



Monthly Summary Report

October 2025

Executive Summary

October 2025



Month
October 2025

Highlights

Demand for Muscogee County hotels in October was -5.4% YOY less than last year. Due to supply only declining -0.1% YOY, occupancy dropped -5.4% YOY to 61%. Short-term rental demand increased 2.6% YOY, but due to supply growth of +19.1% YOY, occupancy declined -13.8% to 60.8%.

Hotel ADR decreased -0.8% YOY to \$105, combined with lower demand, revenue was -6.2% YOY less than last year at \$9.7M for the month. Short-term rental ADR increased 11.1% at \$171, which combined with more demand, generated a +14% YOY increase in revenue to \$2.1M.

Website users increased +8.9% YOY to 28.5K with 85.5% coming from US users. 30.8% came from Georgia followed by 12.3% from Alabama, 9.5% from Florida, 7% from North Carolina, and 5.4% from Tennessee.

Future Partners' survey of U.S. travelers shows that average planned travel spending per respondent continues to climb, reaching \$6,068 in September 2025, up from \$3,996 in January 2024. This 52% increase far outpaces inflation, reflecting consumers' willingness to allocate more to leisure travel.

U.S. air travel remains steady at 796M YTD passengers (flat to 2024 and above 2019), through mid-November. November MTD air travel is down 2.5%, likely due to the government shutdown. Tourism Economics estimates the shutdown cut U.S. travel spending by 2.1%, or \$62.7M per day.



Hotel Demand
93.1K
-5.4% YOY

Source: STR



ATL Checkpoint Volume
2.6M
+1.2% YOY

Source: TSA



Website Sessions
31.1K
-2.6% YOY

Source: Google Analytics



Hotel ADR
\$104.71
-0.8% YOY

Source: STR



Social Media Audience
49.4K
+7.9% YOY

Source: Sprout Social



Facebook Audience
32.4K
+4.5% YOY

Source: Meta



Overnight Trip Share
71%

Source: Azira



L&H Jobs
15.2K
+0.7% YOY

Source: Bureau of Labor Statistics

Lodging Summary

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



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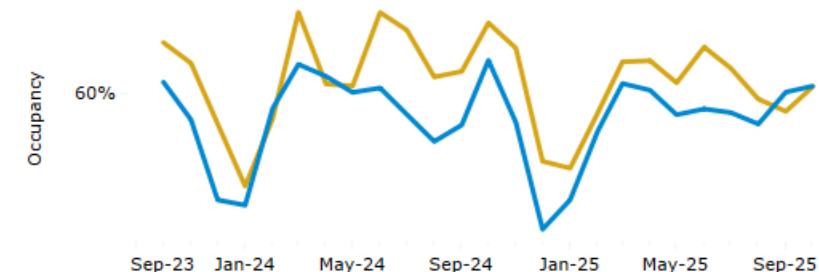
Aggregate Lodging Performance

Sources: STR & AirDNA

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Oct 2025	61.0%	\$112.29	\$68.48	172.6K	105.3K	\$11.8M
YOY % Change	-6.1% YOY	+1.1% YOY	-5.1% YOY	+1.5% YOY	-4.7% YOY	-3.6% YOY
Year-to-Date	57.6%	\$108.07	\$62.25	1.7M	968.7K	\$104.7M
YTD YOY % Change	-1.8% YOY	+2.2% YOY	+0.4% YOY	+5.4% YOY	+3.5% YOY	+5.8% YOY

Occupancy by Month

Hotels Short Term Vacation Rentals



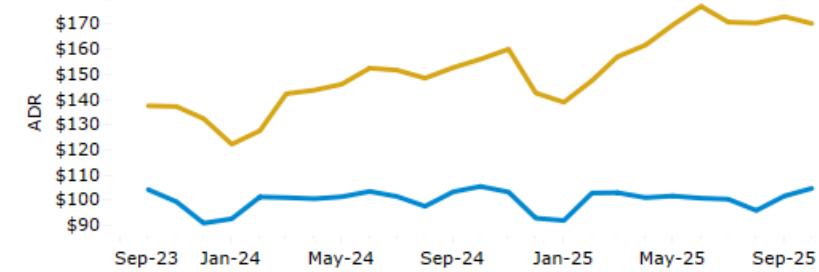
Hotel Performance

Source: STR

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Oct 2025	61.0%	\$104.71	\$63.88	152.6K	93.1K	\$9.7M
YOY % Change	-5.4% YOY	-0.8% YOY	-6.1% YOY	-0.1% YOY	-5.4% YOY	-6.2% YOY
Year-to-Date	57.2%	\$100.64	\$57.59	1.5M	856.6K	\$86.2M
YTD YOY % Change	-1.5% YOY	-0.5% YOY	-2.0% YOY	+3.7% YOY	+2.1% YOY	+1.6% YOY

ADR by Month

Hotels Short Term Vacation Rentals



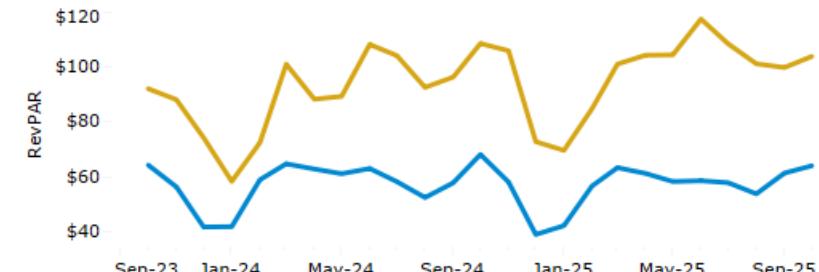
Short Term Vacation Rental Performance

Source: AirDNA (All Properties)

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Oct 2025	60.9%	\$170.26	\$103.67	20.0K	12.2K	\$2.1M
YOY % Change	-12.3% YOY	+9.1% YOY	-4.4% YOY	+15.6% YOY	+1.4% YOY	+10.6% YOY
Year-to-Date	60.6%	\$164.88	\$99.97	184.8K	112.1K	\$18.5M
YTD YOY % Change	-4.5% YOY	+12.9% YOY	+7.8% YOY	+21.5% YOY	+16.1% YOY	+31.1% YOY

RevPAR by Month

Hotels Short Term Vacation Rentals

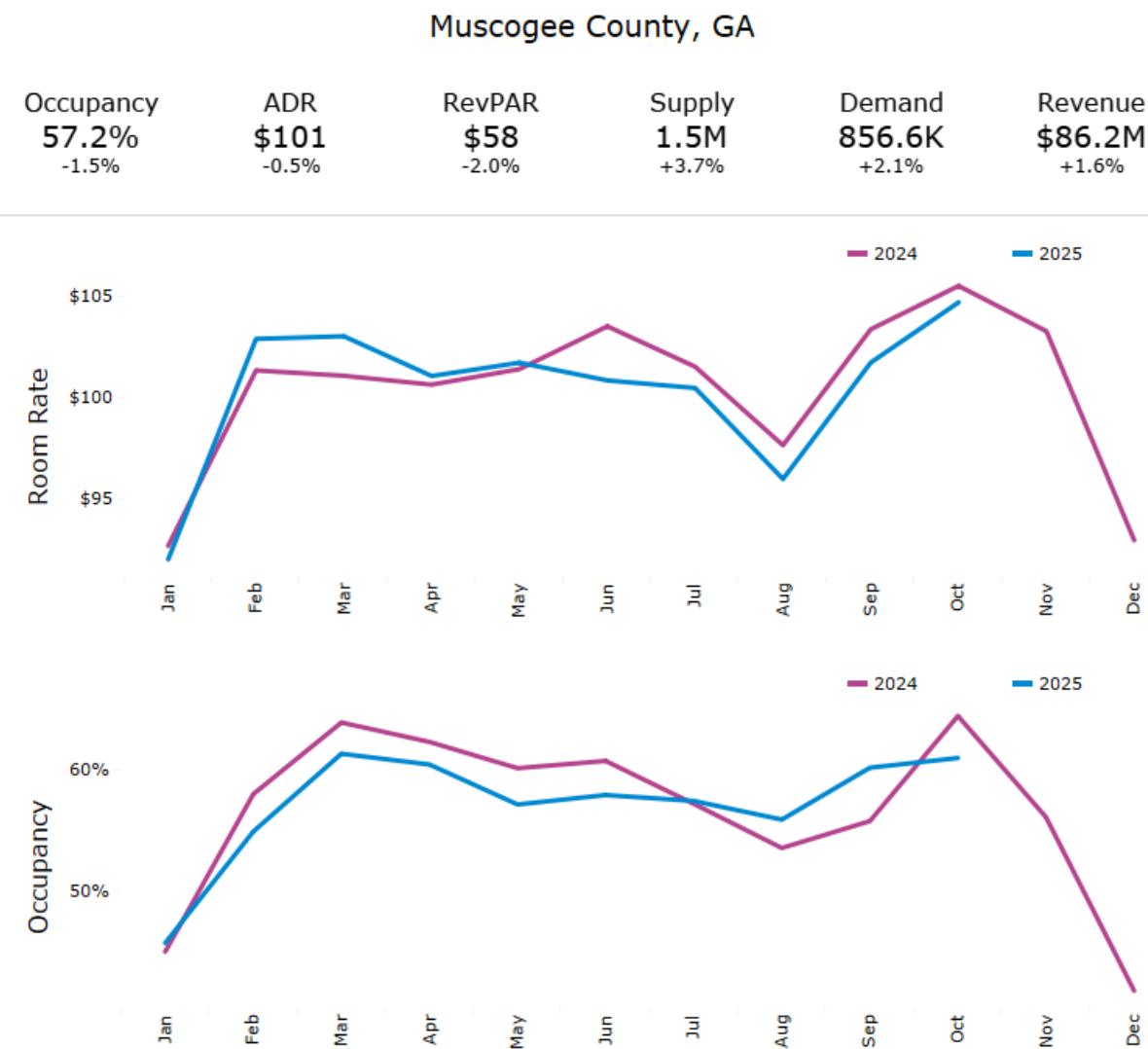


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Monthly Performance by Market

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Aug	Muscogee County, GA	55.9%	\$96	-1.7%	\$54	+2.6%
	Russell County, AL	46.2%	\$99	-5.7%	\$46	+2.0%
Sep	Muscogee County, GA	60.2%	\$102	-1.6%	\$61	+6.2%
	Russell County, AL	51.5%	\$106	-6.1%	\$54	+5.9%
Oct	Muscogee County, GA	61.0%	\$105	-0.8%	\$64	-6.1%
	Russell County, AL	52.1%	\$109	-2.3%	\$57	-5.4%

Calendar Year-to-Date Performance



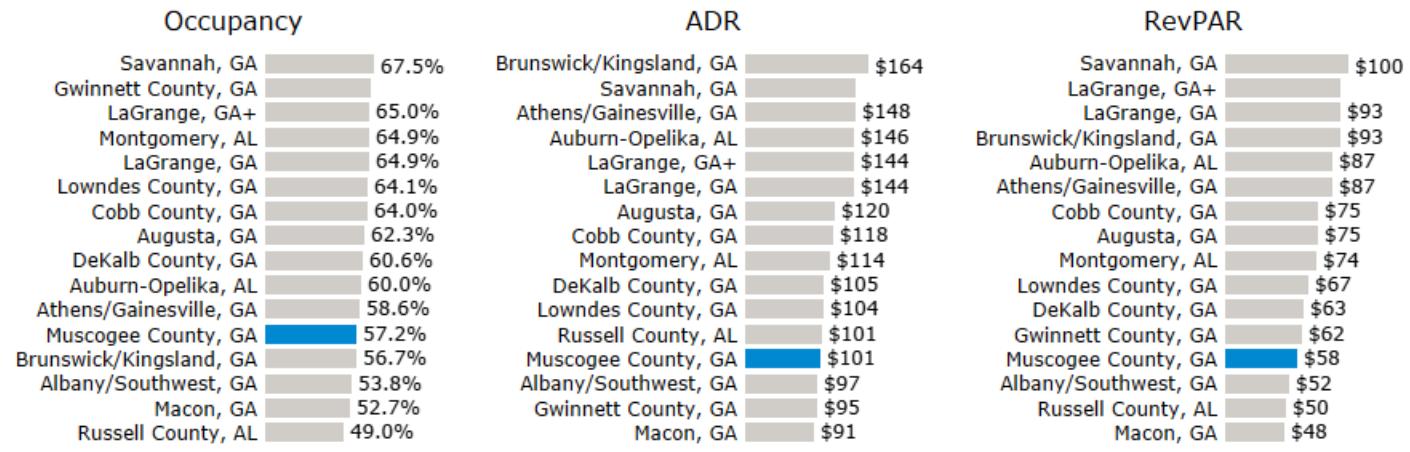
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Monthly Performance by Market

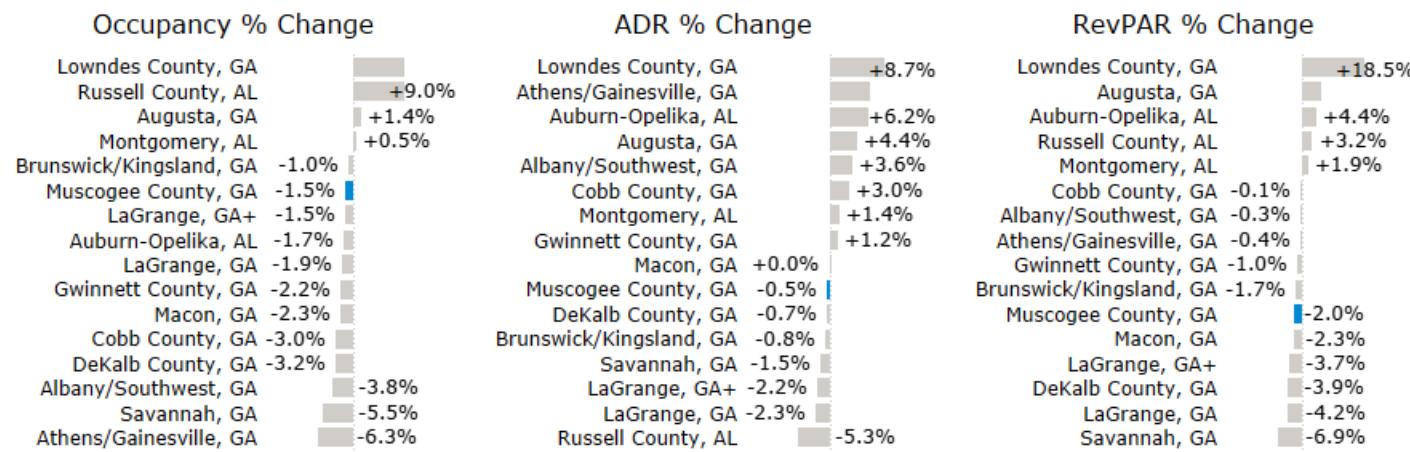
	OCC	% CHG	ADR	% CHG	RevPAR	% CHG	
Aug	Muscogee County, GA	55.9%	+4.4%	\$96	-1.7%	\$54	+2.6%
	Albany/Southwest, GA	49.2%	-4.4%	\$94	+4.6%	\$46	+0.0%
	Athens/Gainesville, GA	54.7%	-8.9%	\$138	+4.6%	\$75	-4.7%
	Auburn-Opelika, AL	64.0%	-8.9%	\$146	+2.0%	\$94	-7.1%
	Augusta, GA	60.4%	+0.4%	\$100	+3.3%	\$60	+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%
	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%
Oct	Muscogee County, GA	61.0%	-5.4%	\$105	-0.8%	\$64	-6.1%
	Albany/Southwest, GA	54.1%	-20.3%	\$104	+1.1%	\$56	-19.5%
	Athens/Gainesville, GA	63.4%	-9.9%	\$191	+7.8%	\$121	-2.9%
	Auburn-Opelika, AL	57.8%	-9.0%	\$207	+66.8%	\$120	+51.8%
	Augusta, GA	57.0%	-29.6%	\$97	-16.0%	\$55	-40.9%
	Brunswick/Kingsland, ..	55.5%	-12.4%	\$161	+4.1%	\$89	-8.8%
	Cobb County, GA	60.1%	-12.9%	\$101	-5.7%	\$61	-17.9%
	DeKalb County, GA	60.6%	-8.4%	\$105	-1.8%	\$64	-10.0%
	Gwinnett County, GA	66.7%	-6.1%	\$99	-0.8%	\$66	-6.8%
	LaGrange, GA	67.2%	-2.1%	\$133	+1.0%	\$90	-1.2%
	LaGrange, GA+	67.2%	-2.1%	\$133	+1.0%	\$90	-1.2%
	Lowndes County, GA	58.0%	-28.8%	\$108	-3.7%	\$62	-31.4%
	Macon, GA	57.3%	-16.3%	\$94	-3.6%	\$54	-19.3%
	Montgomery, AL	62.1%	-9.5%	\$115	+0.4%	\$71	-9.2%
	Russell County, AL	52.1%	-3.2%	\$109	-2.3%	\$57	-5.4%
	Savannah, GA	66.6%	-13.7%	\$152	-4.8%	\$101	-17.8%

Calendar Year-to-Date Performance

Performance by Market



% Change vs. Previous Year





Monthly Performance by Market

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
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Aug

Columbus	59.3%	-4.7%	\$170	+14.7%	\$101	+9.3%
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Sep

Columbus	57.6%	-8.5%	\$173	+13.3%	\$100	+3.6%
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Oct

Columbus	60.9%	-12.3%	\$170	+9.1%	\$104	-4.4%
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Calendar Year-to-Date Performance

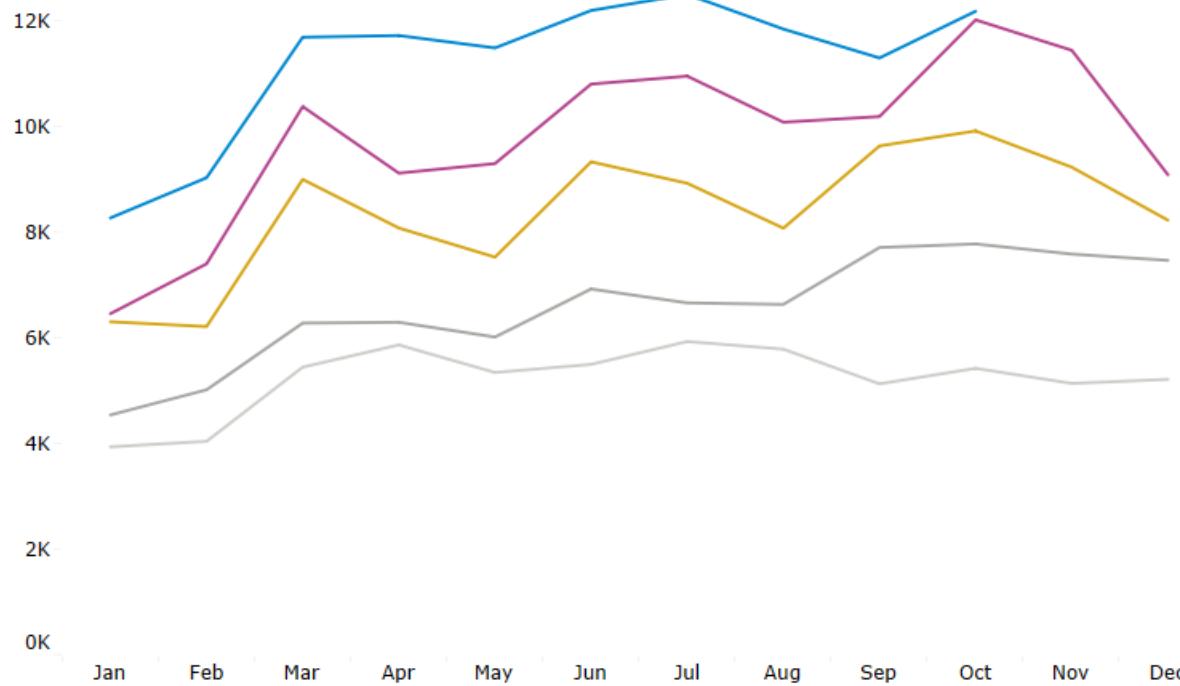
Columbus
All Properties

Occupancy 60.6% -4.5%	ADR \$165 +12.9%	RevPAR \$100 +7.8%	Supply 184.8K +21.5%	Demand 112.1K +16.1%	Revenue \$18.5M +31.1%
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Short Term Rental Demand by Month

Last Five Calendar Years

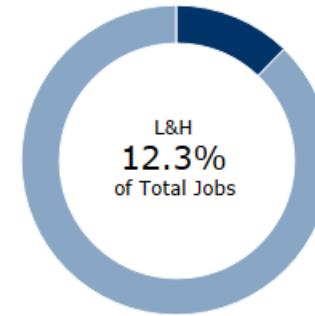
2021 2022 2023 2024 2025





Total Leisure & Hospitality Jobs

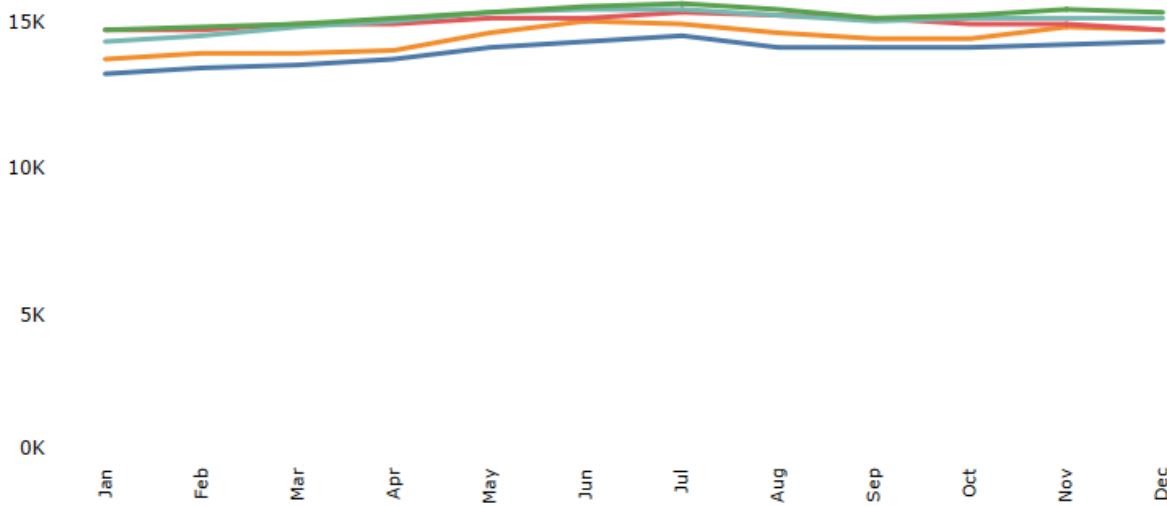
L&H Jobs
as of October 2025
15.2K
+0.7% YOY | +0.0% vs. 2019



Employment Recovery

Leisure & Hospitality Jobs (Thousands)

2021 2022 2023 2024 2025



Source: Bureau of Labor Statistics

Leisure & Hospitality Job Openings

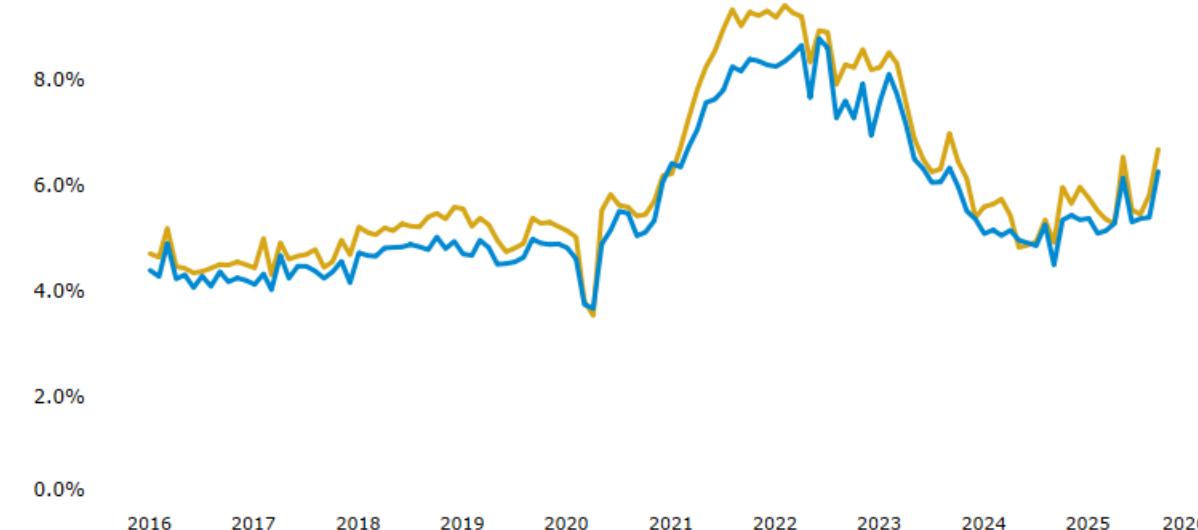
L&H Job Openings
as of October 2025

L&H
Opening Rate

Job Opening Rate

Share of total available jobs that are not filled

Leisure and Hospitality Total Nonfarm



Source: Tourism Economics

Airport TSA Checkpoint Volume & Visitor Origins

ATL - Hartsfield - Jackson Atlanta International



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Monthly TSA Checkpoint Volume

October 2025 Volume

2.6M

+1.2% YOY

Year-to-Date TSA Checkpoint Volume & Visitor Origins

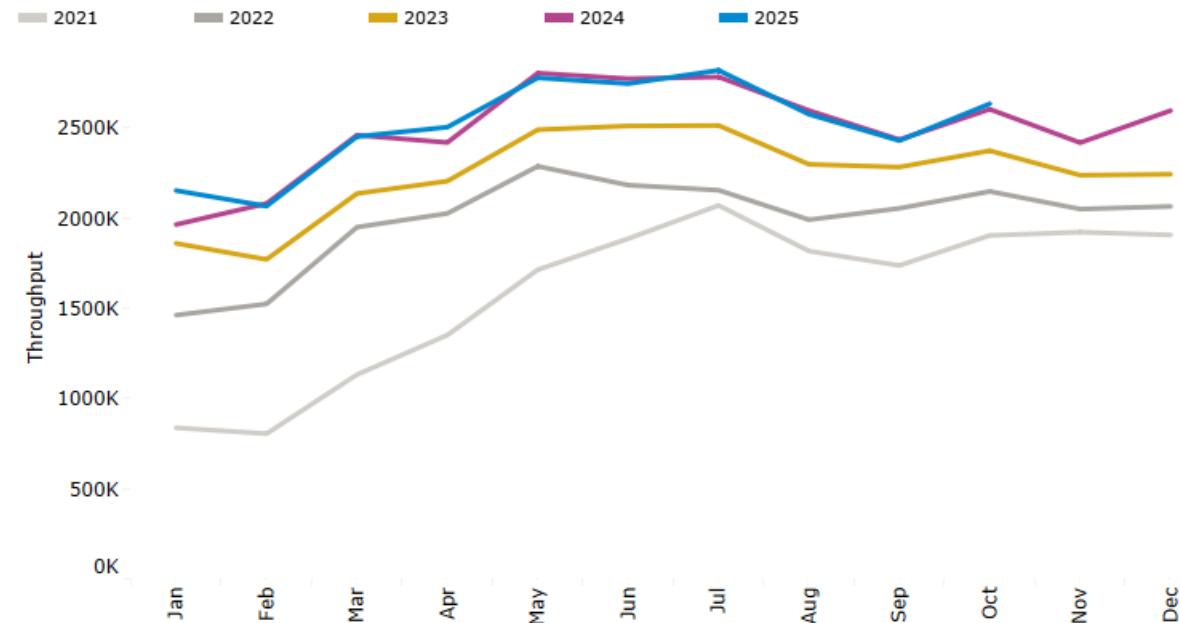
Jan - Oct 2025 Volume

25.2M

+1.0% YOY

TSA Checkpoint Volume by Month

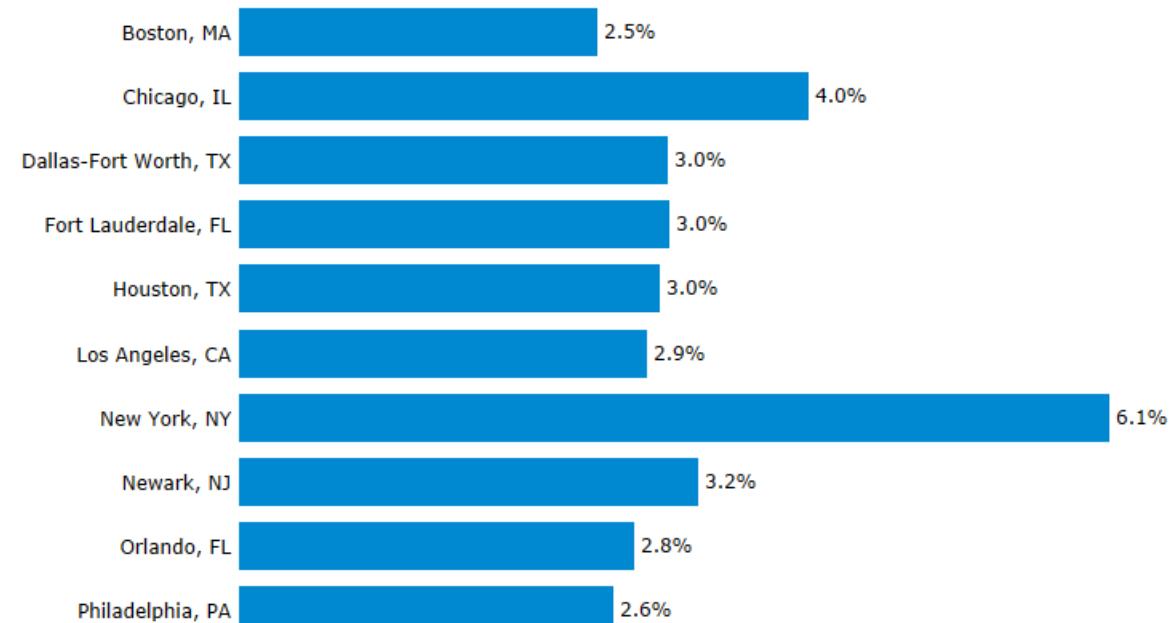
Last Five Calendar Years



Source: Transportation Security Administration

Top Origin Markets - Air

Jan - Oct 2025 Visitor Arrivals



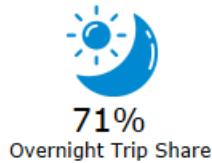
Source: OAG

Source: Transportation Security Administration

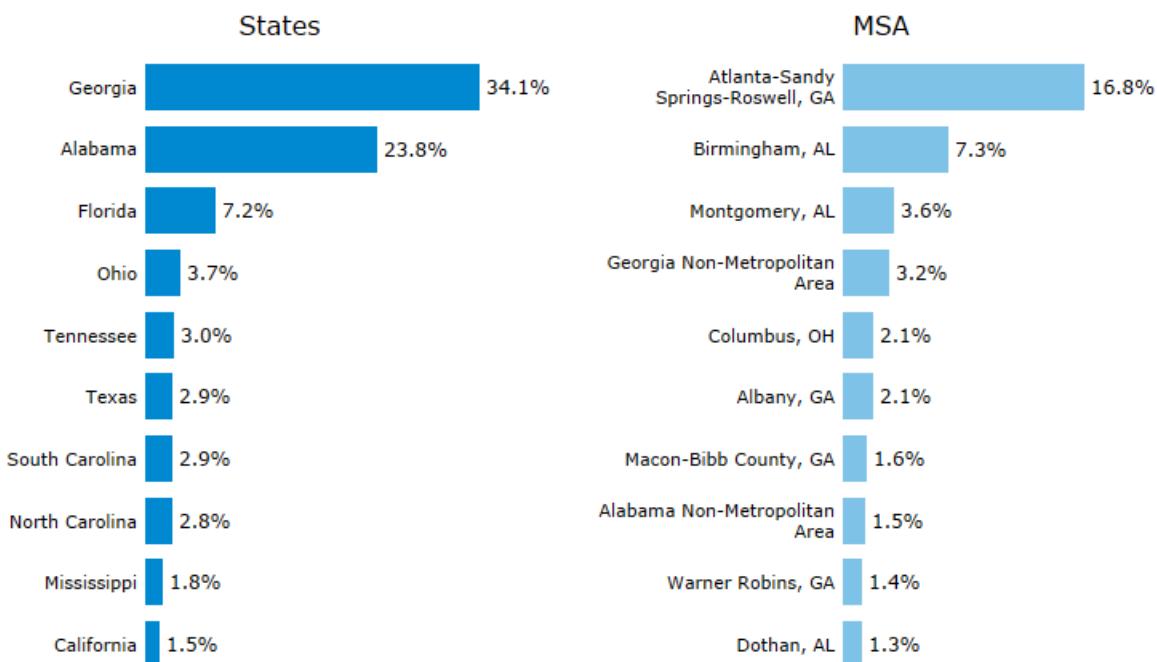
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October 2025 Domestic Visits

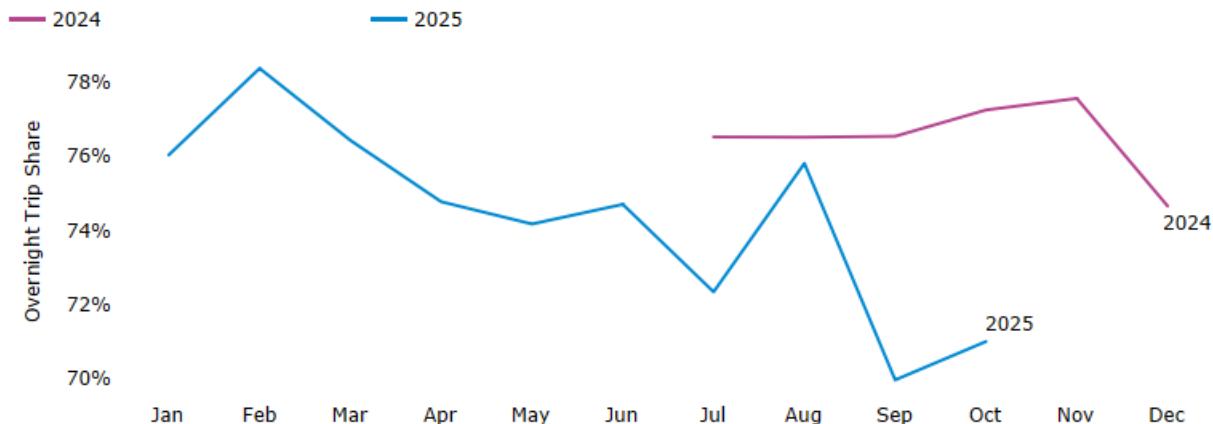


Top Origin Markets



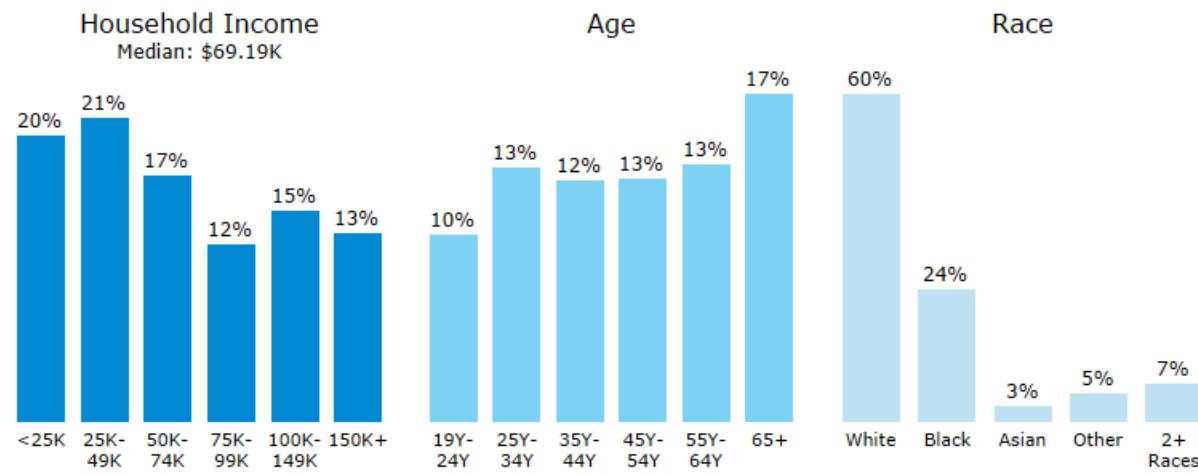
Domestic Visitor Trends & Characteristics

Overnight Trip Share by Month



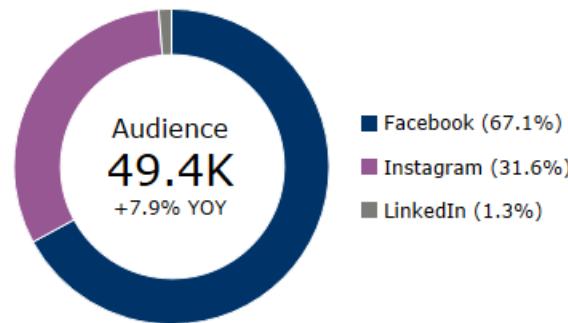
October 2025 Visitor Origin Demographics

Share of Total

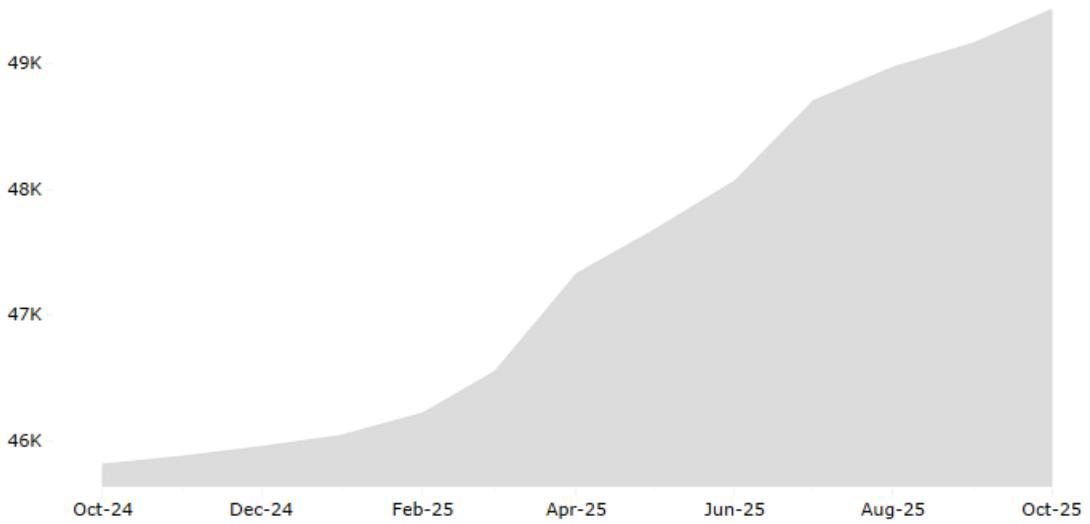




Audience Overview



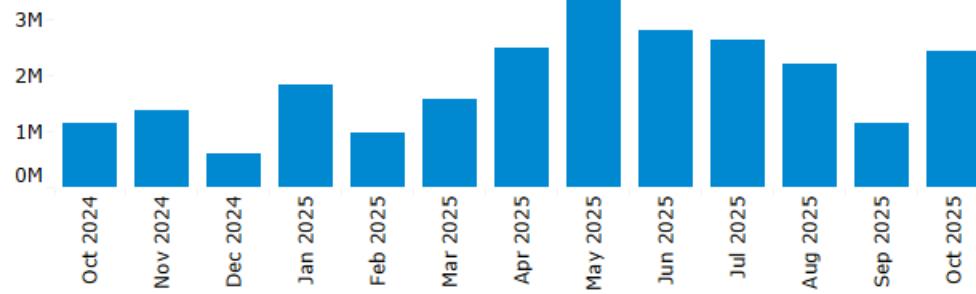
Audience by Month



Engagements & Impressions

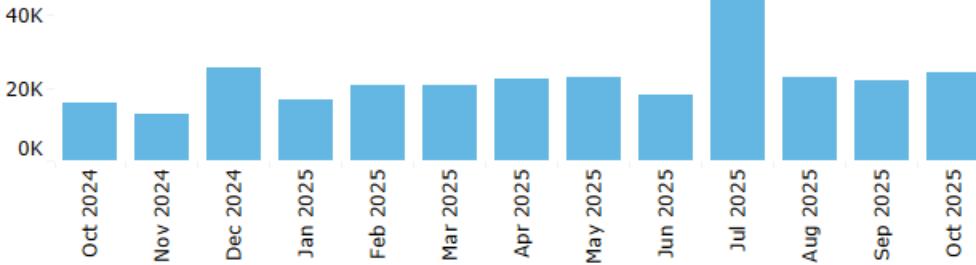
Impressions

October 2025
2.4M
+113.4% YOY



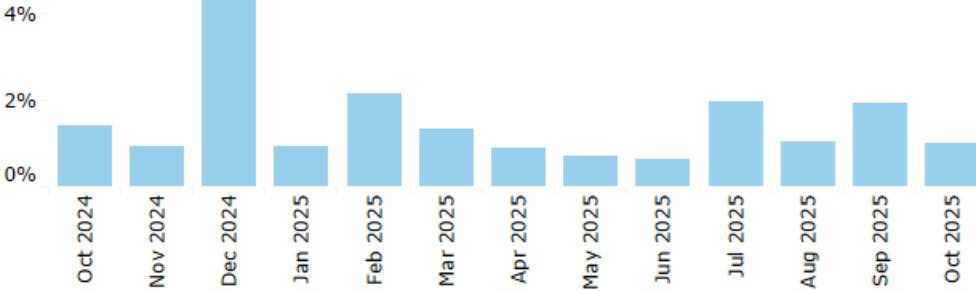
Engagements

October 2025
24.3K
+51.6% YOY



Engagement Rate

October 2025
1.0%
-0.4% pt YOY



Website Performance Summary

October 2025 | Properties: All



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Users
28.5K
+8.9% YOY



Sessions
31.1K
-2.6% YOY



Engaged Sessions
12.1K
-28.5% YOY



Engagement Rate
38.8%
-14.09% pt YOY



Page Views
46.5K
-5.1% YOY



Pages Per Session
1.49 pages
-0.04 pages YOY



Avg. Session Duration
00:01:31
-15 sec YOY



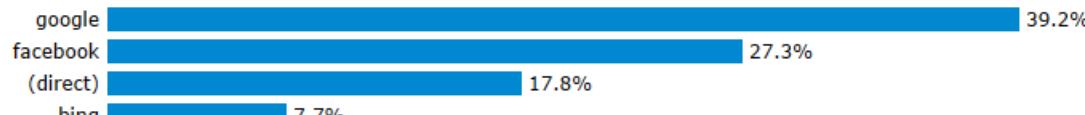
Bounce Rate
61.2%
+14.09% pt YOY

Campaigns



Arts & Culture ~ Colum... 3.3%
Family Friendly ~ Colu... 3.1%
Outdoor Adventure ~ C... 3.0%
(referral) 2.8%
(not set) 1.0%
Southern+Living 0.1%

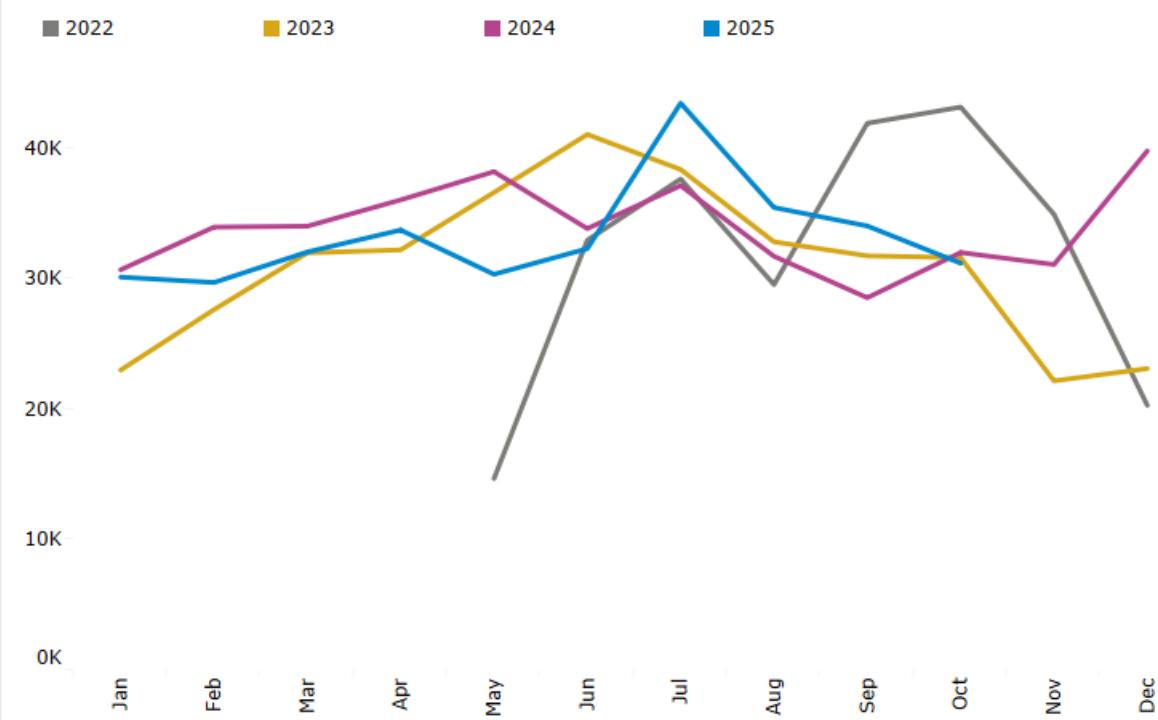
Sources



display 2.8%
(not set) 0.9%
m.facebook.com 0.4%
yahoo 0.4%
gastateparks.org 0.3%
exploregeorgia.org 0.3%

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

October 2025



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Facebook



Audience
33.2K
+4.6% YOY

Engagement Rate	1.0%
Impressions	2,294,431
Video Views	682
Engagements	22,117
Comments	173
Reactions	2,110
Shares	232
Post Link Clicks	13,690
Other Post Clicks	5,912

Instagram



Audience
15.6K
+10.7% YOY

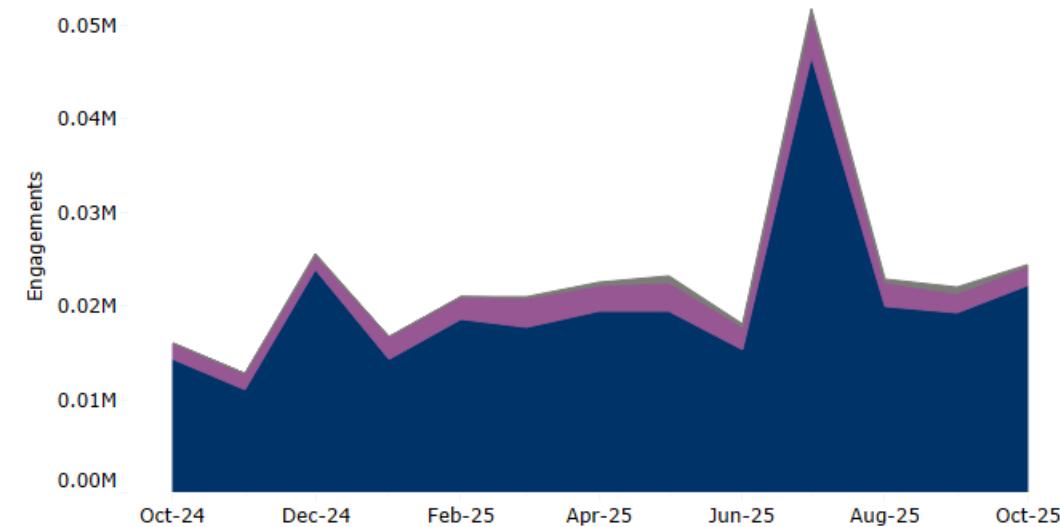
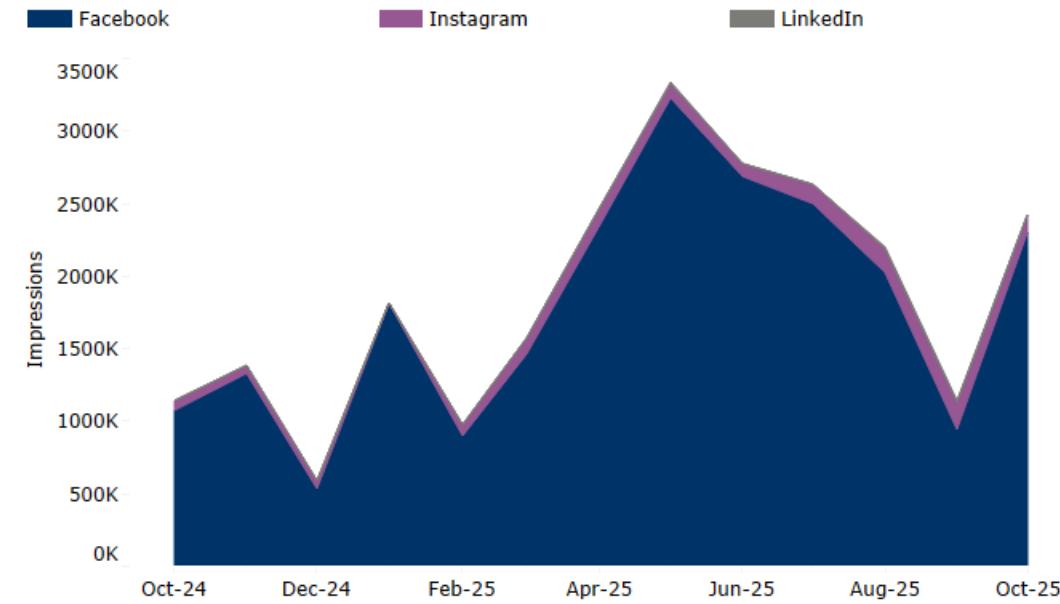
Engagement Rate	1.6%
Impressions	126,749
Video Views	1,736
Engagements	2,016
Comments	130
Reactions	1,643
Saves	
Shares	184

LinkedIn



Audience
641

Engagement Rate	7.0%
Impressions	1,769
Video Views	0
Engagements	124
Comments	4
Reactions	69
Shares	3
Post Link Clicks	

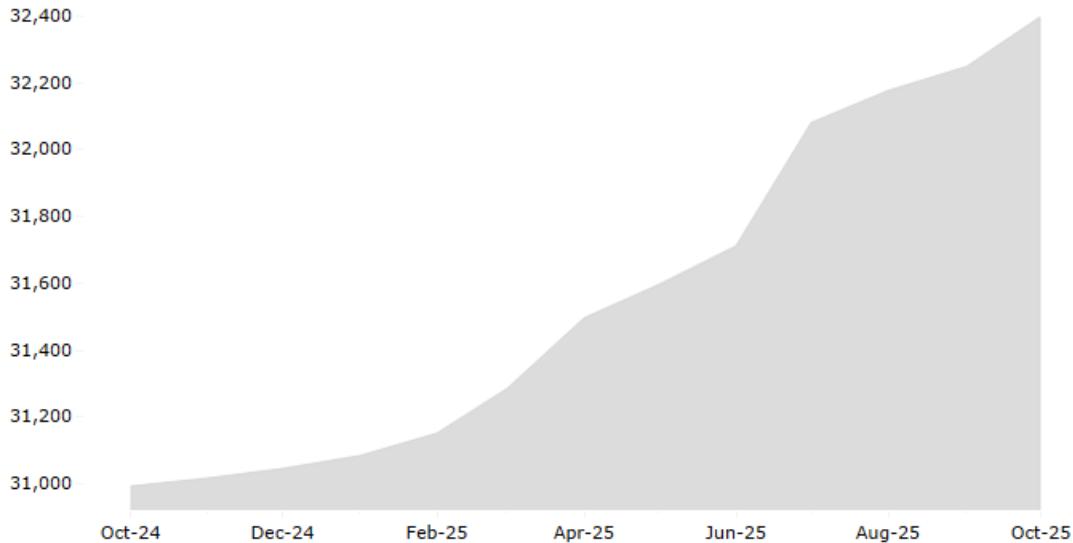


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Audience Overview

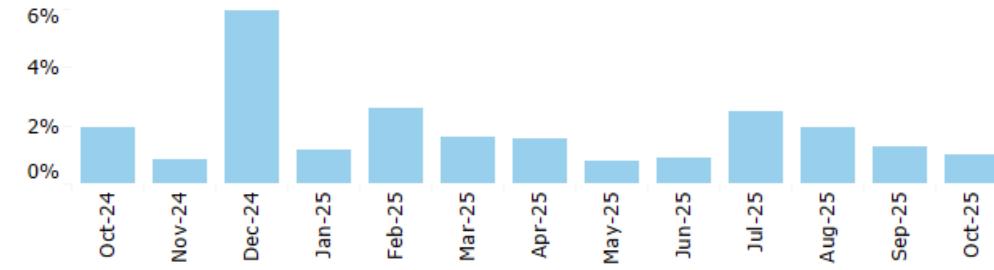
Audience
October 2025
32.4K
+4.5% YOY

Audience by Month



Engagements & Impressions

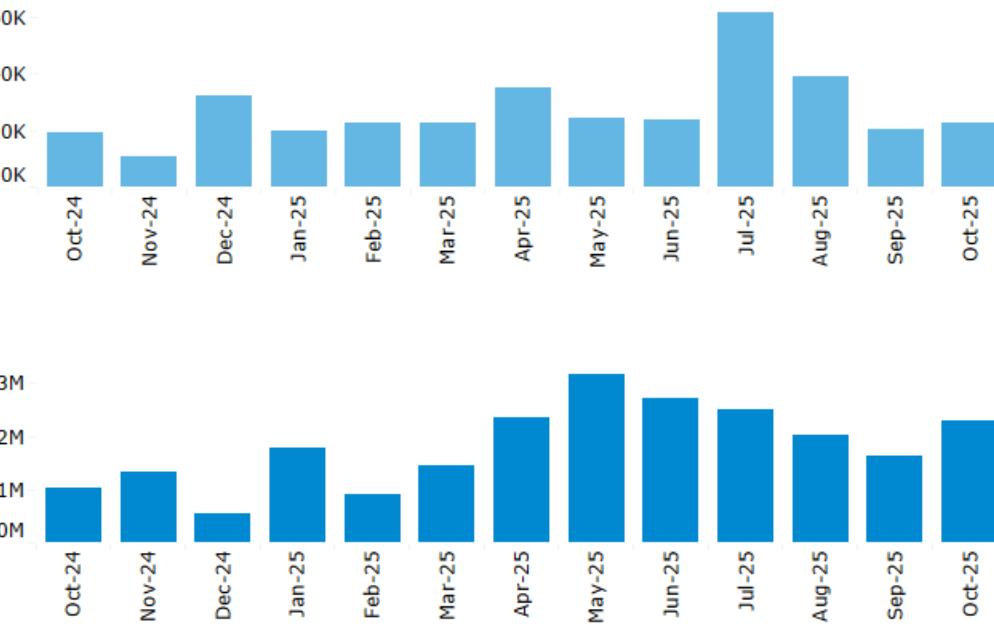
Engagement Rate
October 2025
1.0%
-0.9% pt YOY



Engagements

October 2025
22.4K
+17.6% YOY

Total Impressions
October 2025
2.3M
+121.8% YOY

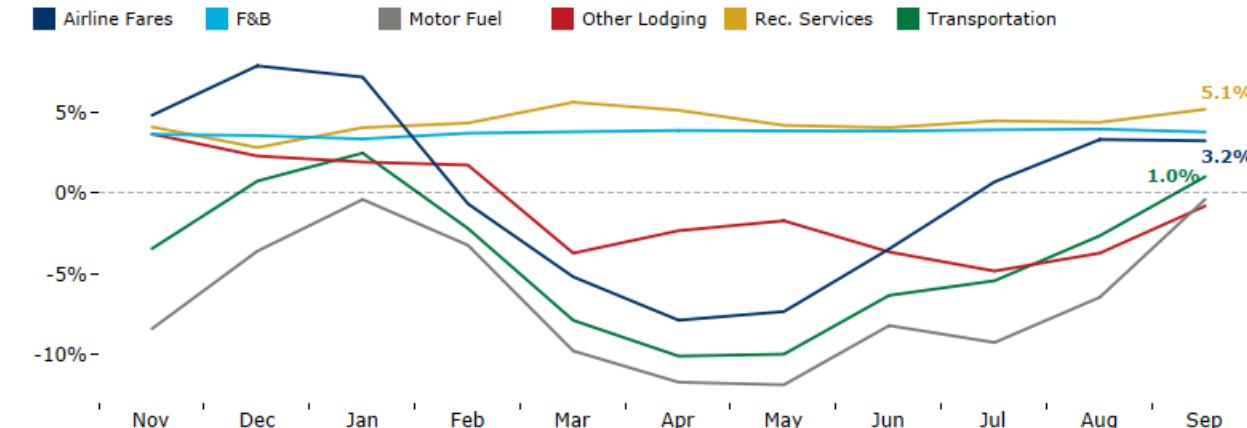


National Travel Trends



Travel Price Index

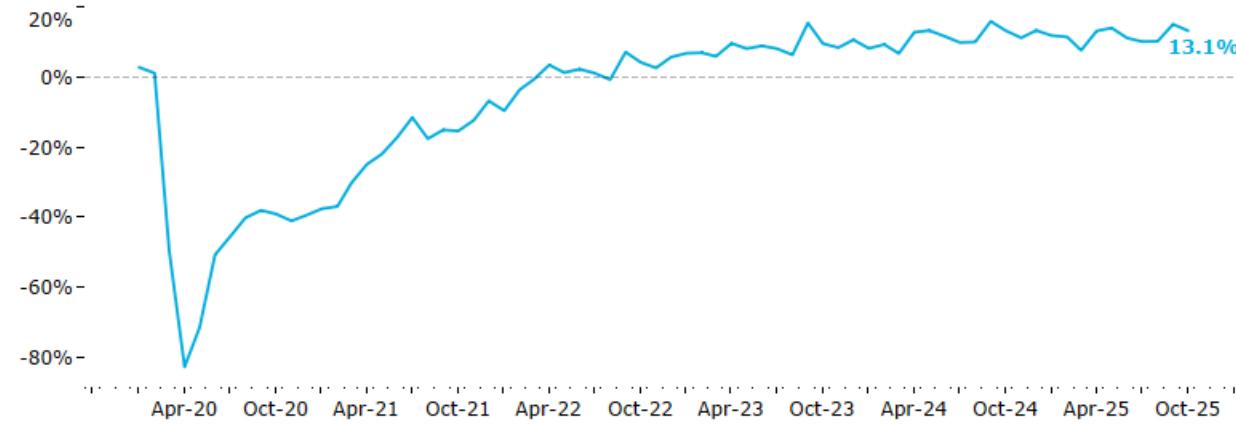
% Change Relative to Same Month in Previous Year | Last 12 Months



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

Travel Spending (% change vs 2019)

% Change vs. 2019 | U.S. total

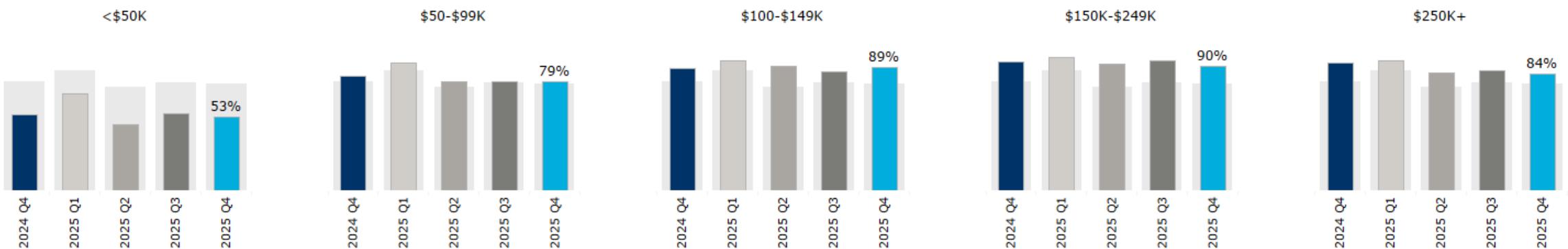


Source: Tourism Economics via U.S. Travel Recovery Tracker

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

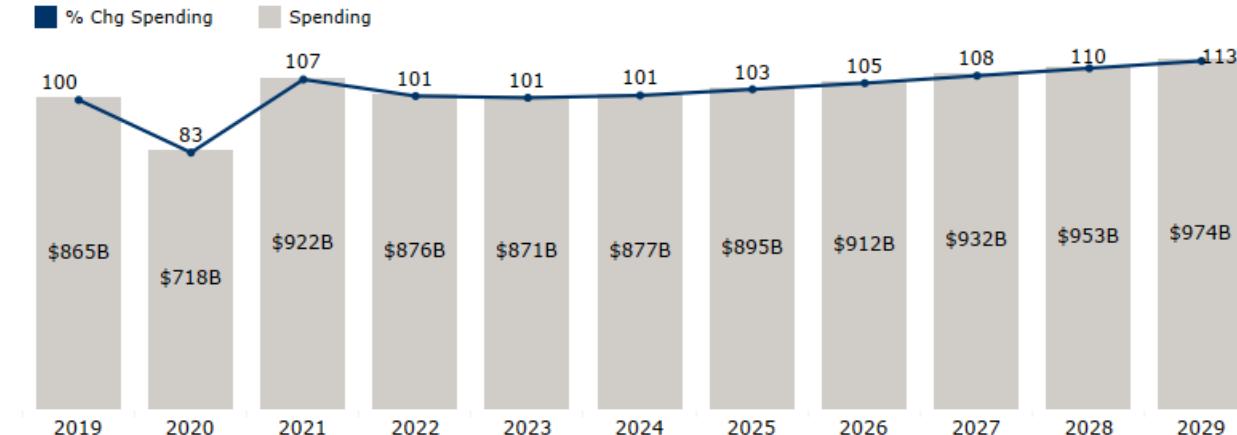
Source: MMGY Global's Portait of American Traveler

Domestic Travel Forecast

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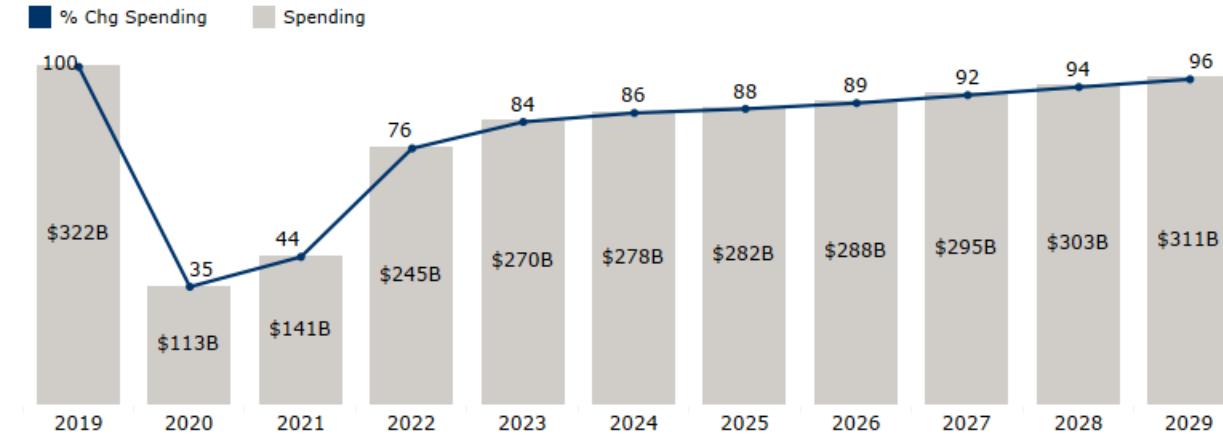
Real Domestic Leisure Travel Spending

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



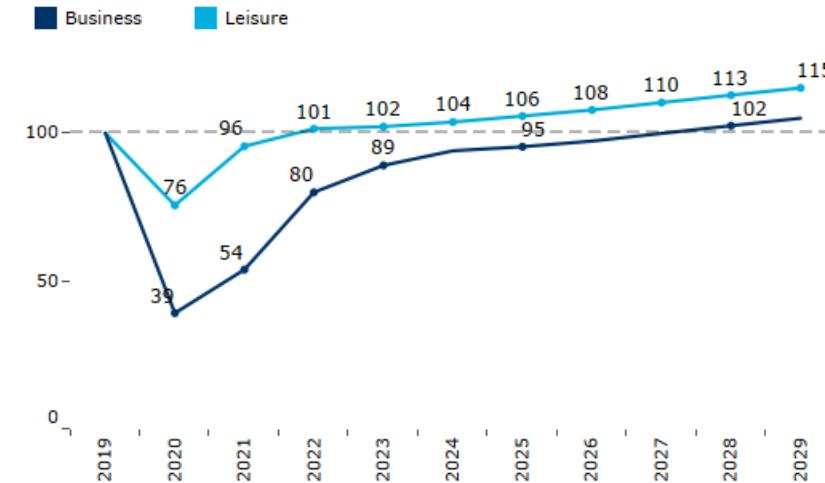
Real Domestic Business Travel Spending

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



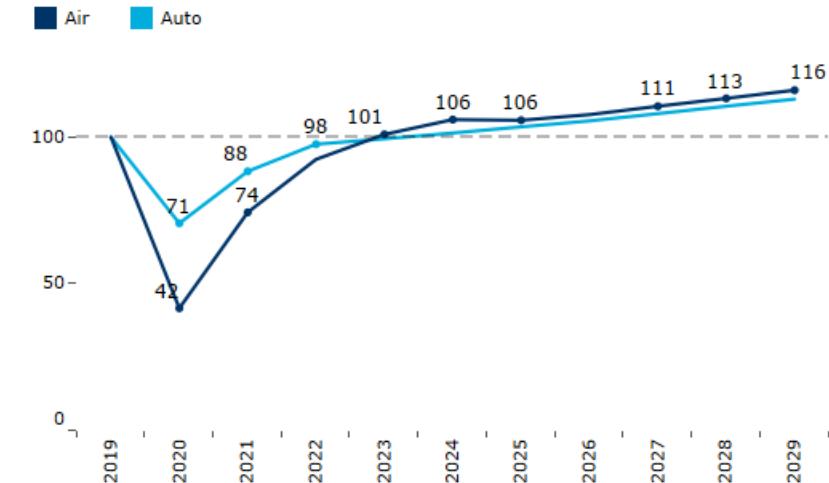
Leisure vs. Business Travel Volume

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



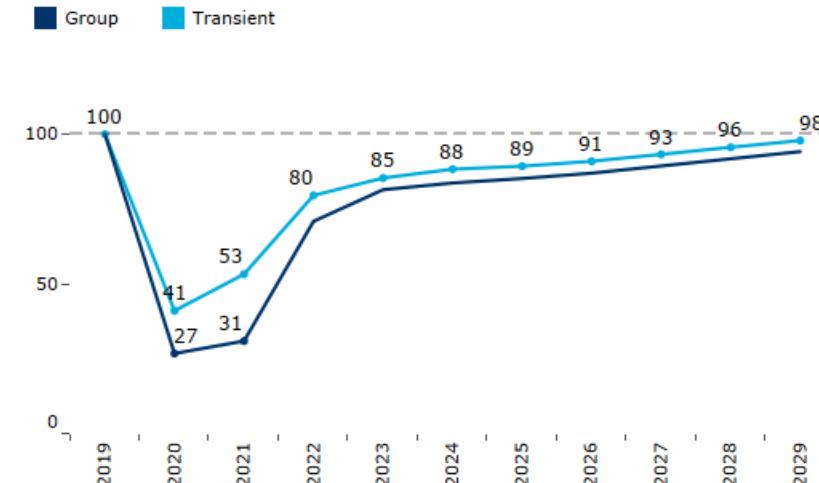
Auto vs. Air Travel Volume

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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