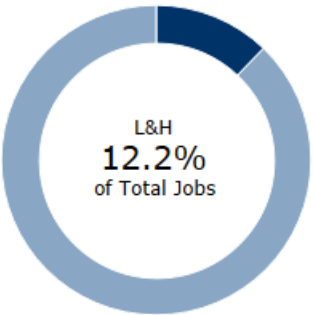
Short Term Rental Demand by Month

Last Five Calendar Years



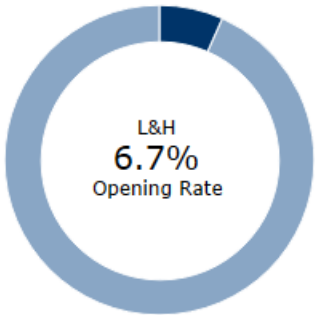
Total Leisure & Hospitality Jobs

L&H Jobs
as of September 2025
15.1K
+0.7% YOY | -0.7% vs. 2019

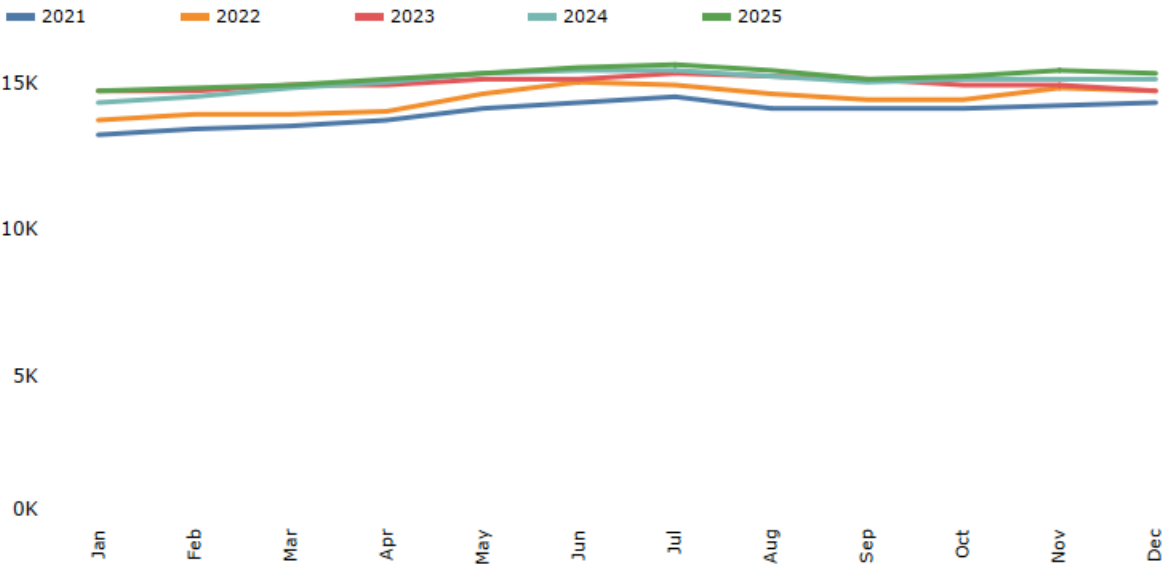


Leisure & Hospitality Job Openings

L&H Job Openings
as of September 2025
1.1K
+39.3% YOY | +24.8% vs. 2019



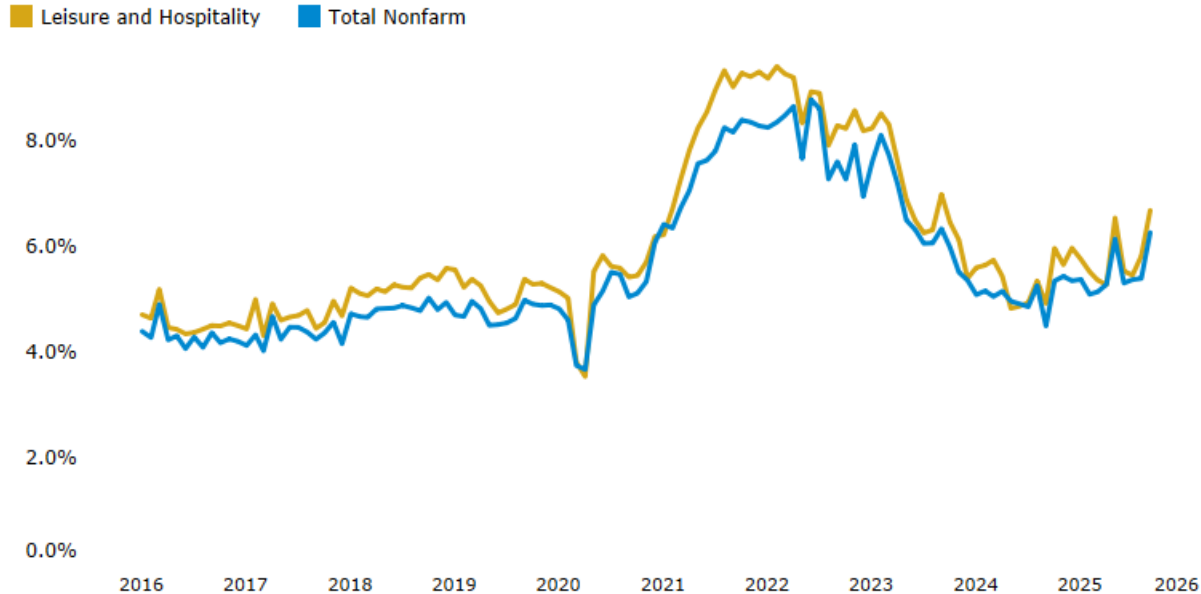
Employment Recovery
Leisure & Hospitality Jobs (Thousands)



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

September 2025 Volume

2.4M

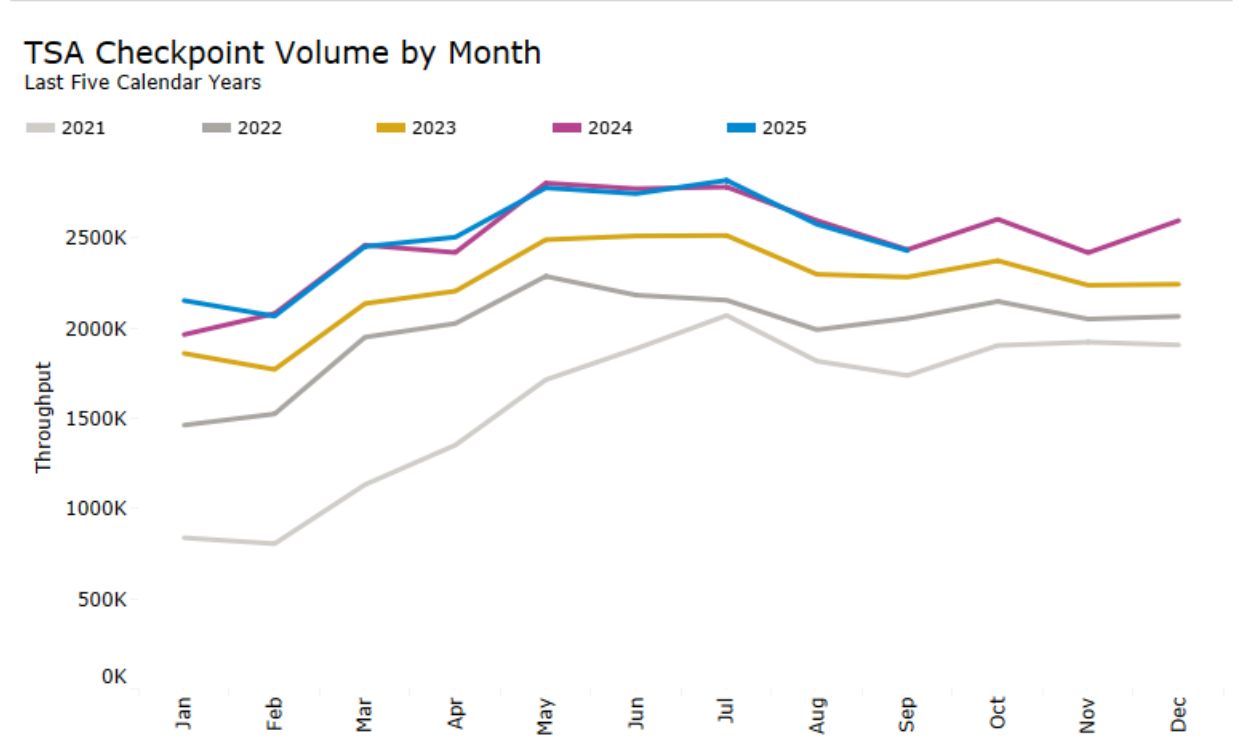
-0.2% YOY

Year-to-Date TSA Checkpoint Volume & Visitor Origins

Jan - Sep 2025 Volume

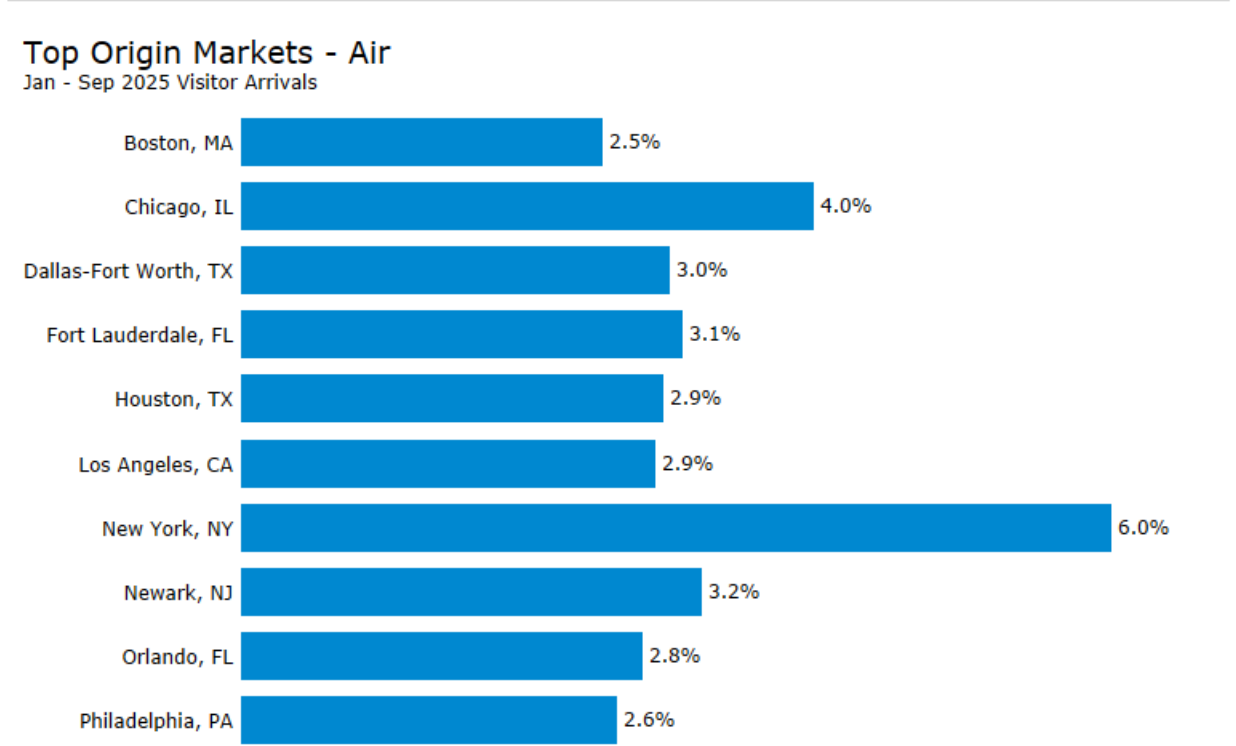
22.5M

+0.9% YOY



Source: Transportation Security Administration

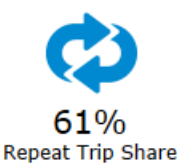
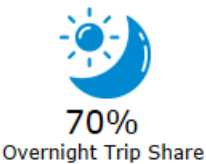
Source: Transportation Security Administration



Source: OAG

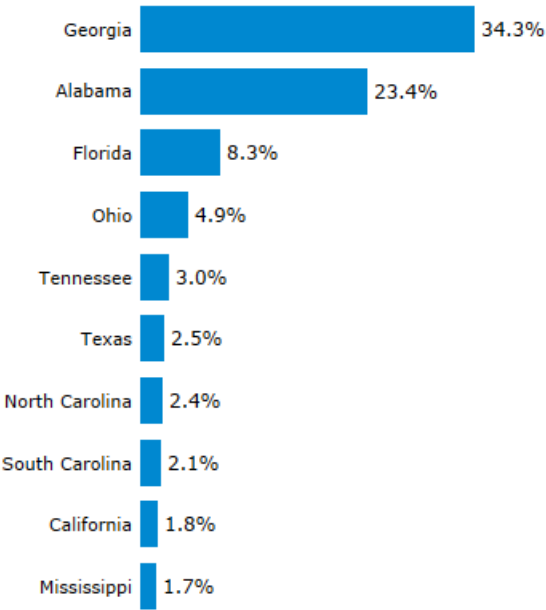


September 2025 Domestic Visits

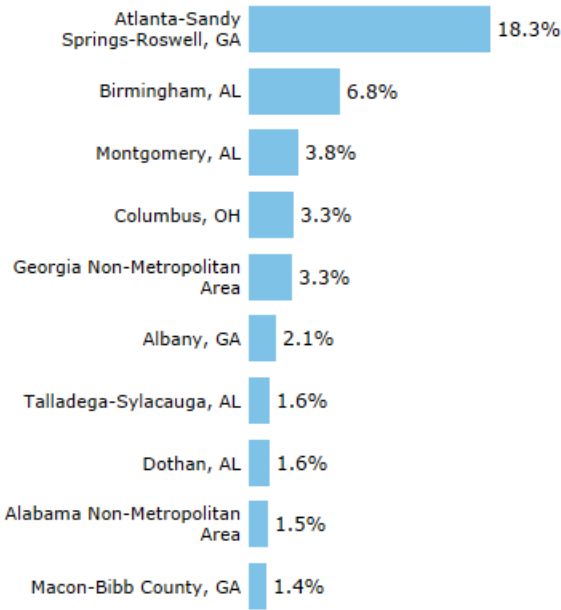


Top Origin Markets

States

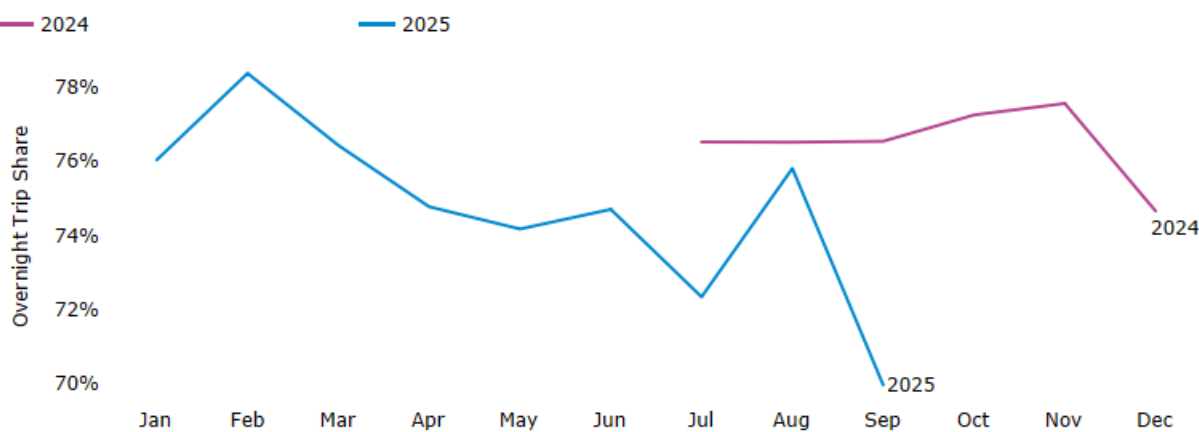


MSA

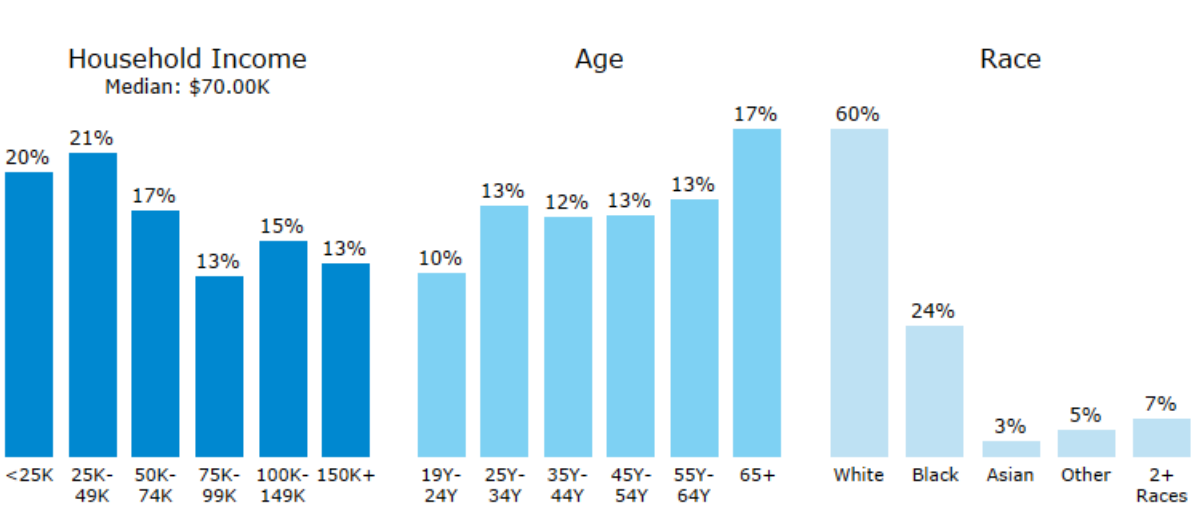


Domestic Visitor Trends & Characteristics

Overnight Trip Share by Month

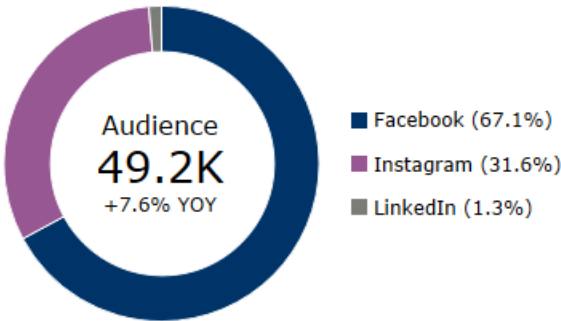


September 2025 Visitor Origin Demographics

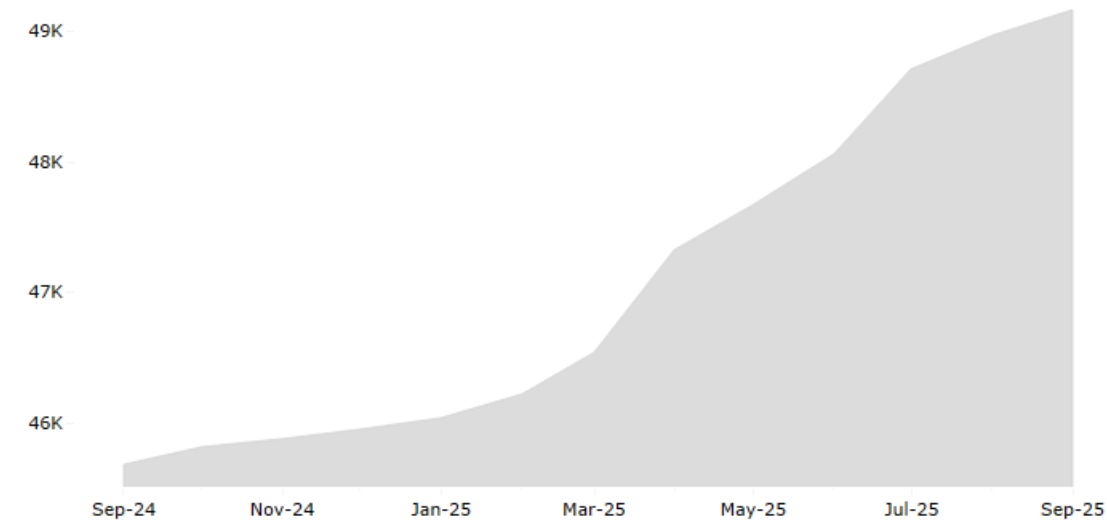




Audience Overview



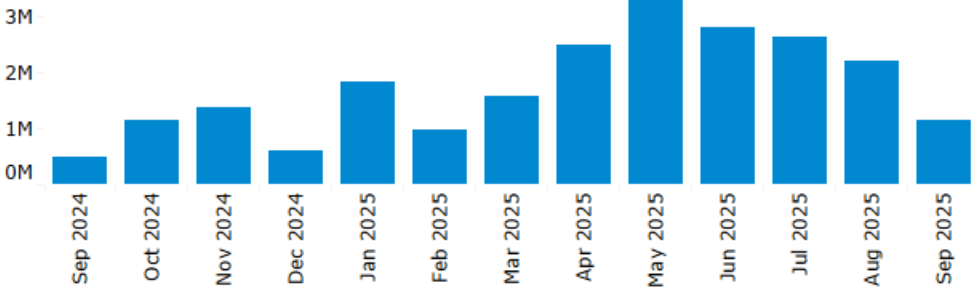
Audience by Month



Engagements & Impressions

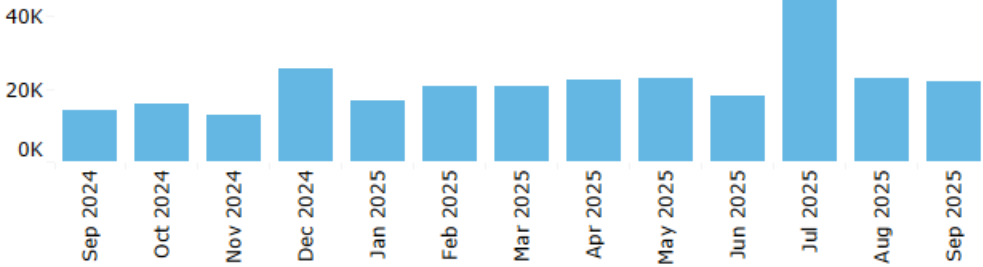
Impressions

September 2025
1.1M
+141.1% YOY



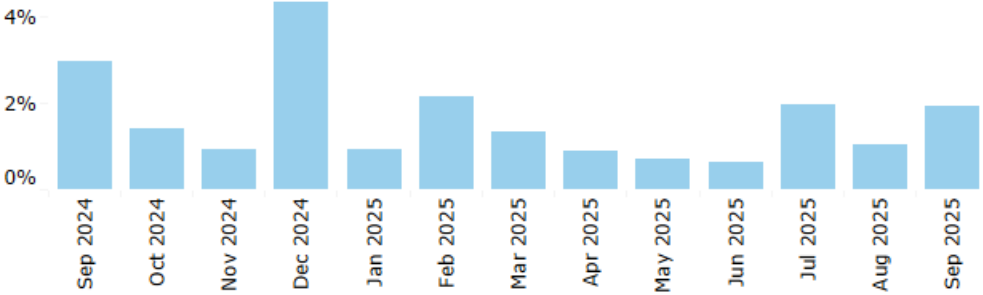
Engagements

September 2025
22.0K
+57.3% YOY



Engagement Rate

September 2025
1.9%
-1.0% pt YOY



Website Performance Summary

September 2025 | Properties: All



Users
30.2K
+26.3% YOY



Sessions
34.0K
+19.3% YOY



Engaged Sessions
13.7K
+1.0% YOY



Engagement Rate
40.4%
-7.29% pt YOY



Page Views
52.5K
+21.6% YOY



Pages Per Session
1.55 pages
+0.03 pages YOY

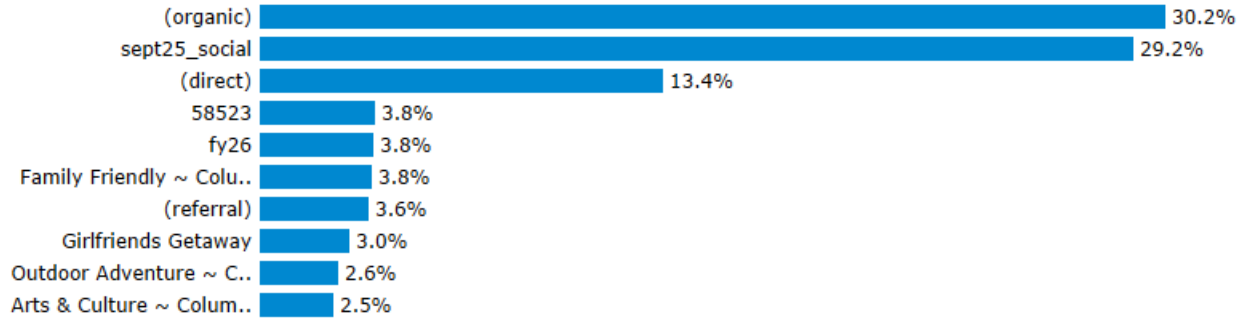


Avg. Session Duration
00:01:22
-22 sec YOY

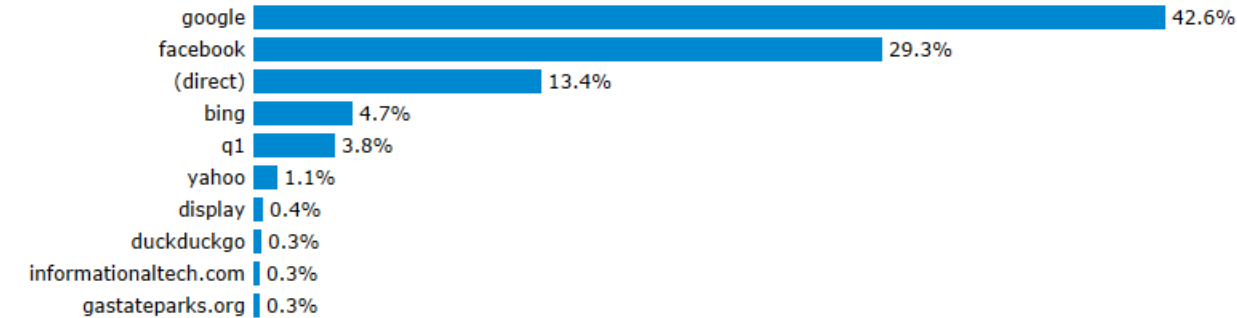


Bounce Rate
59.6%
+7.29% pt YOY

Campaigns

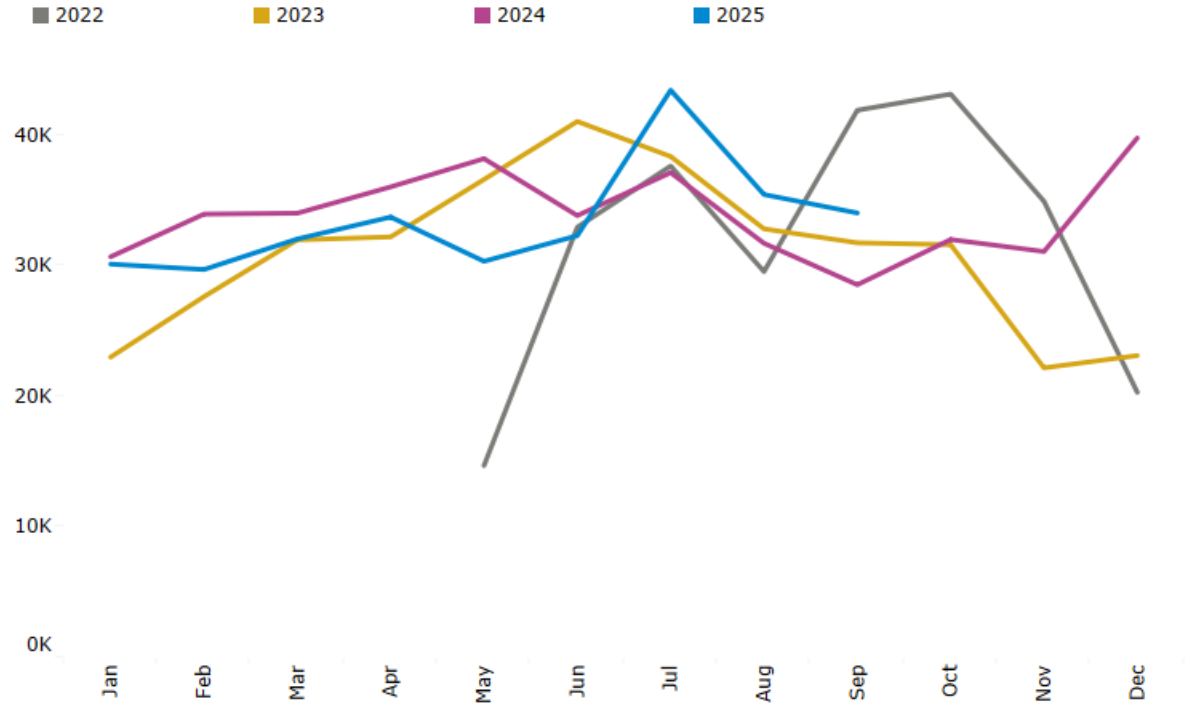


Sources



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

September 2025



Facebook



Audience
33.0K
+4.3% YOY

Engagement Rate	2.0%
Impressions	940,283
Video Views	1,617
Engagements	19,237
Comments	135
Reactions	1,335
Shares	126
Post Link Clicks	12,647
Other Post Clicks	4,994

Instagram



Audience
15.5K
+10.6% YOY

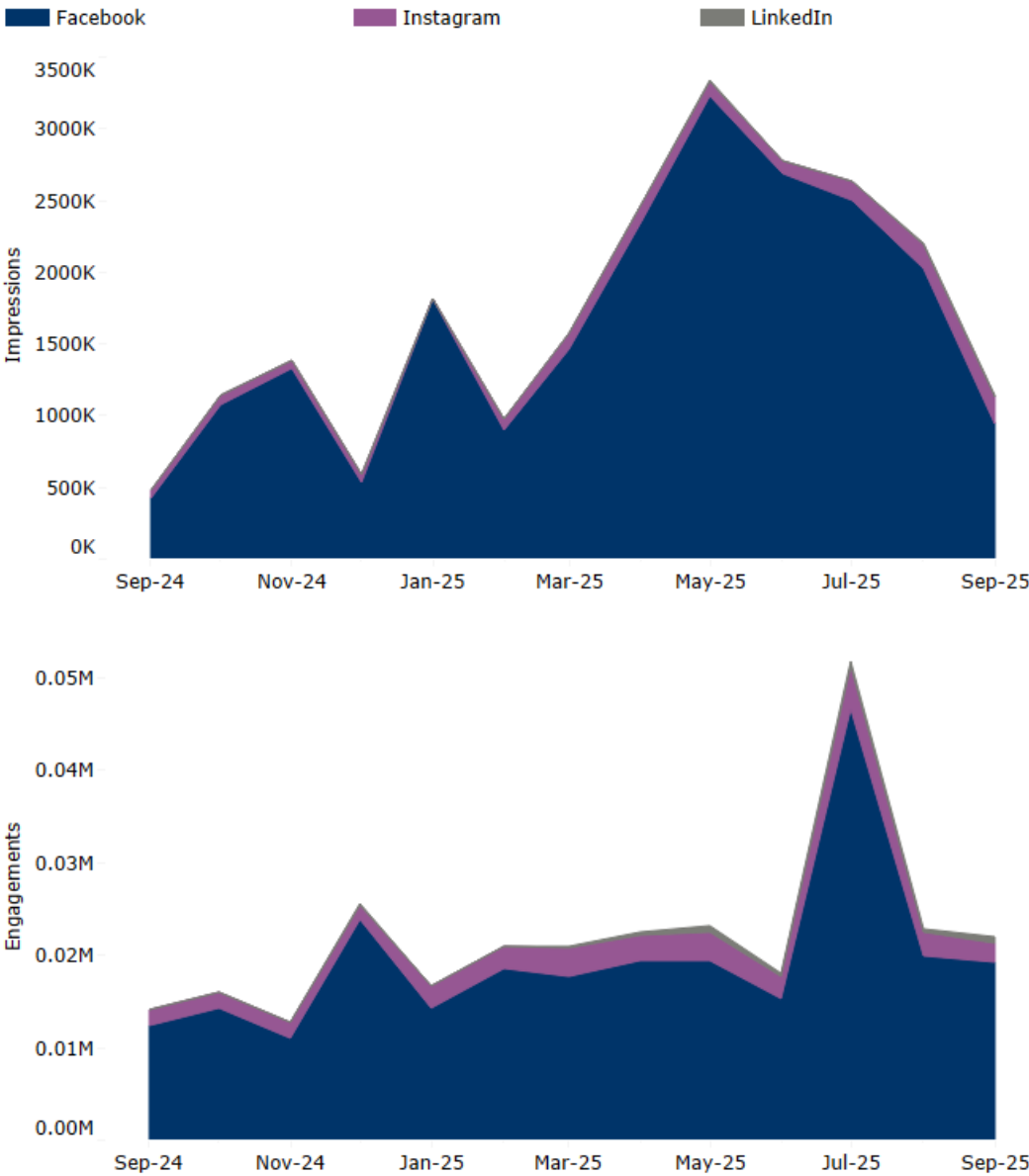
Engagement Rate	1.0%
Impressions	190,401
Video Views	6,588
Engagements	1,951
Comments	92
Reactions	1,636
Saves	
Shares	158

LinkedIn



Audience
630

Engagement Rate	13.6%
Impressions	5,996
Video Views	61
Engagements	813
Comments	26
Reactions	308
Shares	6
Post Link Clicks	

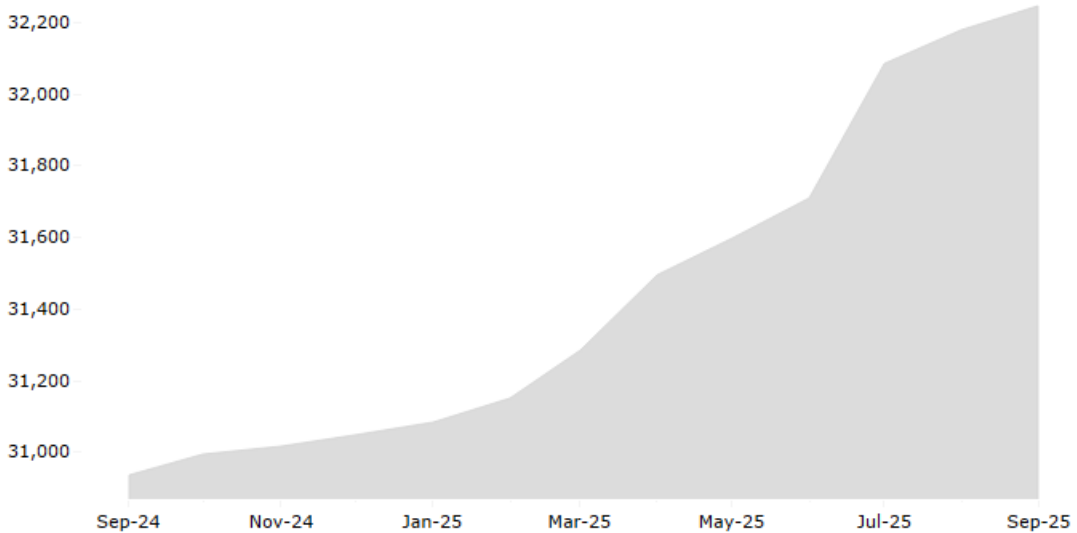




Audience Overview

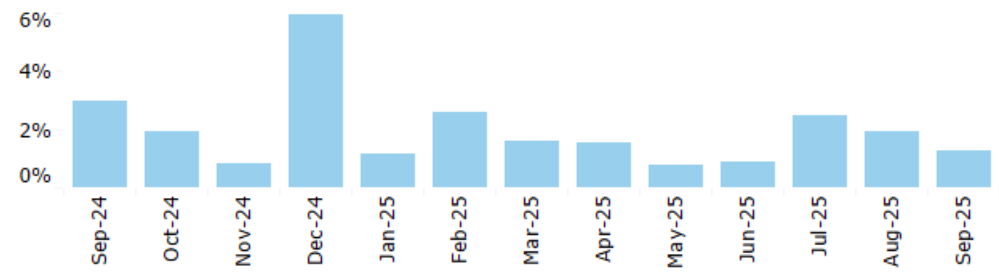
Audience
September 2025
32.2K
+4.2% YOY

Audience by Month

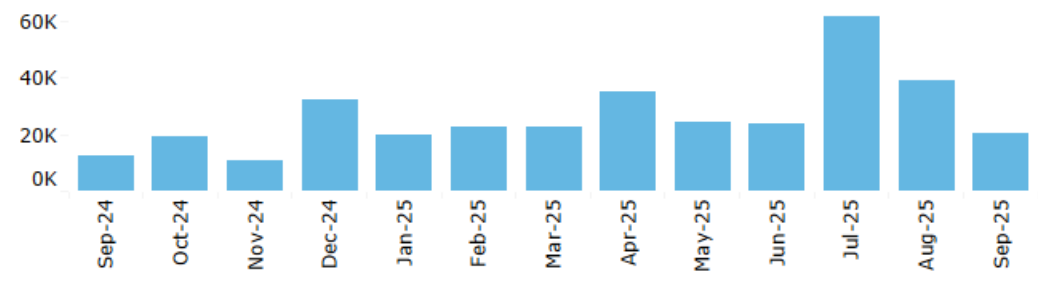


Engagements & Impressions

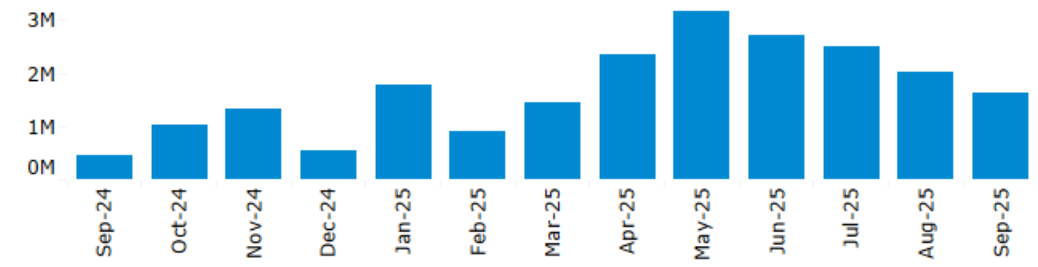
Engagement
Rate
September 2025
1.2%
-1.7% pt YOY



Engagements
September 2025
20.2K
+61.2% YOY



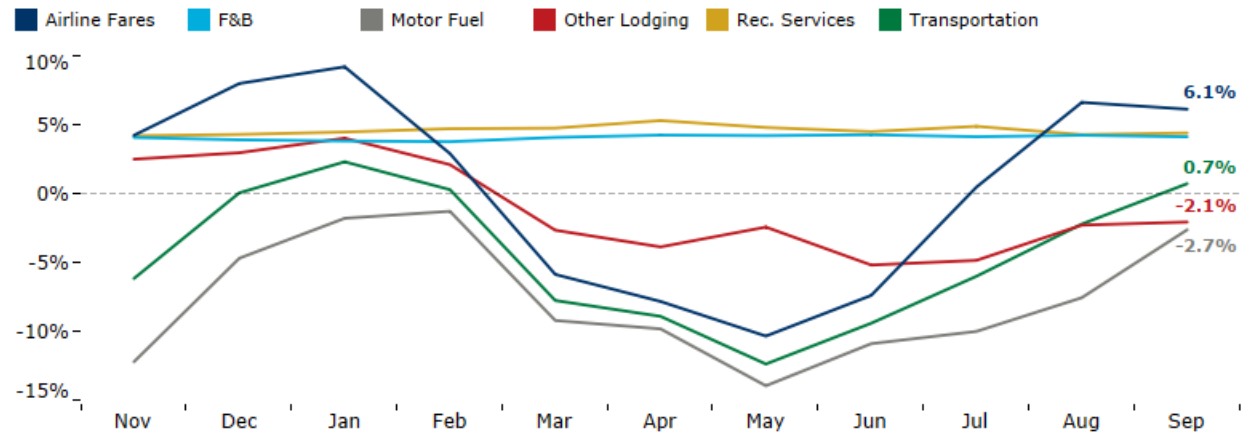
Total
Impressions
September 2025
1.6M
+273.8% YOY





Travel Price Index

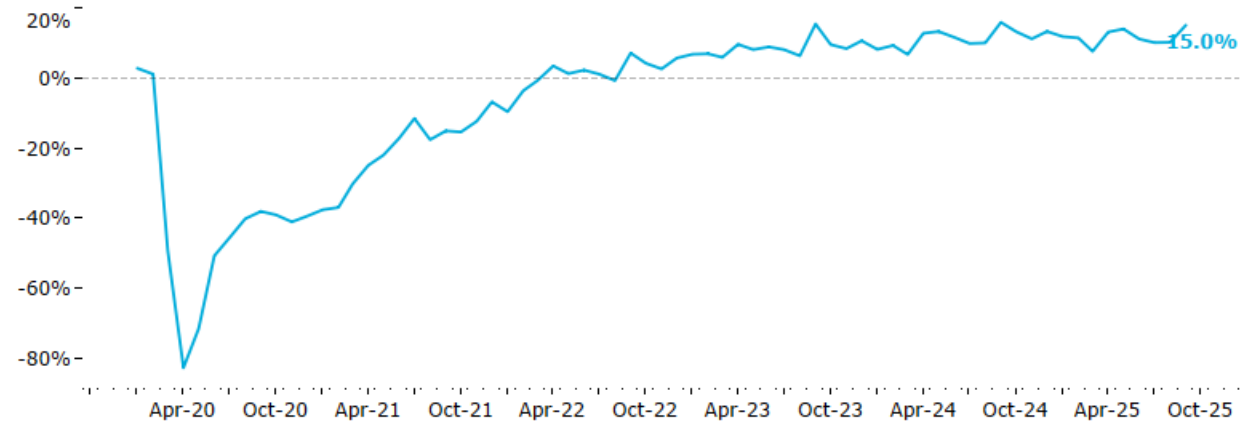
% Change Relative to Same Month in Previous Year | Last 12 Months



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

Travel Spending (% change vs 2019)

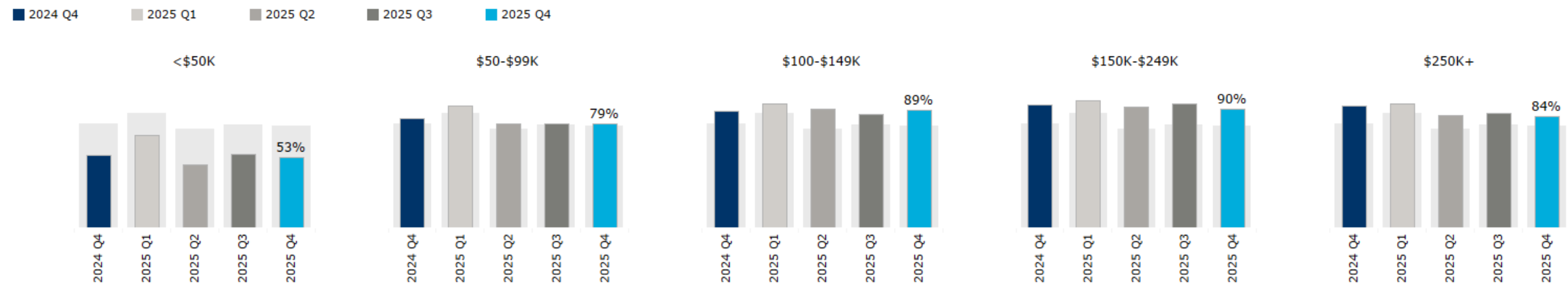
% Change vs. 2019 | U.S. total



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)

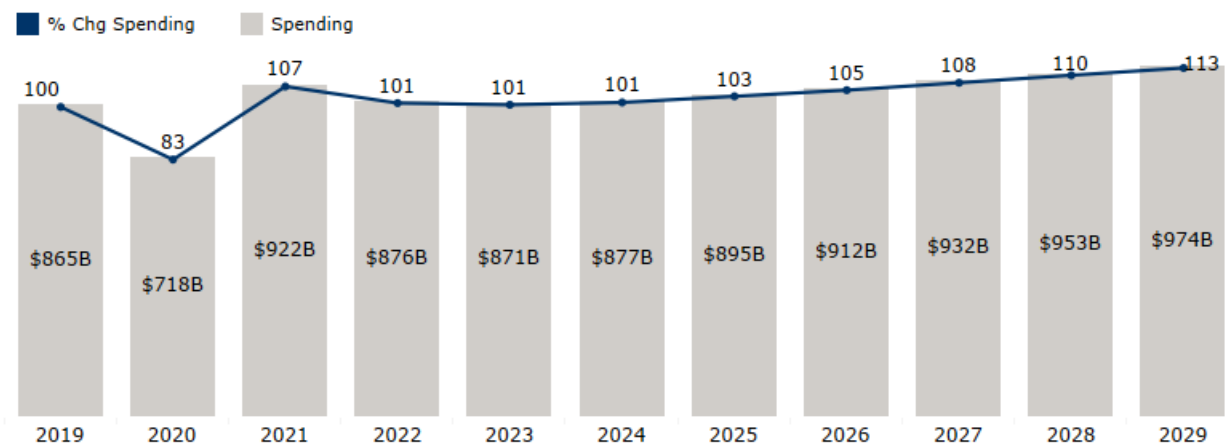


Note: Light gray bars represent the average for all survey respondents
Source: MMGY Global's Portrait of American Travelers

Domestic Travel Forecast

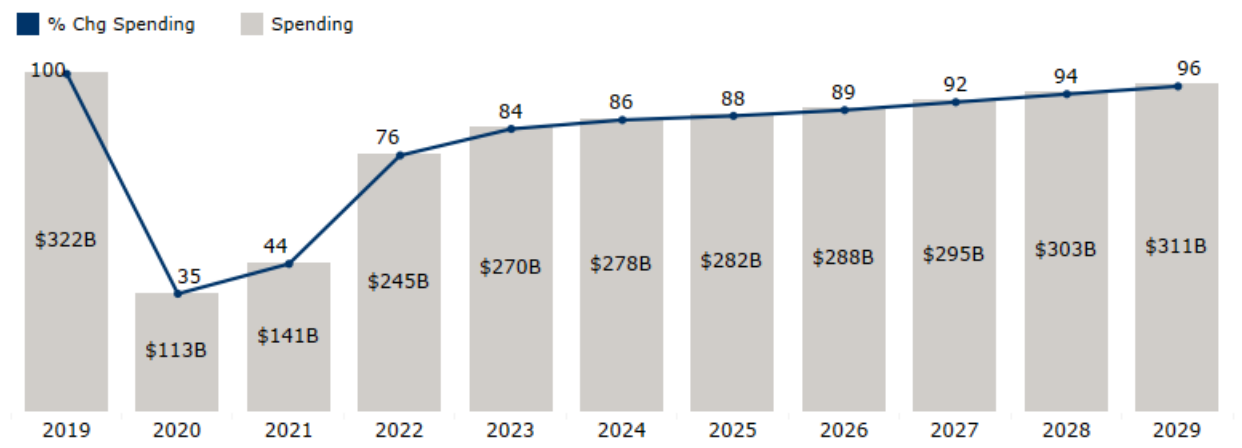
Real Domestic Leisure Travel Spending

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



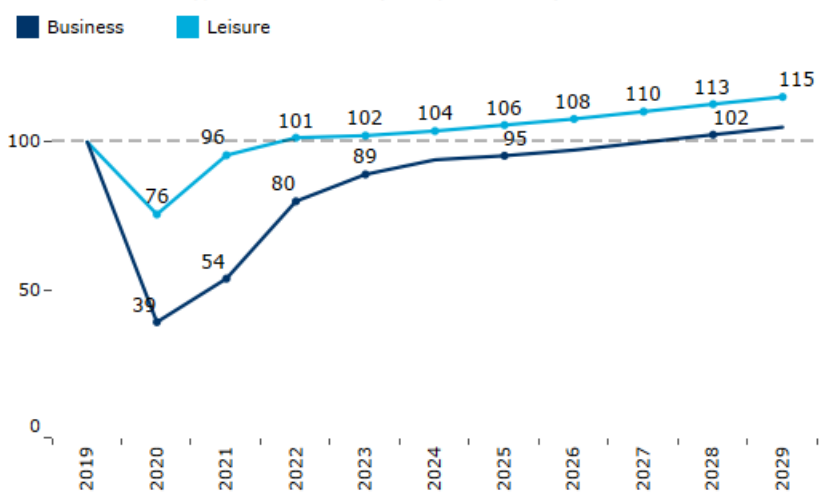
Real Domestic Business Travel Spending

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



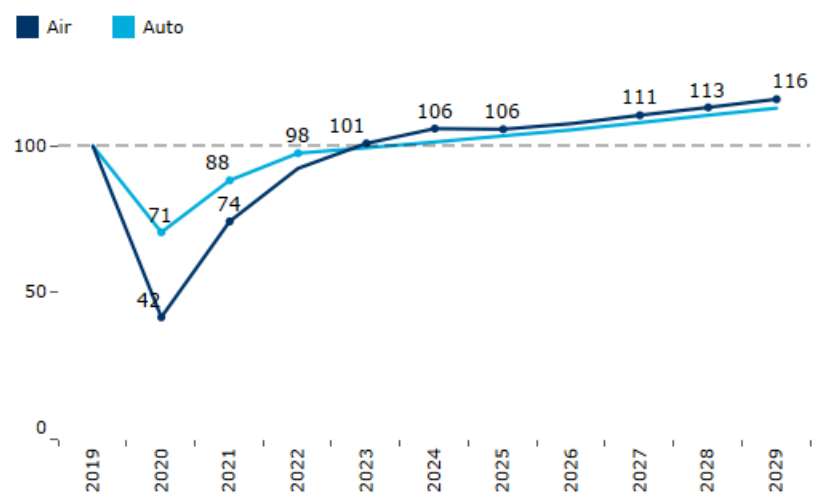
Leisure vs. Business Travel Volume

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



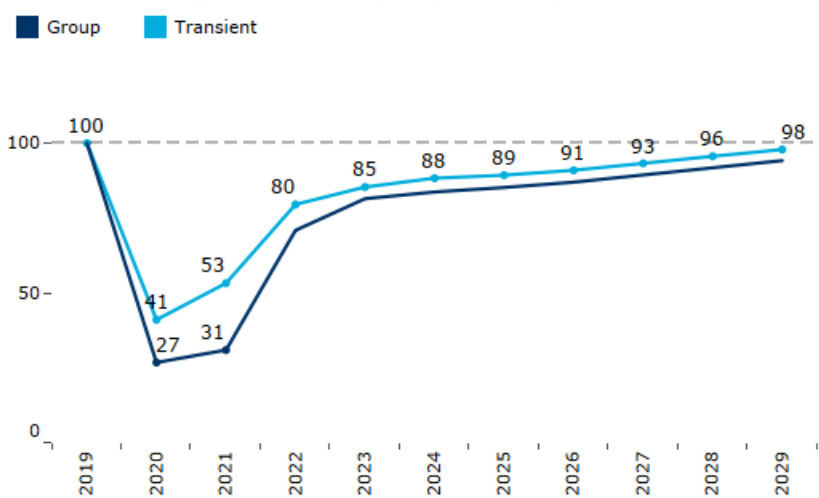
Auto vs. Air Travel Volume

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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