



Monthly Summary Report

September 2025

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



ATL Checkpoint Volume
2.4M
-0.2% YOY

Source: TSA



Website Sessions
34.0K
+19.3% YOY

Source: Google Analytics



Hotel ADR
\$101.73
-1.6% YOY

Source: STR



Social Media Audience
49.2K
+7.6% YOY

Source: Sprout Social



Facebook Audience
32.2K
+4.2% YOY

Source: Meta



Overnight Trip Share
70%

Source: Azira



L&H Jobs
15.1K
+0.7% YOY

Source: Bureau of Labor Statistics

Lodging Summary

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



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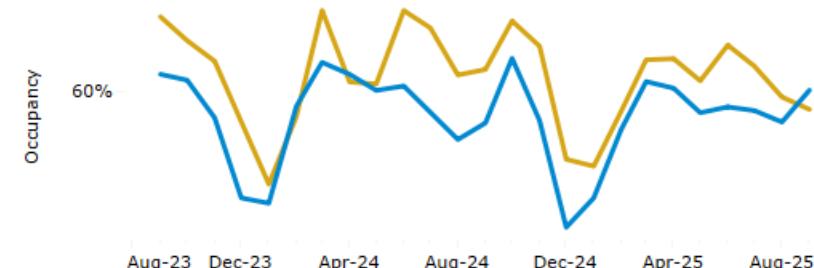
Aggregate Lodging Performance

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 |

Occupancy by Month

Hotels Short Term Vacation Rentals



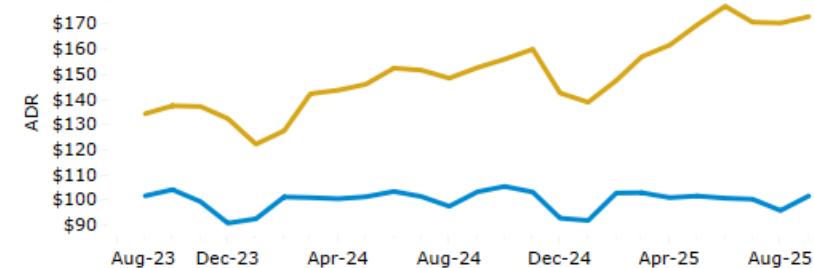
Hotel Performance

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 |

ADR by Month

Hotels Short Term Vacation Rentals



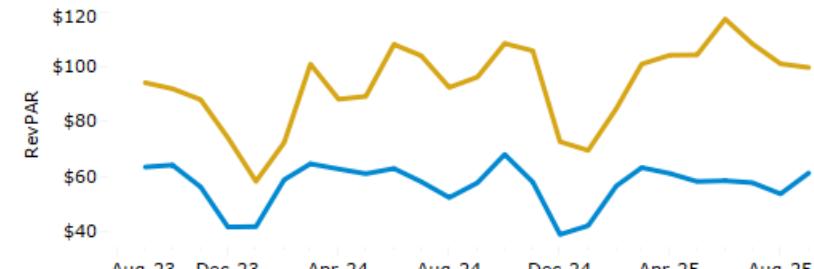
Short Term Vacation Rental Performance

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 |

RevPAR by Month

Hotels Short Term Vacation Rentals



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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

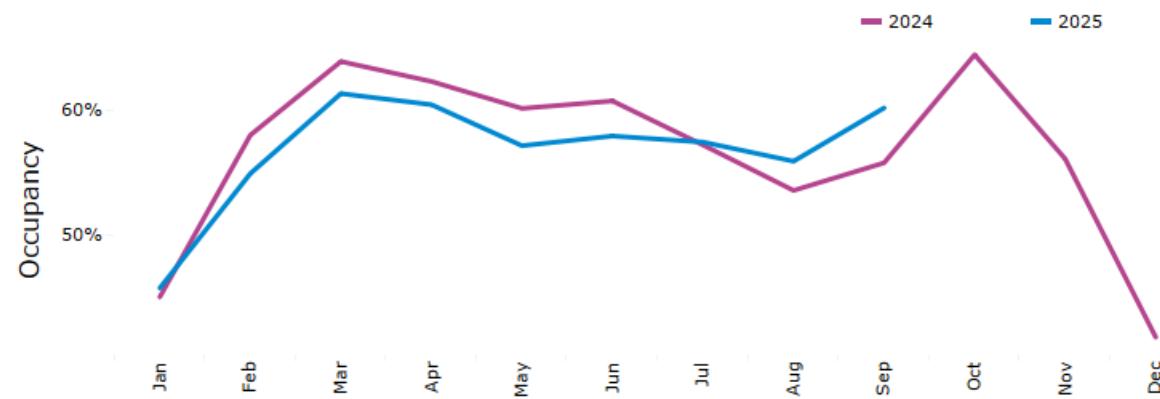
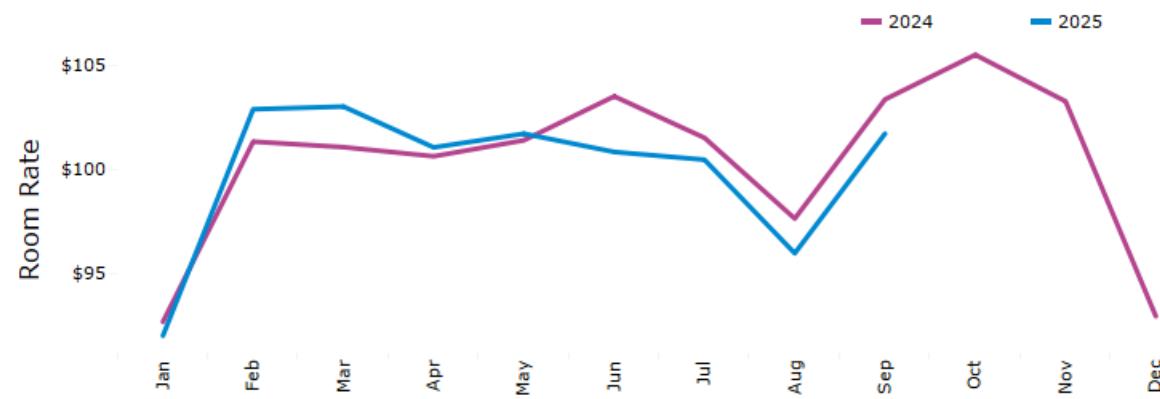
| | | | | | | |
|---------------------|-------|-------|-------|-------|------|-------|
| Muscogee County, GA | 60.2% | +7.9% | \$102 | -1.6% | \$61 | +6.2% |
|---------------------|-------|-------|-------|-------|------|-------|

| | | | | | | |
|--------------------|-------|--------|-------|-------|------|-------|
| Russell County, AL | 51.5% | +12.7% | \$106 | -6.1% | \$54 | +5.9% |
|--------------------|-------|--------|-------|-------|------|-------|

Calendar Year-to-Date Performance

Muscogee County, GA

| | | | | | | | | | | | |
|-----------|--------------|-----|--------------|--------|-------------|--------|-------------|--------|---------------|---------|----------------|
| Occupancy | 56.8% | ADR | \$100 | RevPAR | \$57 | Supply | 1.3M | Demand | 763.5K | Revenue | \$76.5M |
| | -1.0% | | -0.4% | | -1.4% | | +4.1% | | +3.1% | | +2.6% |



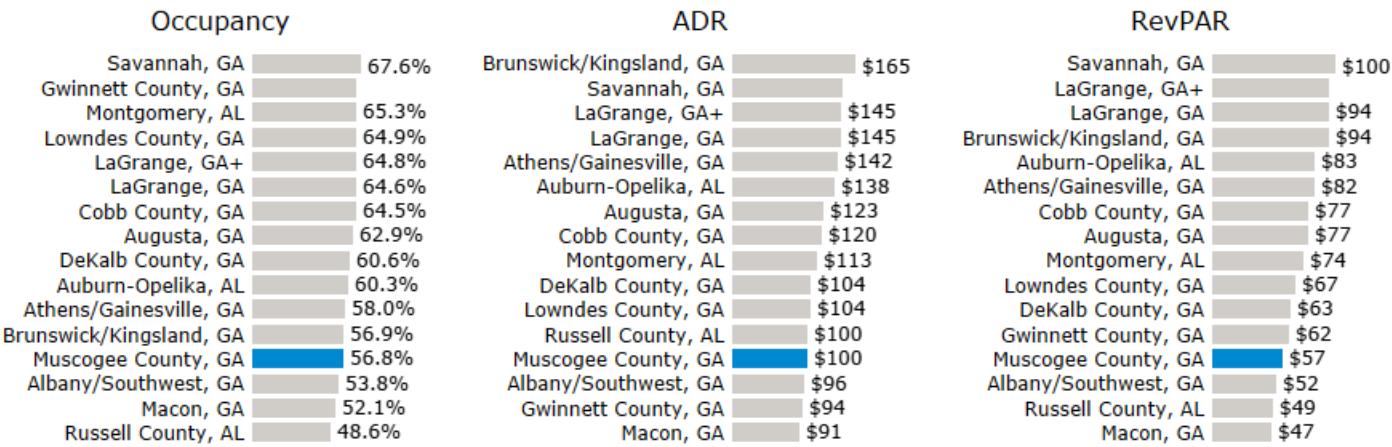
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Monthly Performance by Market

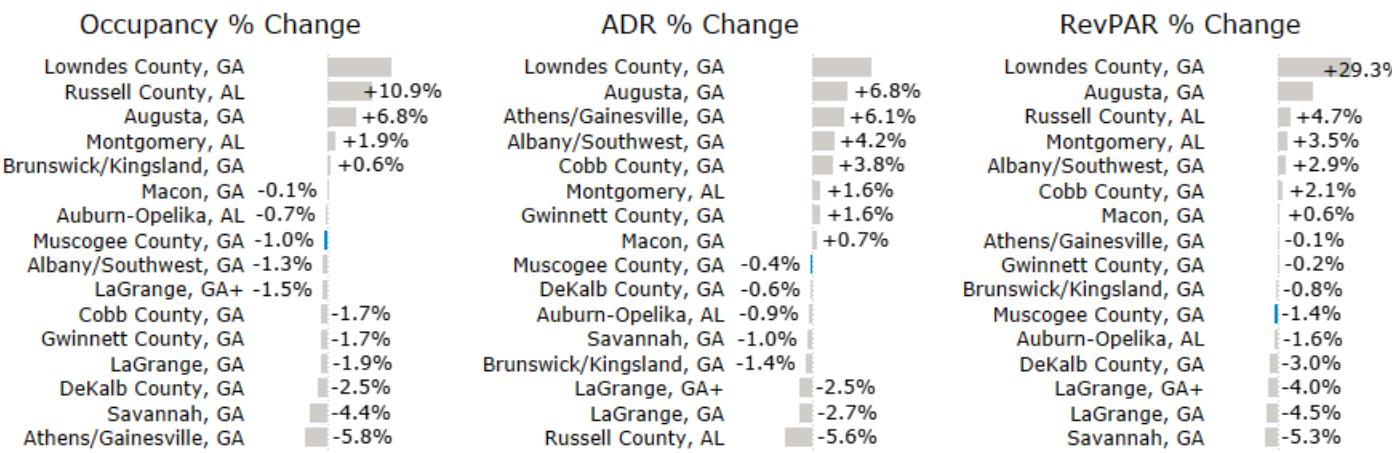
| | OCC | % CHG | ADR | % CHG | RevPAR | % CHG | |
|-----|-------------------------|-------|---------------------|-------|---------------------|-------|---------------------|
| Jul | Muscogee County, GA | 57.5% | +0.4% | \$100 | -1.0% | \$58 | -0.6% |
| | Albany/Southwest, GA | 52.9% | +0.5% | \$95 | +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% |
| Aug | 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% |
| | 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% |
| Sep | 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% |
| | 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% |
| Oct | 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



% Change vs. Previous Year





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% |
|----------|-------|-------|-------|--------|-------|-------|

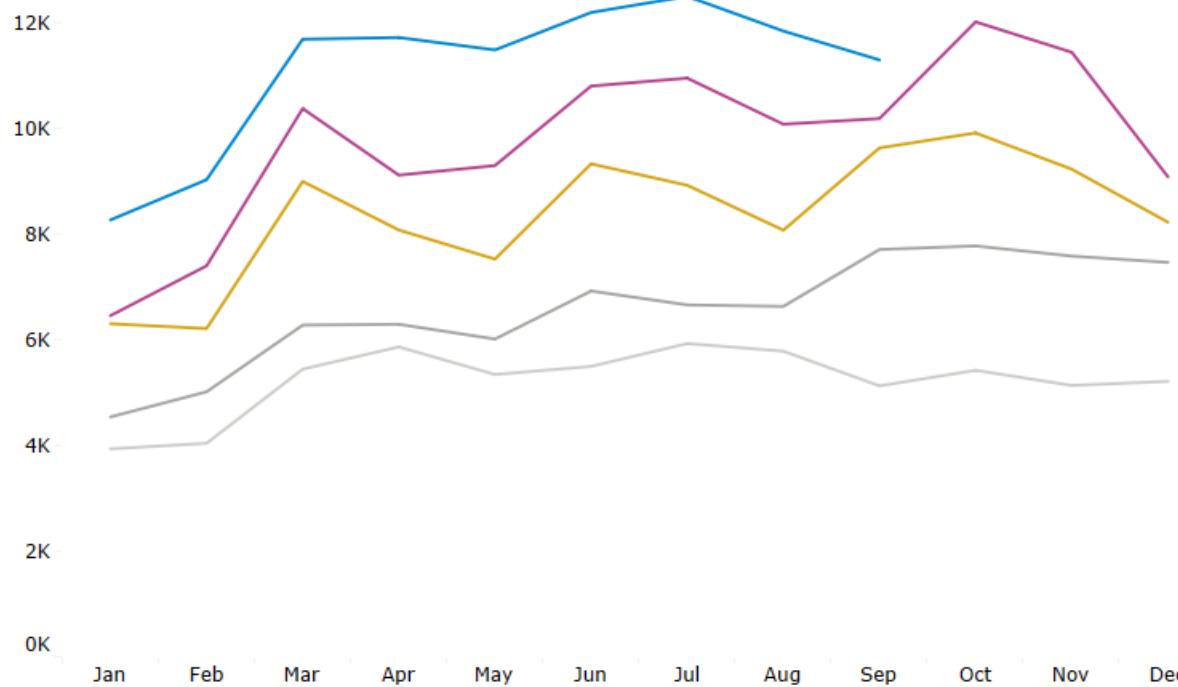
Calendar Year-to-Date Performance

Columbus
All Properties

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

Short Term Rental Demand by Month

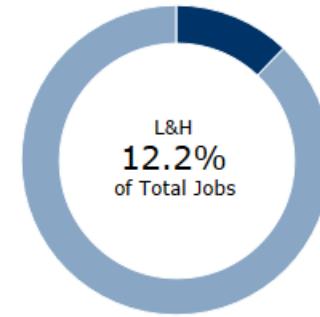
Last Five Calendar Years

 2021
 2022
 2023
 2024
 2025




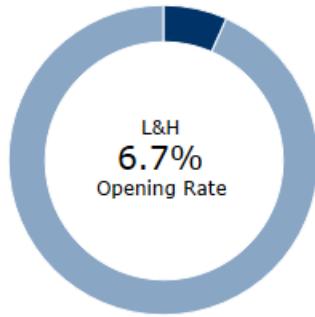
Total Leisure & Hospitality Jobs

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



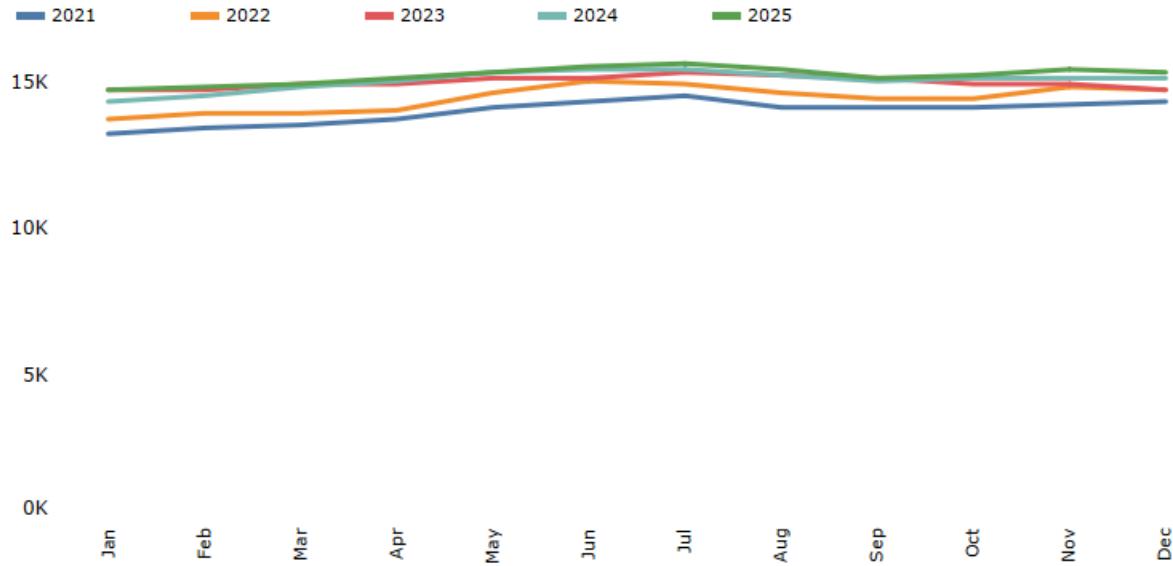
Leisure & Hospitality Job Openings

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



Employment Recovery

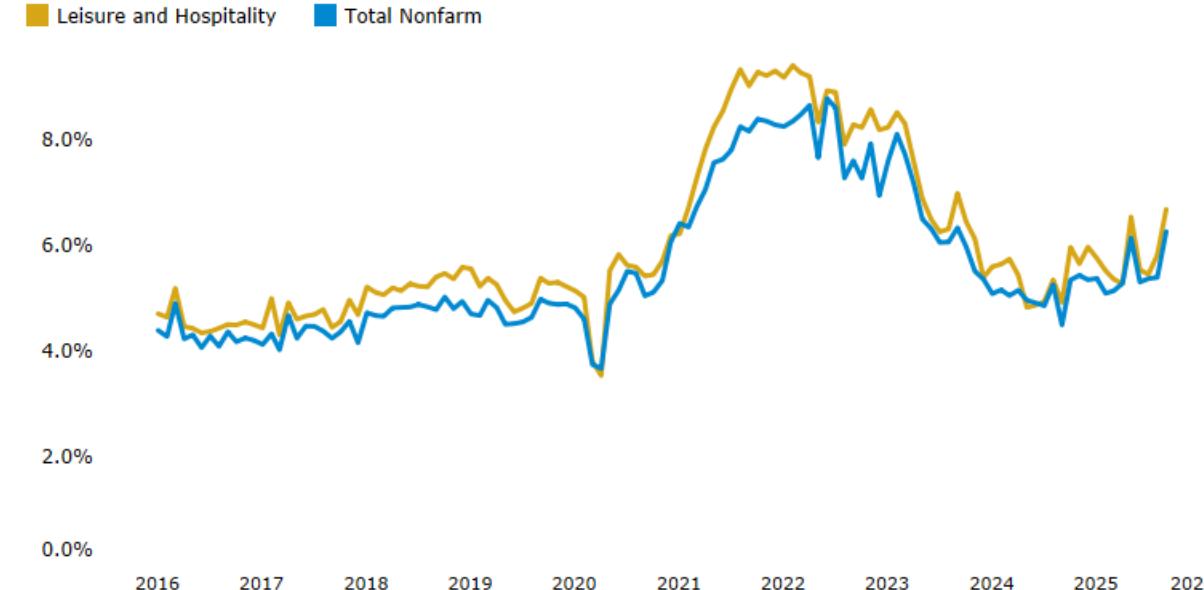
Leisure & Hospitality Jobs (Thousands)



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



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Monthly TSA Checkpoint Volume

September 2025 Volume

2.4M

-0.2% YOY

Year-to-Date TSA Checkpoint Volume & Visitor Origins

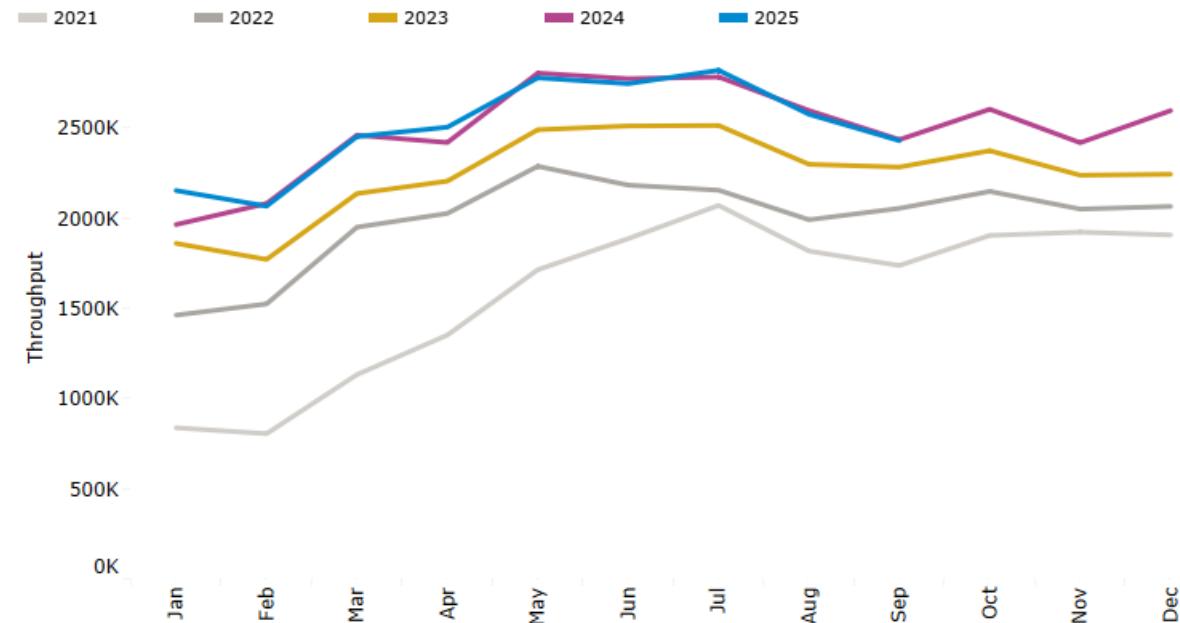
Jan - Sep 2025 Volume

22.5M

+0.9% YOY

TSA Checkpoint Volume by Month

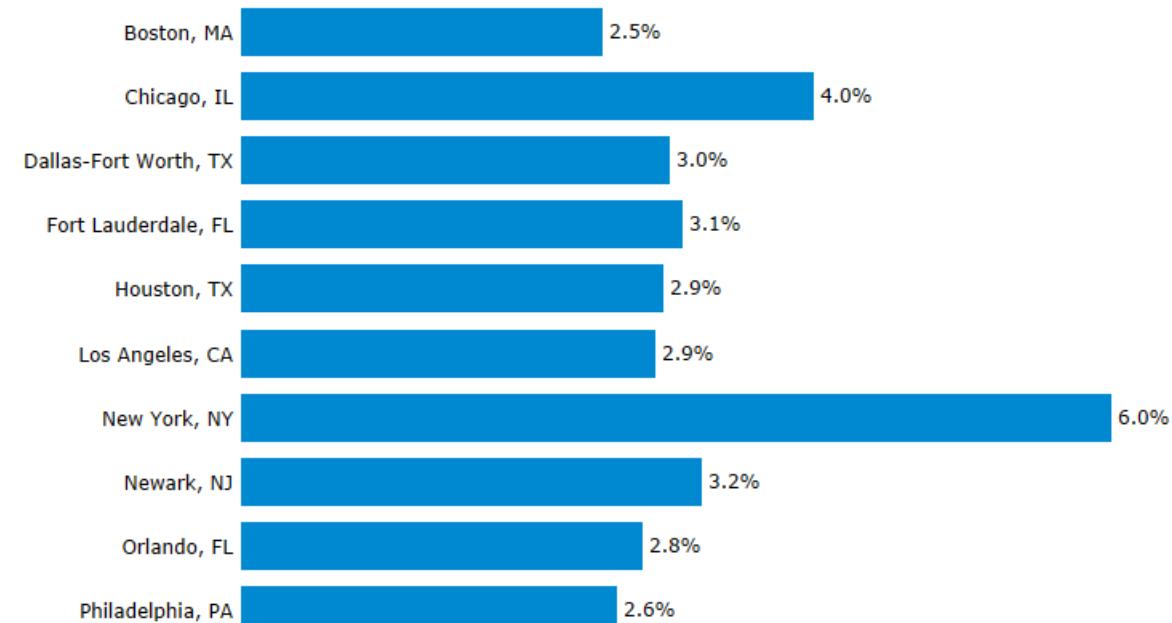
Last Five Calendar Years



Source: Transportation Security Administration

Top Origin Markets - Air

Jan - Sep 2025 Visitor Arrivals



Source: OAG

Source: Transportation Security Administration

Powered by Symphony | Tourism Economics



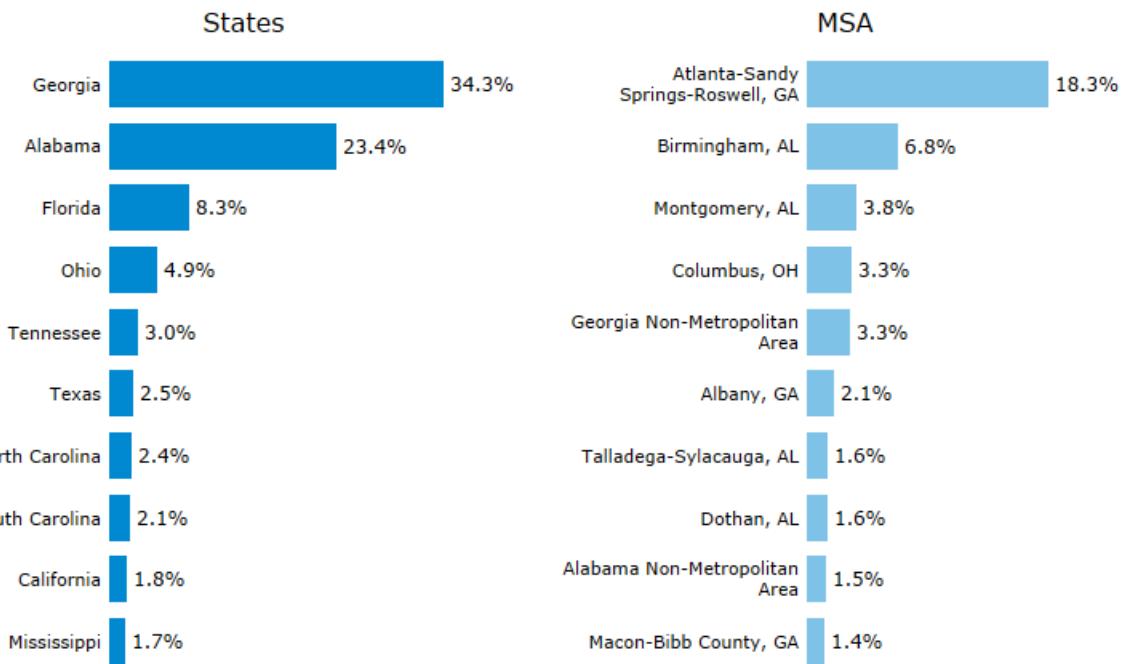
September 2025 Domestic Visits


1.7 days
Avg. Length of Stay


70%
Overnight Trip Share

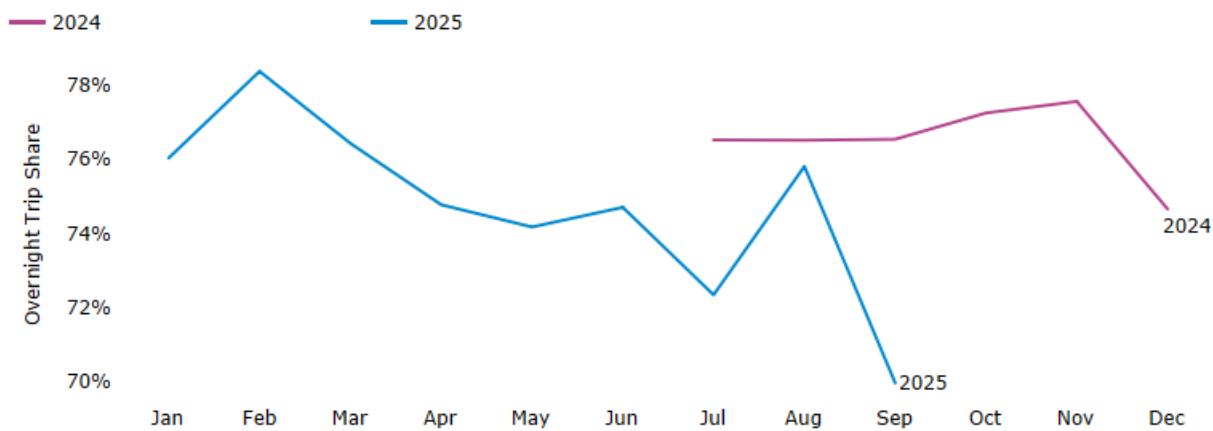

61%
Repeat Trip Share

Top Origin Markets



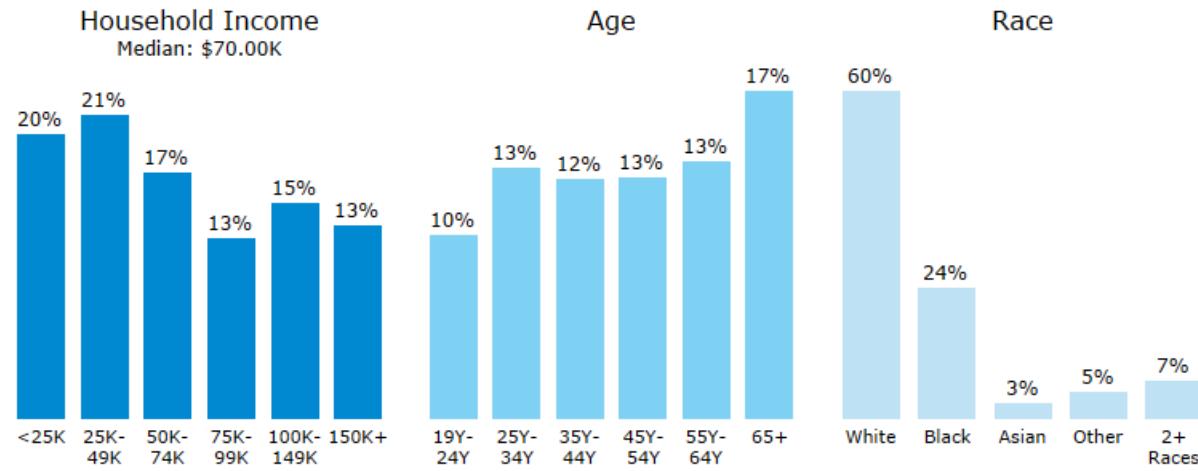
Domestic Visitor Trends & Characteristics

Overnight Trip Share by Month



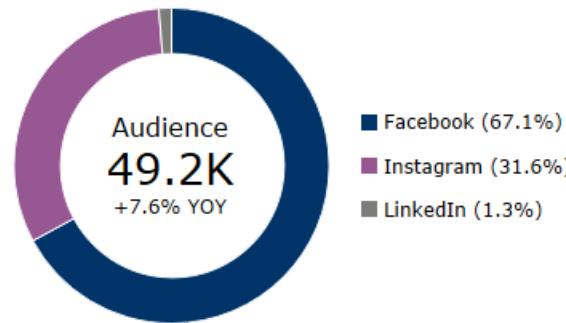
September 2025 Visitor Origin Demographics

Share of Total

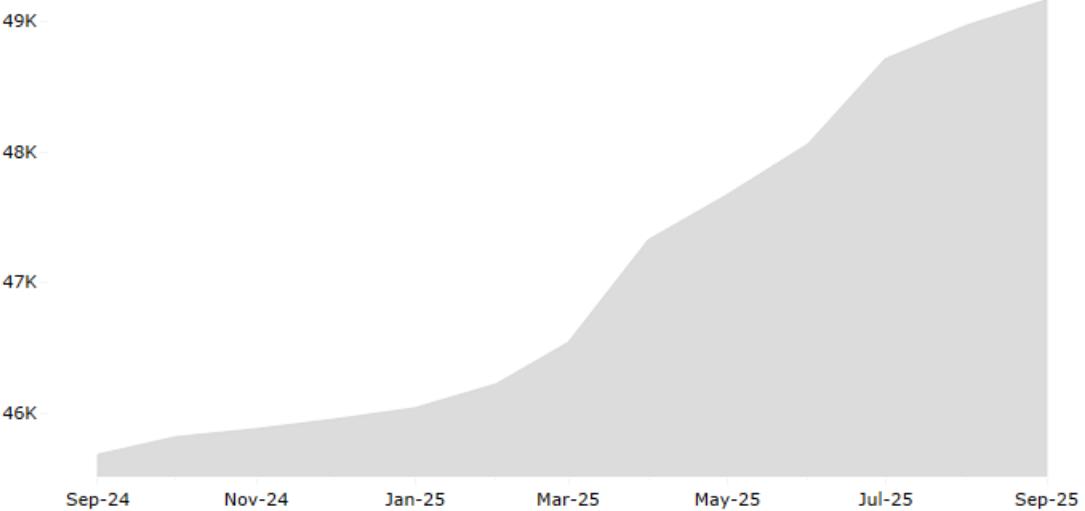


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Audience Overview



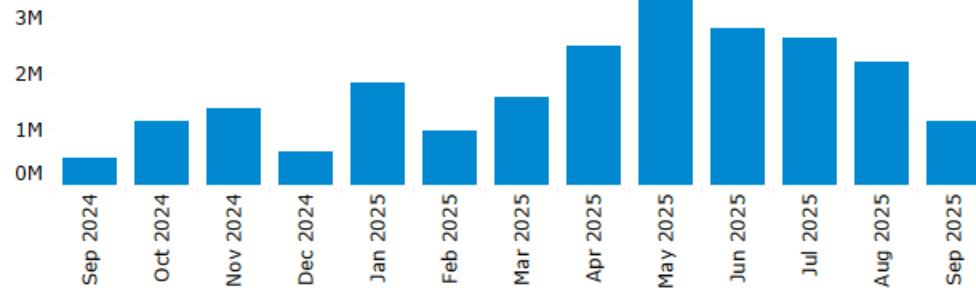
Audience by Month



Engagements & Impressions

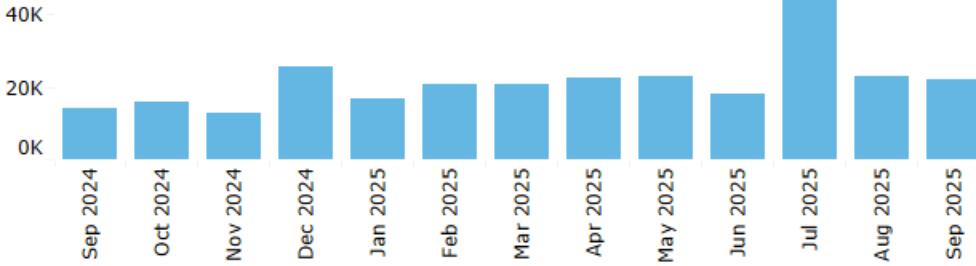
Impressions

September 2025
1.1M
+141.1% YOY



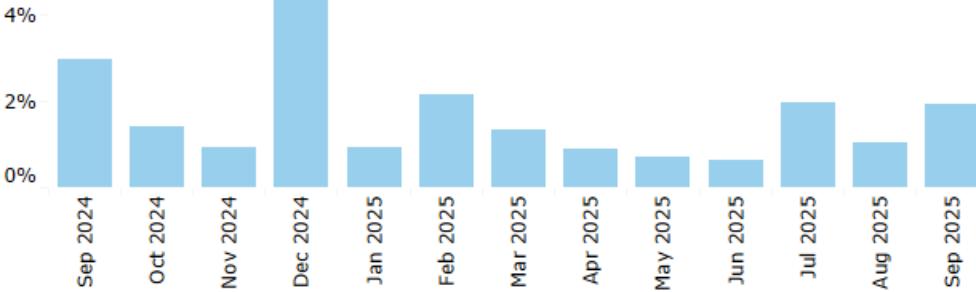
Engagements

September 2025
22.0K
+57.3% YOY



Engagement Rate

September 2025
1.9%
-1.0% pt YOY



Website Performance Summary

September 2025 | Properties: All



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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

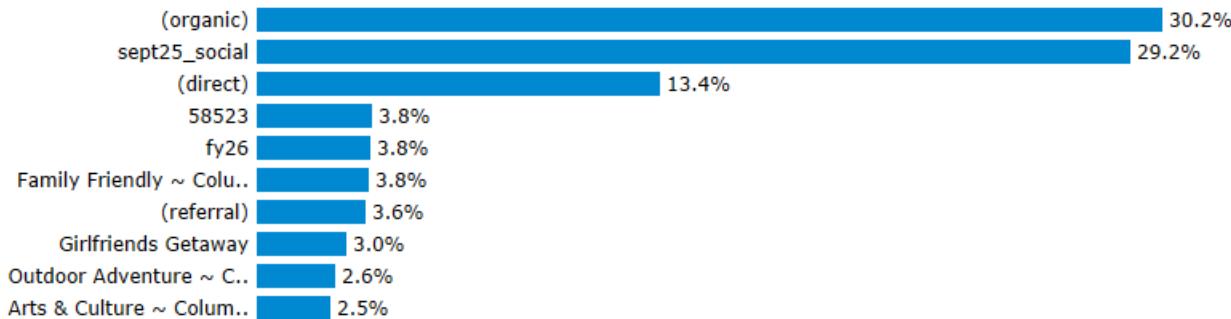


Avg. Session Duration
00:01:22
-22 sec YOY

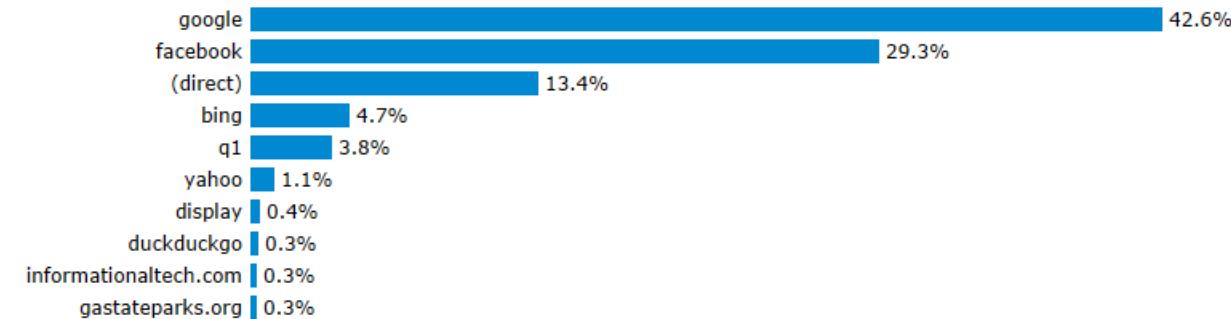


Bounce Rate
59.6%
+7.29% pt YOY

Campaigns

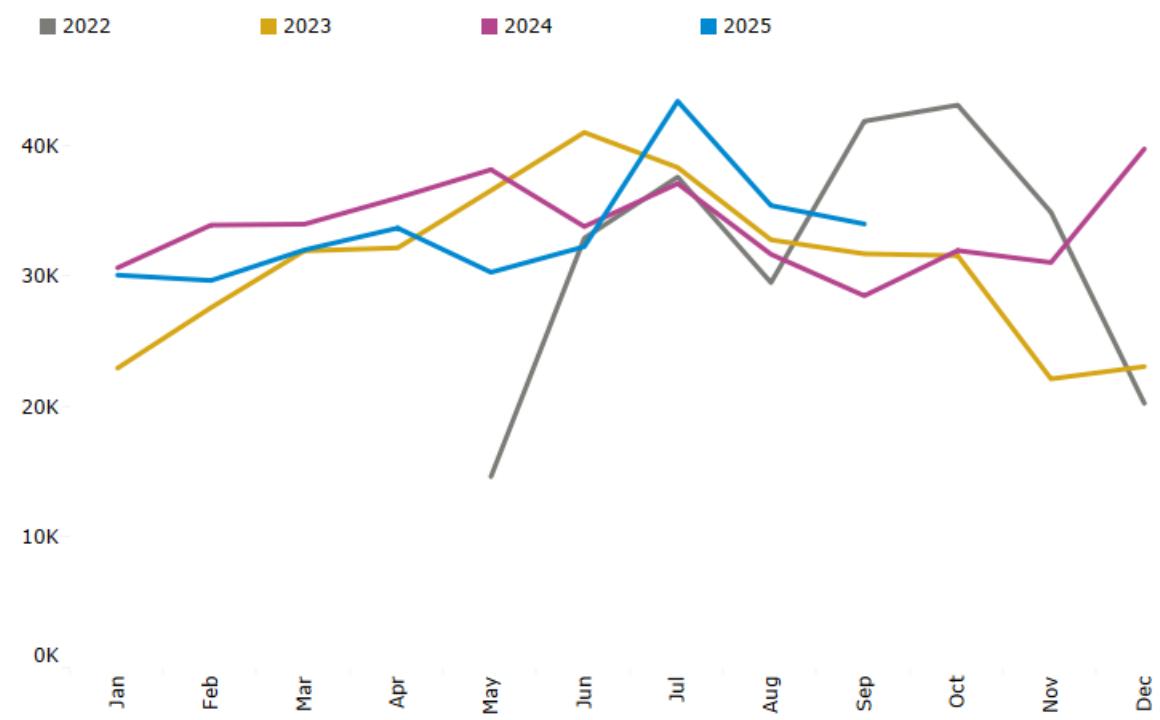


Sources



Sessions Analysis

Monthly Trend



Social Media Performance by Platform

September 2025



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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



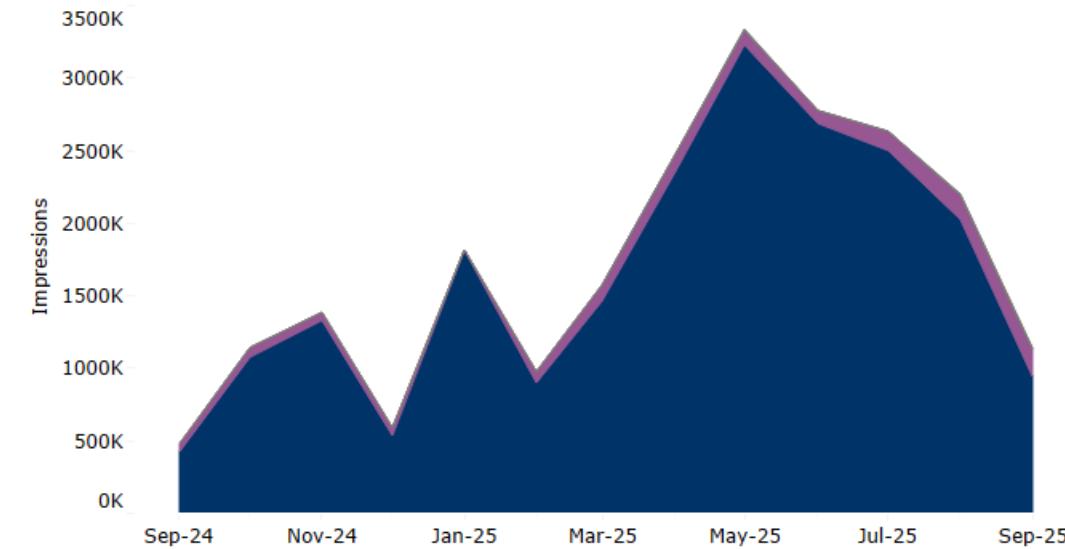
Audience
630

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

Facebook

Instagram

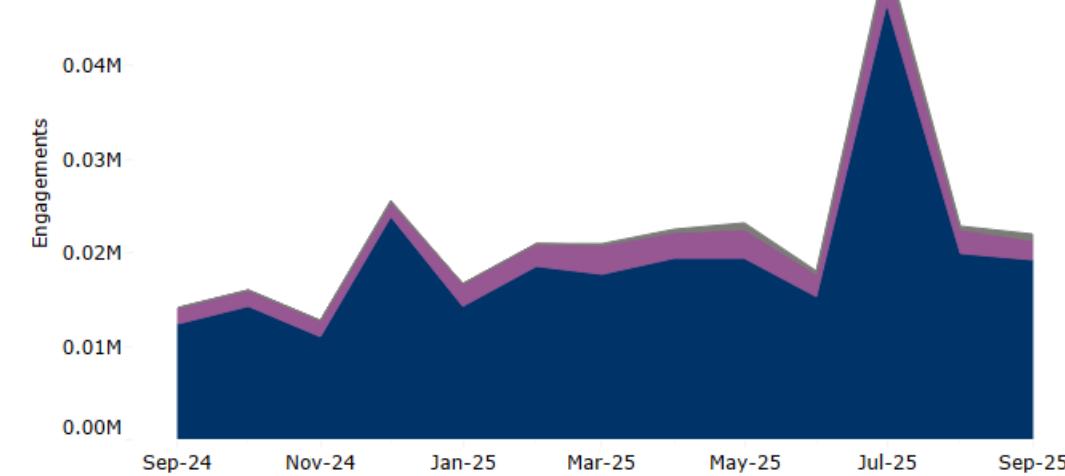
LinkedIn



Facebook

Instagram

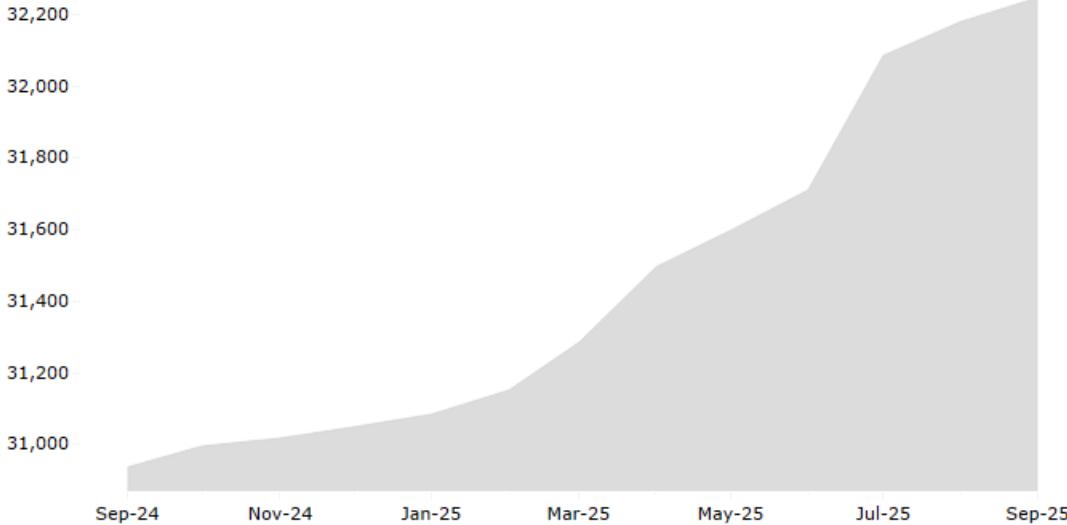
LinkedIn



Audience Overview

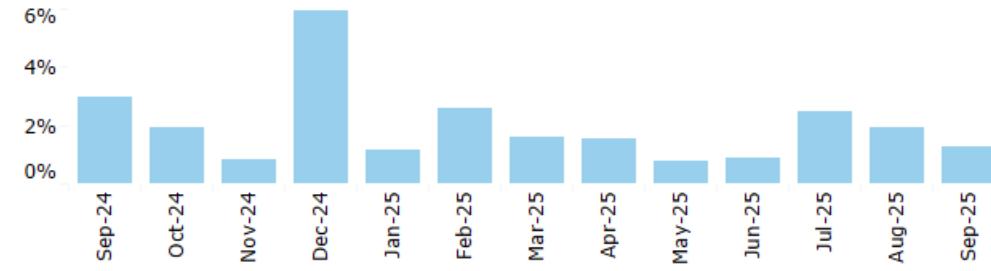
Audience
September 2025
32.2K
+4.2% YOY

Audience by Month



Engagements & Impressions

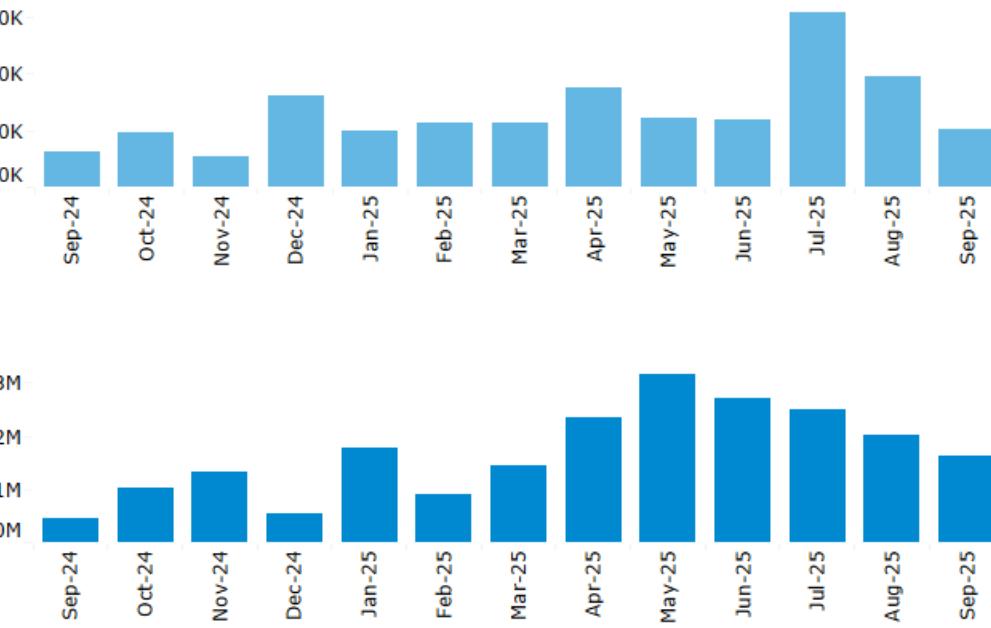
Engagement Rate
September 2025
1.2%
-1.7% pt YOY



Engagements

September 2025
20.2K
+61.2% YOY

Total Impressions
September 2025
1.6M
+273.8% YOY

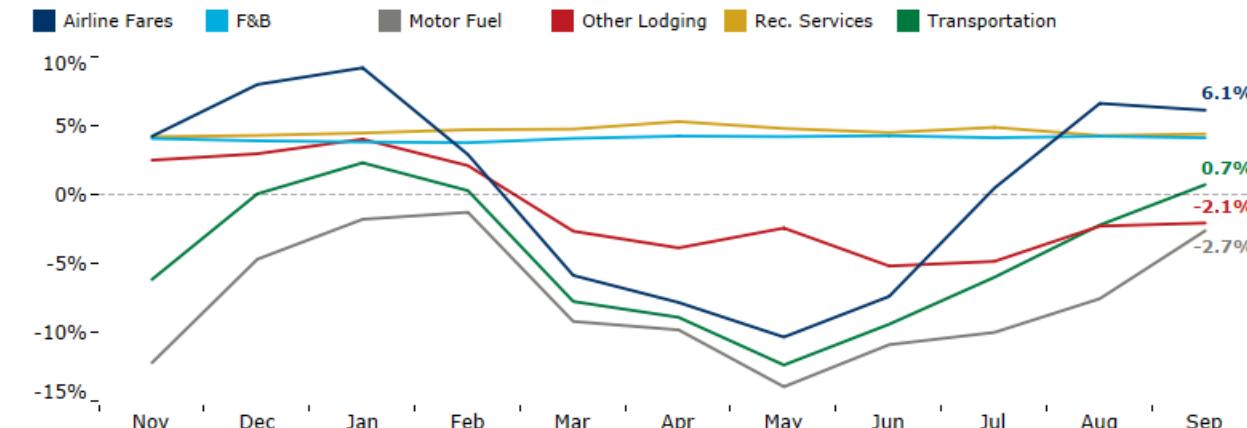


National Travel Trends

☰

Travel Price Index

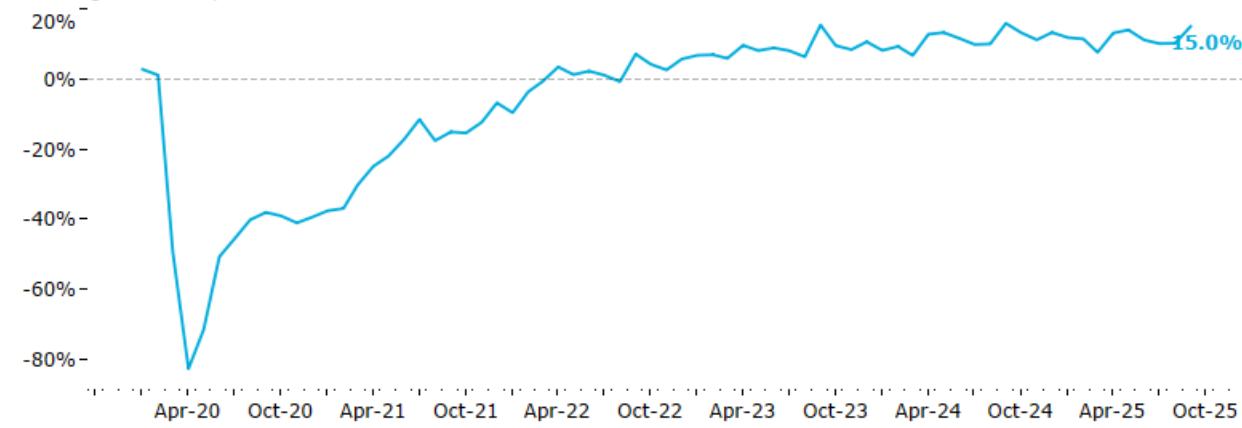
% Change Relative to Same Month in Previous Year | Last 12 Months



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

Travel Spending (% change vs 2019)

% Change vs. 2019 | U.S. total

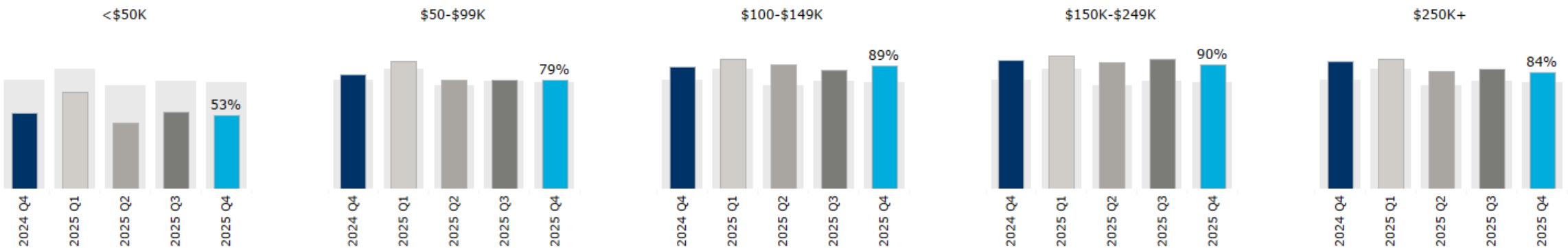


Source: Tourism Economics via U.S. Travel Recovery Tracker

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

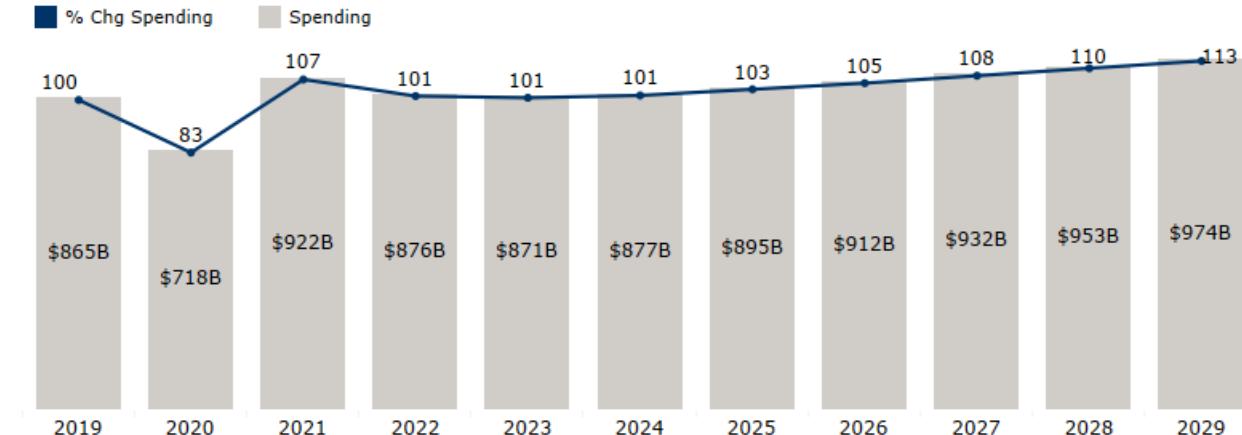
Source: MMGY Global's Portait of American Traveler

Domestic Travel Forecast

☰

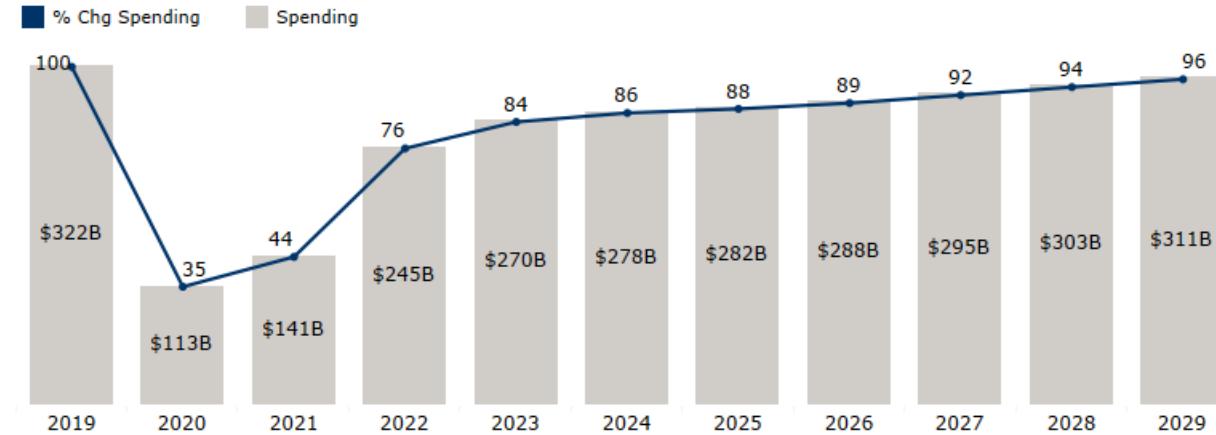
Real Domestic Leisure Travel Spending

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



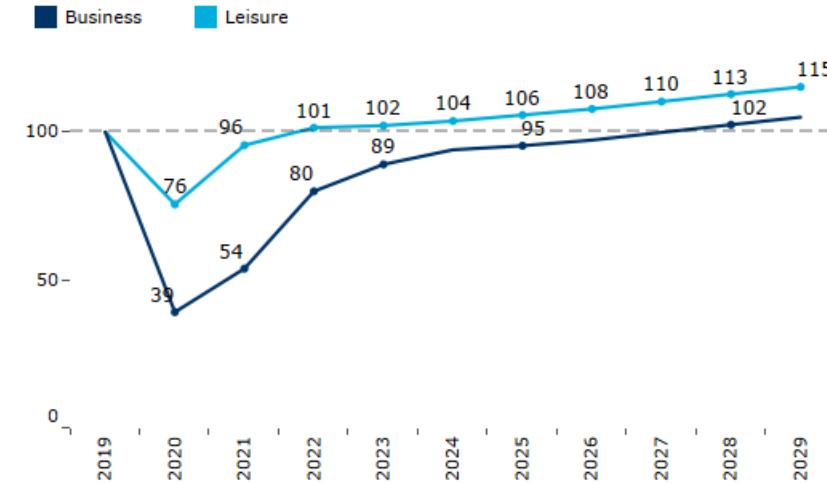
Real Domestic Business Travel Spending

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



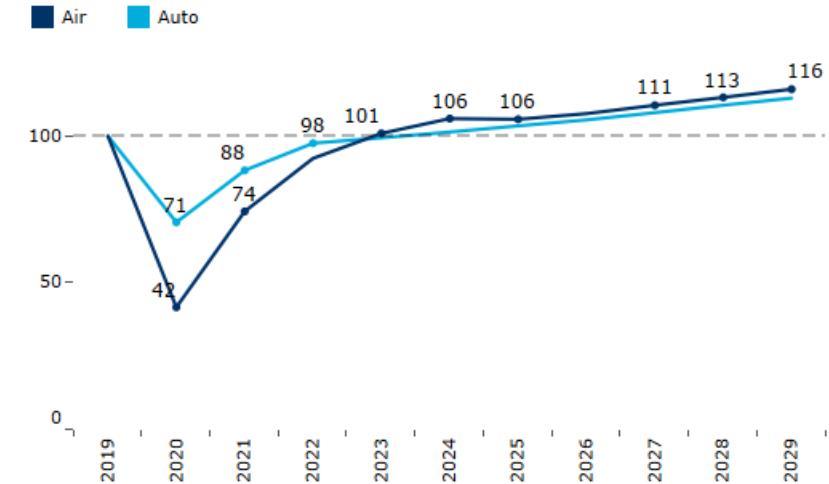
Leisure vs. Business Travel Volume

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



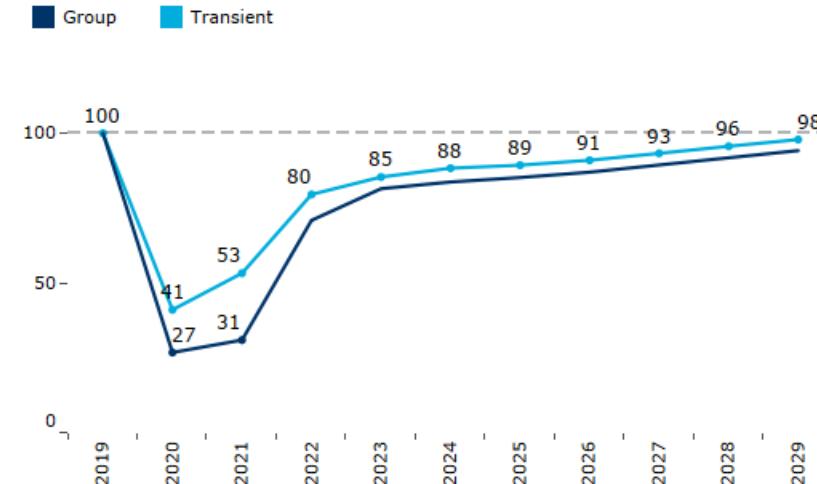
Auto vs. Air Travel Volume

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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