



# Monthly Summary Report

## December 2025



Month  
December 2025

## Highlights

Demand in December for Columbus hotels was -0.8% YOY less than last year causing an equal -0.8% YOY drop in occupancy to 55.7%. In the full year CY25, demand was +1.8% YOY higher than last year but with +3.3% YOY more rooms to fill, occupancy declined -1.5% YOY to 57.1%.

ADR in December was -1.8% YOY lower than last year at \$101. In CY25, ADR was -0.6% YOY lower also at \$101. The declines in ADR and demand in December resulted in -2.6% YOY less revenue at \$8.3M for the month. However, in CY25, the increase in demand offset the lower ADR generating +1.2% YOY more revenue for the year at \$94.6M.

Demand for short term rental increased in both December at +6.5% YOY and +15.1% YOY in CY25. But, supply increased more at +13.7% YOY in December and +20.7% YOY in CY25. As a result, December occupancy was -6.3% YOY lower than last year at 61.9% and -4.7% YOY lower in CY25 at 60.8%.

U.S. hotels closed 2025 with year-end occupancy down 1.2% compared to 2024, to 62.3%, as demand declined 0.5% while supply expanded 0.7%. ADR growth remained positive at 0.9%, helping limit the decline in RevPAR to 0.3%, while total hotel revenue increased 0.4% for the year.

Tourism Economics forecasts 1.8% growth in domestic trips in 2025 despite weaker hotel demand, supported by rising use of STVRs and cruises. Softer hotel demand is partly tied to a 2.9% YOY decline in U.S. international arrivals in December, the eighth straight monthly drop.



Hotel Demand  
**69.2K**  
+8.4% YOY

Source: STR



Hotel ADR  
**\$90.96**  
-2.1% YOY

Source: STR



ATL Checkpoint Volume  
**2.6M**  
-0.7% YOY

Source: TSA



Social Media Audience  
**49.8K**  
+8.4% YOY

Source: Sprout Social



Facebook Audience  
**32.5K**  
+4.8% YOY

Source: Meta



Website Sessions  
**29.4K**  
-26.1% YOY

Source: Google Analytics



Overnight Trip Share  
**75%**

Source: Azira

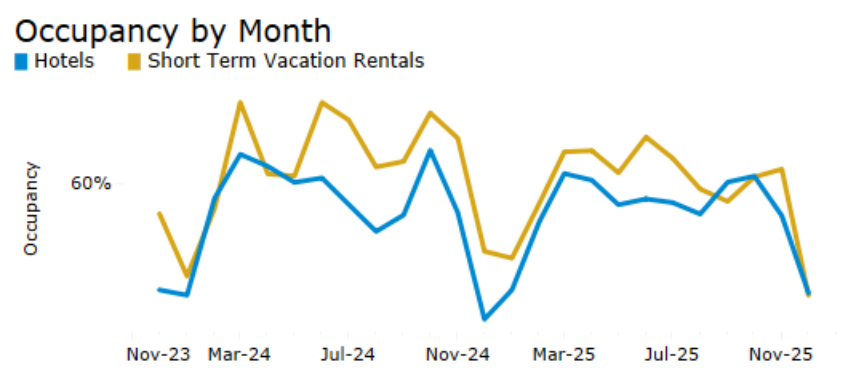


L&H Jobs  
**15.3K**  
+1.3% YOY

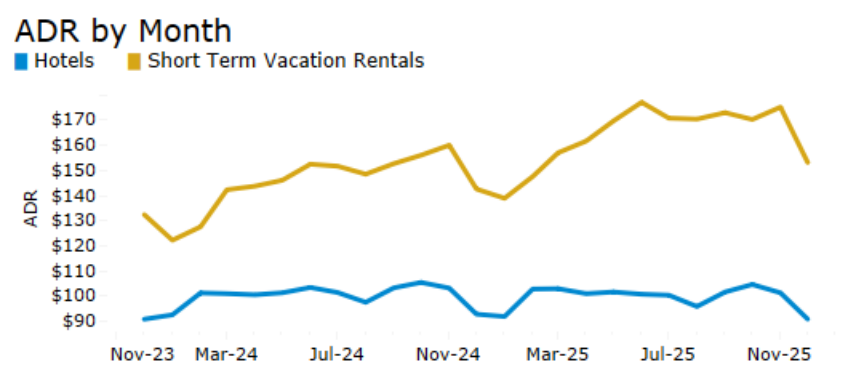
Source: Bureau of Labor Statistics



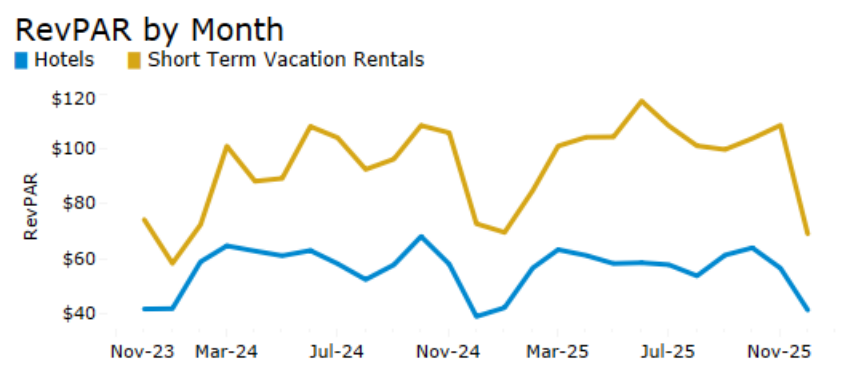
Aggregate Lodging Performance						
Sources: STR & AirDNA						
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Dec 2025	45.3%	\$97.99	\$44.42	172.2K	78.1K	\$7.6M
YOY % Change	+6.0% YOY	-1.1% YOY	+4.8% YOY	+1.0% YOY	+7.0% YOY	+5.8% YOY
Year-to-Date	56.5%	\$107.62	\$60.76	2.0M	1.1M	\$122.8M
YTD YOY % Change	-1.1% YOY	+1.8% YOY	+0.6% YOY	+4.6% YOY	+3.4% YOY	+5.3% YOY



Hotel Performance						
Source: STR						
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Dec 2025	45.4%	\$90.96	\$41.27	152.6K	69.2K	\$6.3M
YOY % Change	+8.5% YOY	-2.1% YOY	+6.2% YOY	-0.1% YOY	+8.4% YOY	+6.1% YOY
Year-to-Date	56.1%	\$100.04	\$56.11	1.8M	1.0M	\$100.9M
YTD YOY % Change	-0.8% YOY	-0.8% YOY	-1.5% YOY	+3.0% YOY	+2.2% YOY	+1.5% YOY



Short Term Vacation Rental Performance						
Source: AirDNA (All Properties)						
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Dec 2025	45.0%	\$153.19	\$69.00	19.6K	8.8K	\$1.4M
YOY % Change	-11.6% YOY	+7.4% YOY	-5.0% YOY	+10.0% YOY	-2.8% YOY	+4.4% YOY
Year-to-Date	59.4%	\$165.05	\$98.01	224.0K	133.0K	\$22.0M
YTD YOY % Change	-5.0% YOY	+12.2% YOY	+6.5% YOY	+19.7% YOY	+13.7% YOY	+27.5% YOY

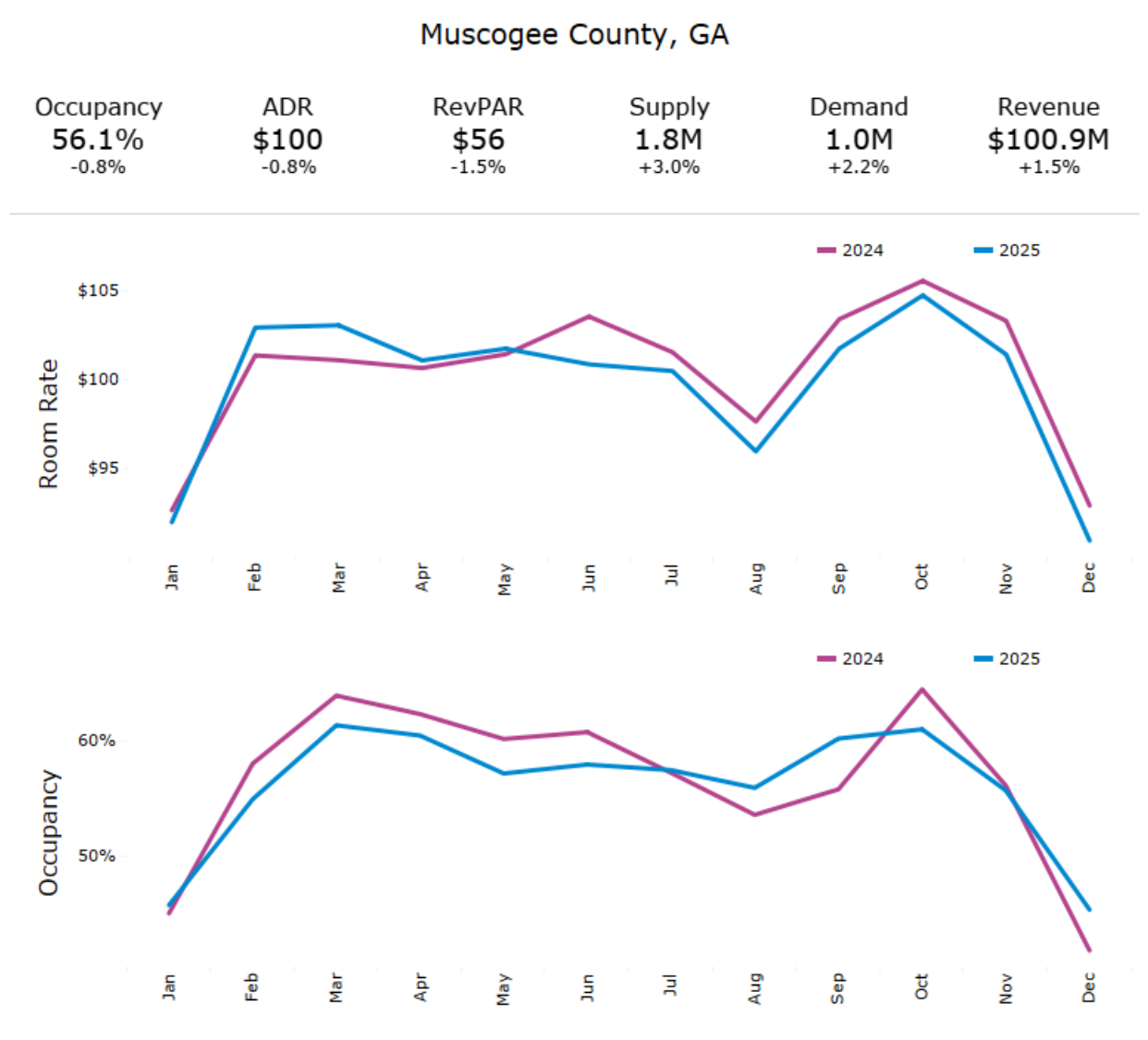


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Monthly Performance by Market

		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Oct	Muscogee County, GA	61.0%	-5.4%	\$105	-0.8%	\$64	-6.1%
	Russell County, AL	52.1%	-3.2%	\$109	-2.3%	\$57	-5.4%
Nov	Muscogee County, GA	55.7%	-0.8%	\$101	-1.8%	\$56	-2.6%
	Russell County, AL	48.1%	+6.4%	\$102	-6.6%	\$49	-0.6%
Dec	Muscogee County, GA	45.4%	+8.5%	\$91	-2.1%	\$41	+6.2%
	Russell County, AL	38.9%	-2.8%	\$92	-4.2%	\$36	-7.0%

Calendar Year-to-Date Performance



# Hotel Competitive Performance

## Monthly Performance by Market

		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
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%	
Nov	Muscogee County, GA	55.7%	-0.8%	\$101	-1.8%	\$56	-2.6%
	Albany/Southwest, GA	50.1%	-11.0%	\$98	+1.4%	\$49	-9.7%
	Athens/Gainesville, GA	53.5%	-7.9%	\$176	+5.7%	\$94	-2.6%
	Auburn-Opelika, AL	52.5%	-12.9%	\$189	+6.0%	\$99	-7.7%
	Augusta, GA	51.3%	-31.0%	\$95	-15.4%	\$49	-41.6%
	Brunswick/Kingsland, ..	53.2%	-0.6%	\$149	-0.1%	\$79	-0.7%
	Cobb County, GA	56.2%	-4.6%	\$97	-1.3%	\$55	-5.8%
	DeKalb County, GA	54.5%	-4.9%	\$97	-2.9%	\$53	-7.7%
	Gwinnett County, GA	60.6%	-5.4%	\$92	-0.9%	\$56	-6.3%
	LaGrange, GA	62.1%	+2.3%	\$129	-1.0%	\$80	+1.4%
	LaGrange, GA+	62.1%	+2.3%	\$129	-1.0%	\$80	+1.4%
	Lowndes County, GA	52.9%	-29.0%	\$101	-5.7%	\$53	-33.0%
	Macon, GA	52.1%	-4.0%	\$88	-5.0%	\$46	-8.9%
Montgomery, AL	56.6%	-10.6%	\$109	-1.3%	\$62	-11.8%	
Russell County, AL	48.1%	+6.4%	\$102	-6.6%	\$49	-0.6%	
Savannah, GA	61.7%	-9.4%	\$136	-6.6%	\$84	-15.4%	
Dec	Muscogee County, GA	45.4%	+8.5%	\$91	-2.1%	\$41	+6.2%
	Albany/Southwest, GA	44.7%	-9.2%	\$92	+1.2%	\$41	-8.1%
	Athens/Gainesville, GA	41.7%	-10.2%	\$123	-1.7%	\$51	-11.7%
	Auburn-Opelika, AL	40.0%	-13.2%	\$112	+1.6%	\$45	-11.8%
	Augusta, GA	45.9%	-21.8%	\$89	-11.7%	\$41	-31.0%
	Brunswick/Kingsland, ..	46.9%	-0.5%	\$146	+4.5%	\$69	+3.9%
	Cobb County, GA	54.1%	-2.1%	\$94	-1.8%	\$51	-3.9%
	DeKalb County, GA	52.2%	-0.6%	\$94	+0.0%	\$49	-0.6%
	Gwinnett County, GA	56.2%	-4.6%	\$86	-0.5%	\$49	-5.0%
	LaGrange, GA	62.3%	+5.7%	\$143	-3.5%	\$89	+2.1%
	LaGrange, GA+	62.3%	+5.7%	\$143	-3.5%	\$89	+2.1%
	Lowndes County, GA	48.4%	-30.8%	\$97	-7.6%	\$47	-36.1%
	Macon, GA	49.8%	+2.5%	\$83	-3.4%	\$41	-1.0%
Montgomery, AL	50.2%	-0.9%	\$104	+4.7%	\$52	+3.7%	
Russell County, AL	38.9%	-2.8%	\$92	-4.2%	\$36	-7.0%	
Savannah, GA	57.4%	-7.7%	\$127	-4.0%	\$73	-11.4%	

## Calendar Year-to-Date Performance

### Performance by Market

Occupancy	ADR	RevPAR
Savannah, GA 66.0%	Brunswick/Kingsland, GA \$161	Savannah, GA \$96
LaGrange, GA+ 64.4%	Athens/Gainesville, GA \$147	LaGrange, GA+ \$92
LaGrange, GA 64.2%	Auburn-Opelika, AL \$145	LaGrange, GA \$90
Gwinnett County, GA 62.8%	Savannah, GA \$143	Brunswick/Kingsland, GA \$90
Montgomery, AL 62.4%	LaGrange, GA+ \$116	Auburn-Opelika, AL \$84
Cobb County, GA 61.7%	Augusta, GA \$114	Athens/Gainesville, GA \$84
Lowndes County, GA 59.8%	Cobb County, GA \$113	Cobb County, GA \$71
Augusta, GA 59.3%	Montgomery, AL \$103	Montgomery, AL \$71
DeKalb County, GA 57.3%	Lowndes County, GA \$103	Augusta, GA \$69
Athens/Gainesville, GA 56.6%	DeKalb County, GA \$101	Lowndes County, GA \$64
Muscogee County, GA 56.1%	Russell County, AL \$100	DeKalb County, GA \$61
Brunswick/Kingsland, GA 55.5%	Muscogee County, GA \$97	Gwinnett County, GA \$60
Albany/Southwest, GA 52.7%	Albany/Southwest, GA \$94	Muscogee County, GA \$56
Macon, GA 52.4%	Gwinnett County, GA \$94	Albany/Southwest, GA \$51
Russell County, AL 48.0%	Macon, GA \$90	Russell County, AL \$48
		Macon, GA \$47

### % Change vs. Previous Year

Occupancy % Change	ADR % Change	RevPAR % Change
Russell County, AL +7.8%	Auburn-Opelika, AL +5.7%	Lowndes County, GA +6.5%
Lowndes County, GA -0.6%	Athens/Gainesville, GA +5.6%	Russell County, AL +1.8%
LaGrange, GA+ -0.7%	Lowndes County, GA +3.2%	Auburn-Opelika, AL +0.7%
Montgomery, AL -0.8%	Albany/Southwest, GA +2.4%	Montgomery, AL -0.7%
Muscogee County, GA -0.9%	Cobb County, GA +2.2%	Cobb County, GA -1.3%
Brunswick/Kingsland, GA -1.0%	Augusta, GA +1.4%	Brunswick/Kingsland, GA -1.4%
LaGrange, GA -2.1%	Montgomery, AL +1.0%	Athens/Gainesville, GA -1.5%
Macon, GA -2.7%	Gwinnett County, GA -0.4%	Muscogee County, GA -1.7%
Gwinnett County, GA -3.0%	Brunswick/Kingsland, GA -0.8%	Gwinnett County, GA -1.8%
DeKalb County, GA -3.1%	Muscogee County, GA -0.8%	Albany/Southwest, GA -1.9%
Auburn-Opelika, AL -3.7%	Macon, GA -0.8%	Augusta, GA -2.8%
	DeKalb County, GA -2.1%	LaGrange, GA+ -2.9%
	Augusta, GA -4.1%	Macon, GA -3.3%
	Albany/Southwest, GA -4.9%	LaGrange, GA -3.9%
	Savannah, GA -6.0%	DeKalb County, GA -8.0%
	Athens/Gainesville, GA -6.7%	Savannah, GA -8.0%

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Monthly Performance by Market

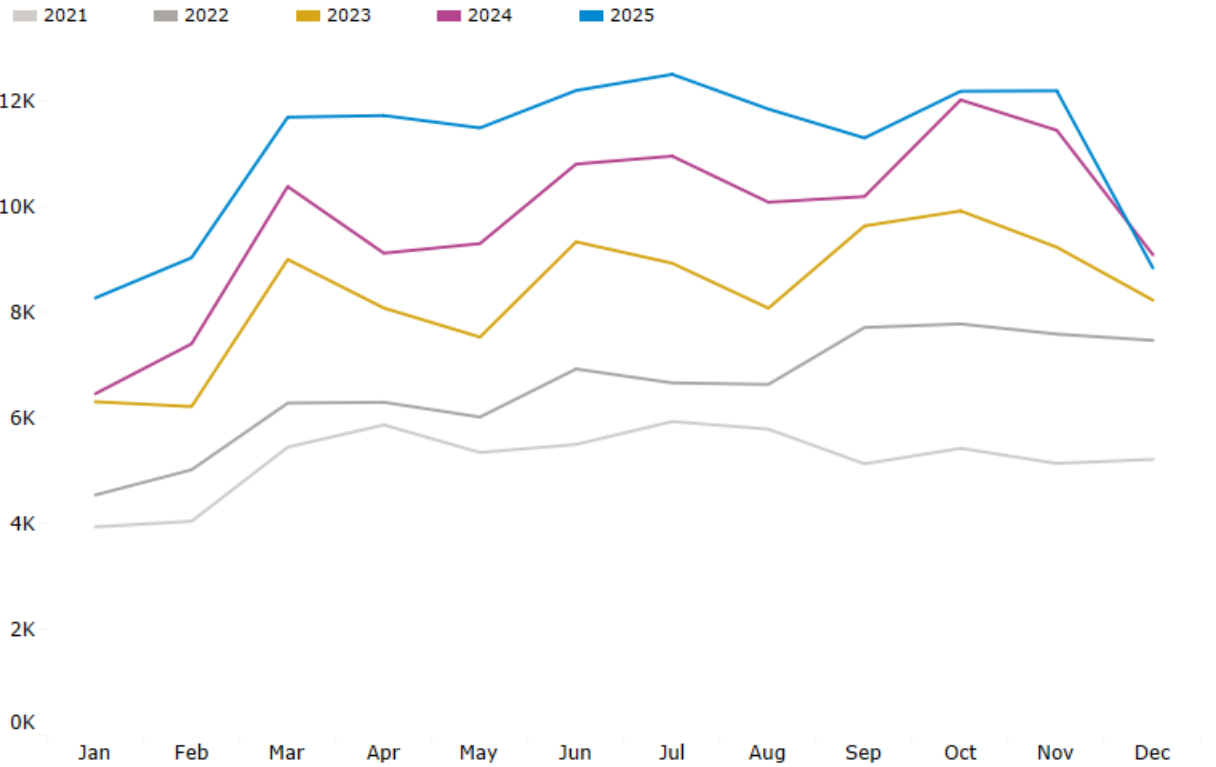
		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Oct	Columbus	60.9%	-12.3%	\$170	+9.1%	\$104	-4.4%
Nov	Columbus	61.9%	-6.3%	\$175	+9.4%	\$108	+2.6%
Dec	Columbus	45.0%	-11.6%	\$153	+7.4%	\$69	-5.0%

Calendar Year-to-Date Performance

Columbus All Properties					
Occupancy	ADR	RevPAR	Supply	Demand	Revenue
59.4%	\$165	\$98	224.0K	133.0K	\$22.0M
-5.0%	+12.2%	+6.5%	+19.7%	+13.7%	+27.5%

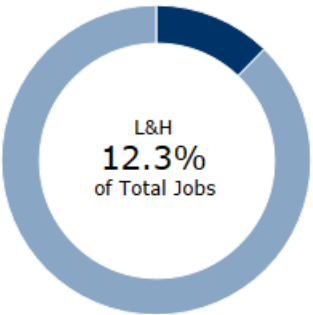
Short Term Rental Demand by Month

Last Five Calendar Years



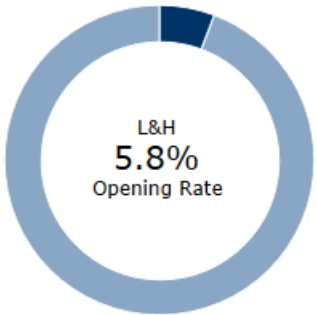
Total Leisure & Hospitality Jobs

L&H Jobs  
as of December 2025  
**15.3K**  
+1.3% YOY | +0.0% vs. 2019

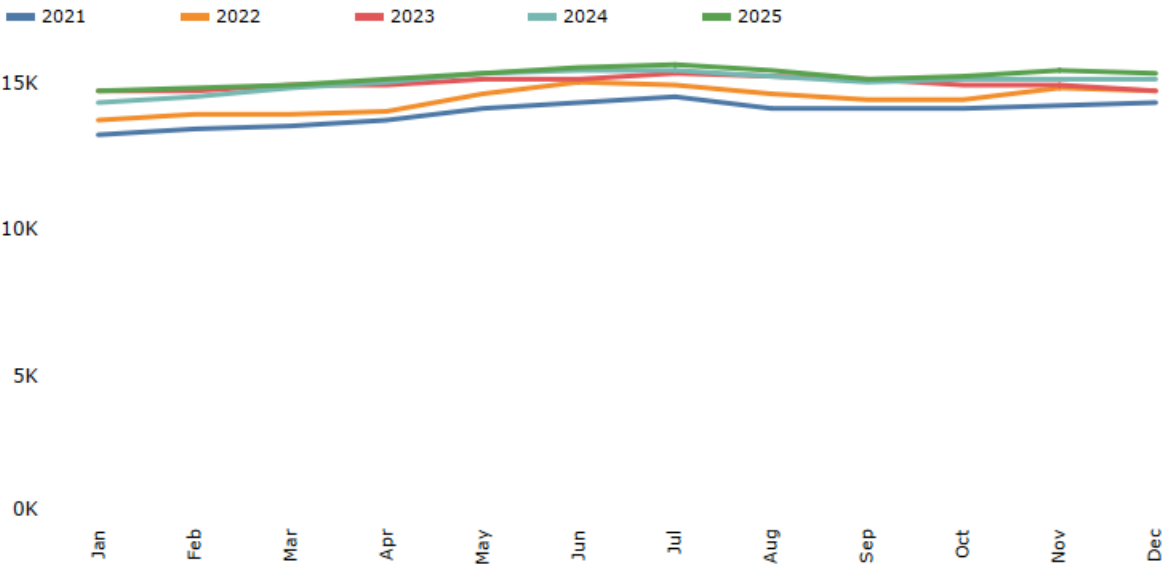


Leisure & Hospitality Job Openings

L&H Job Openings  
as of November 2025  
**940**  
+4.7% YOY | +11.2% vs. 2019



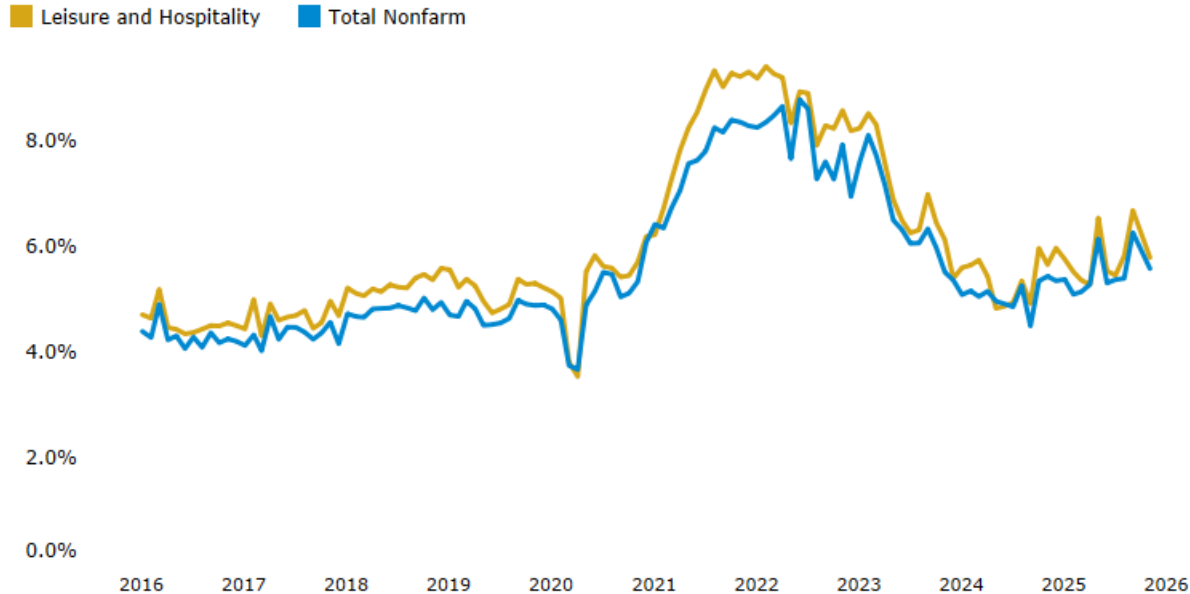
Employment Recovery  
Leisure & Hospitality Jobs (Thousands)



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

December 2025 Volume

2.6M

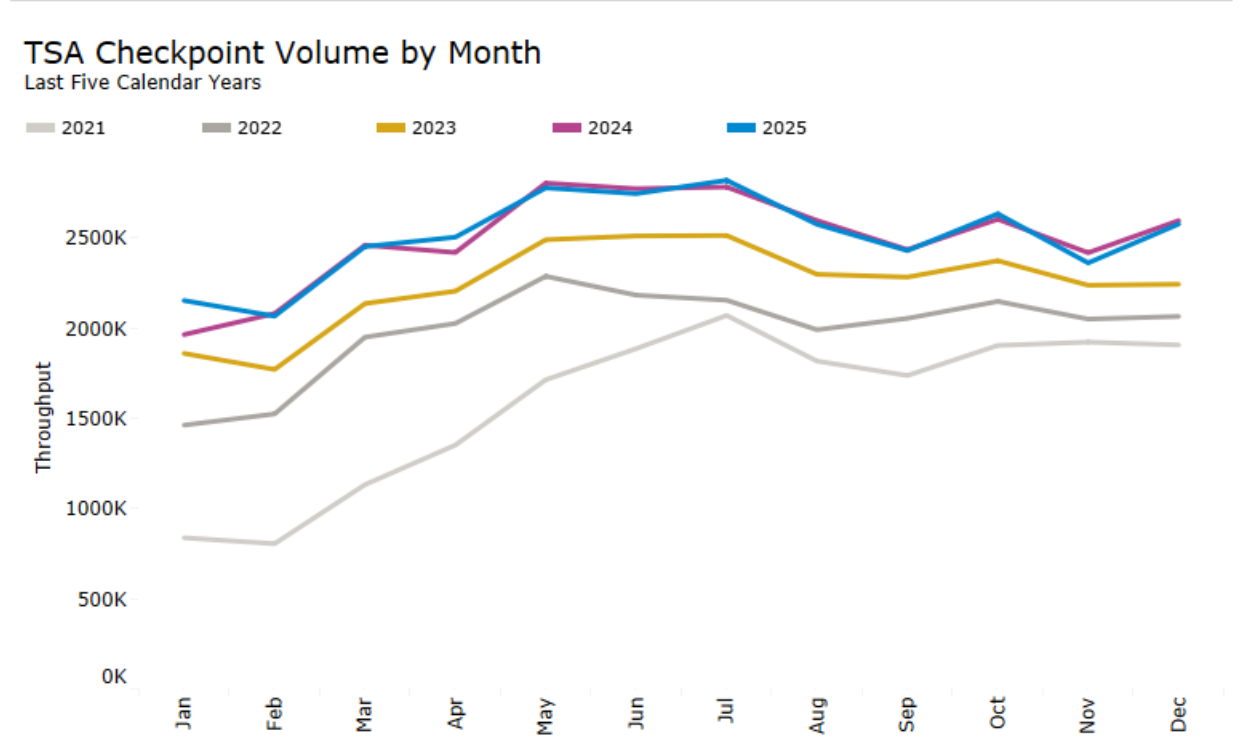
-0.7% YOY

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

Jan - Dec 2025 Volume

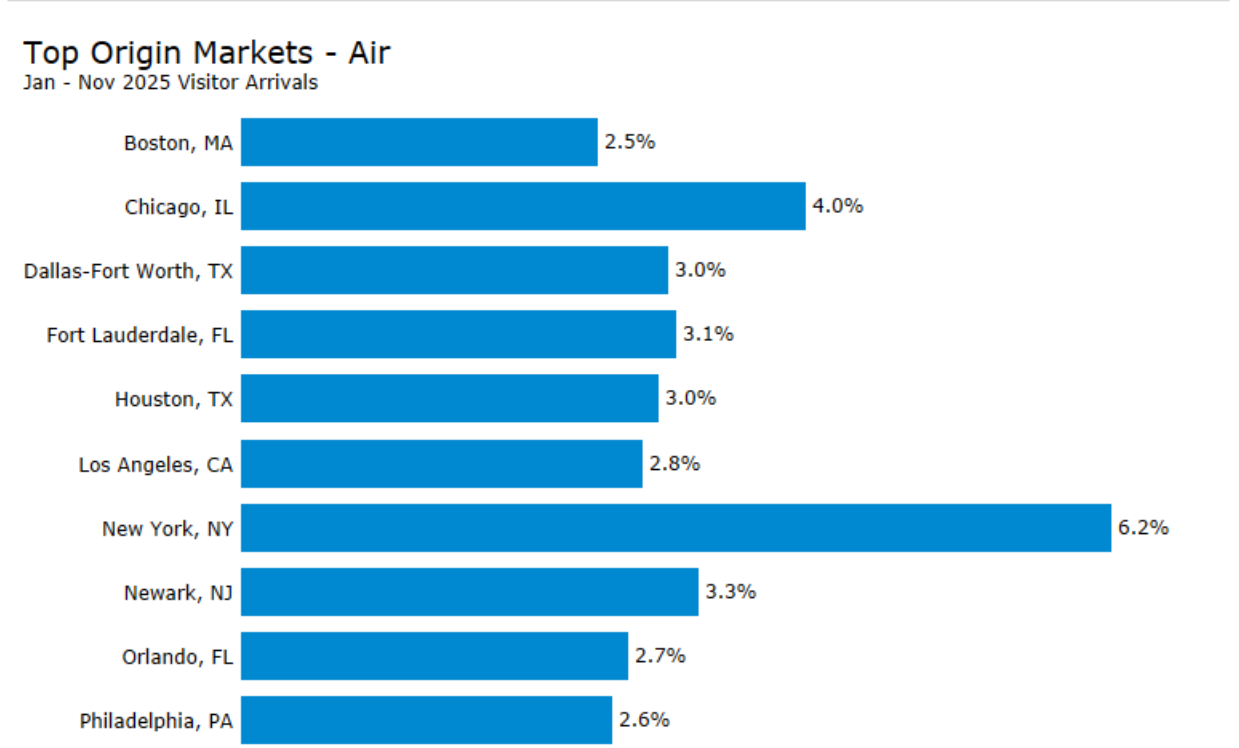
30.1M

+0.5% YOY



Source: Transportation Security Administration

Source: Transportation Security Administration

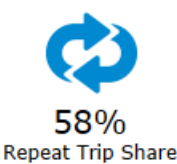
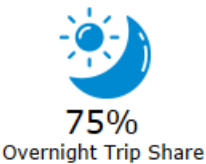


Source: OAG



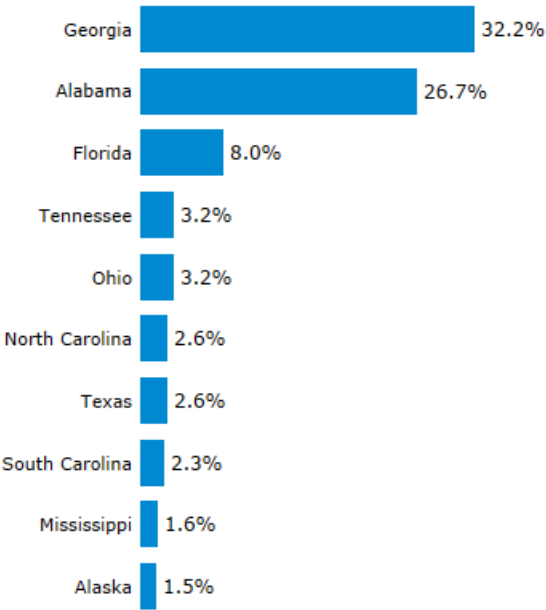


December 2025 Domestic Visits

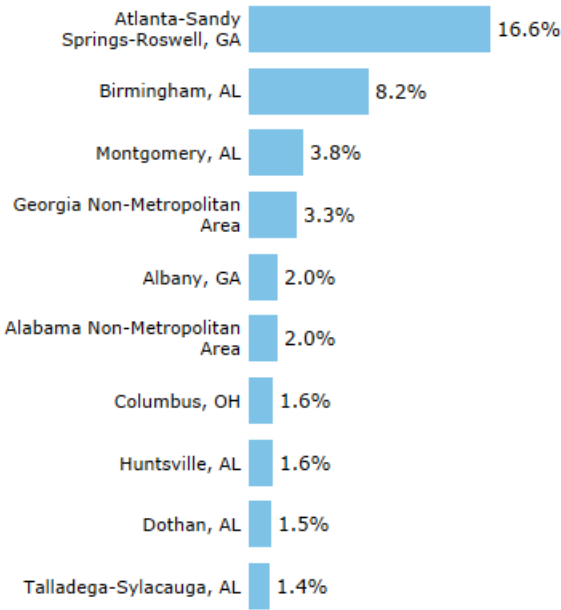


Top Origin Markets

States

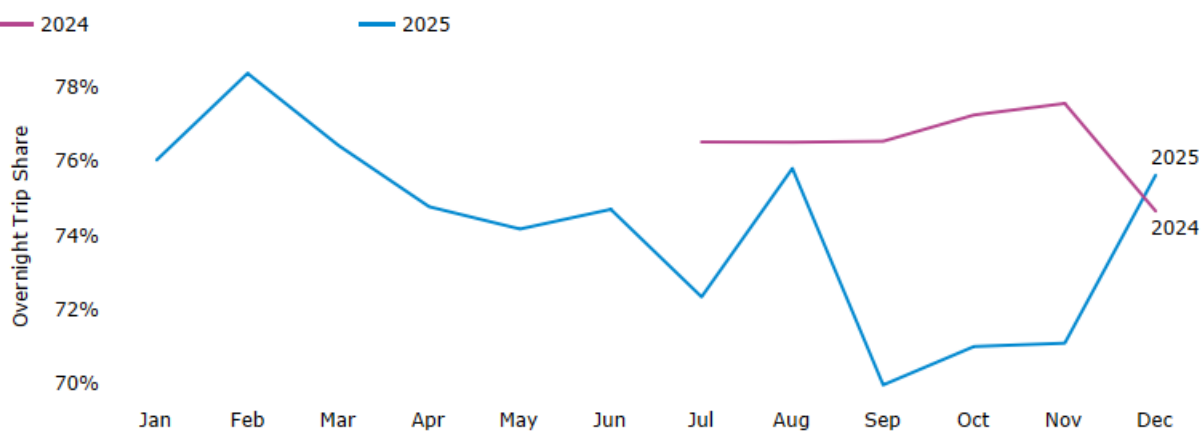


MSA

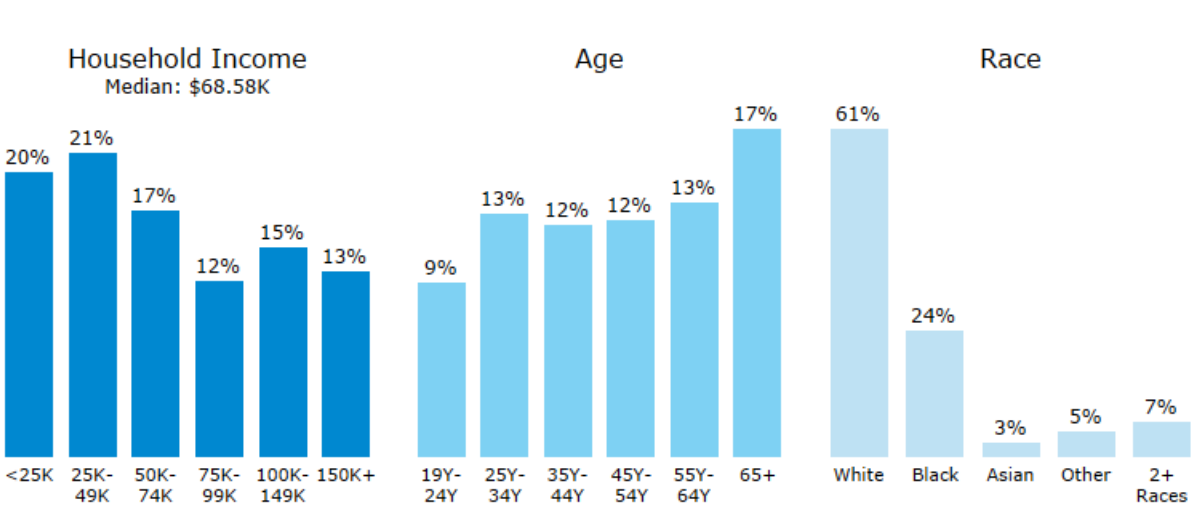


Domestic Visitor Trends & Characteristics

Overnight Trip Share by Month

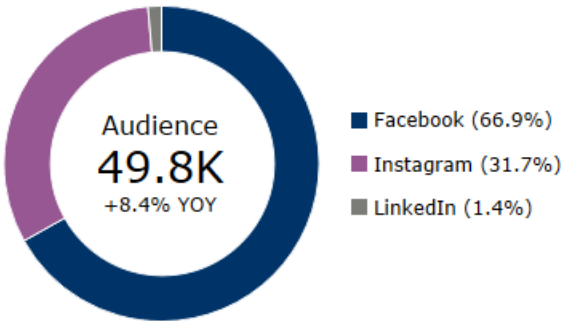


December 2025 Visitor Origin Demographics

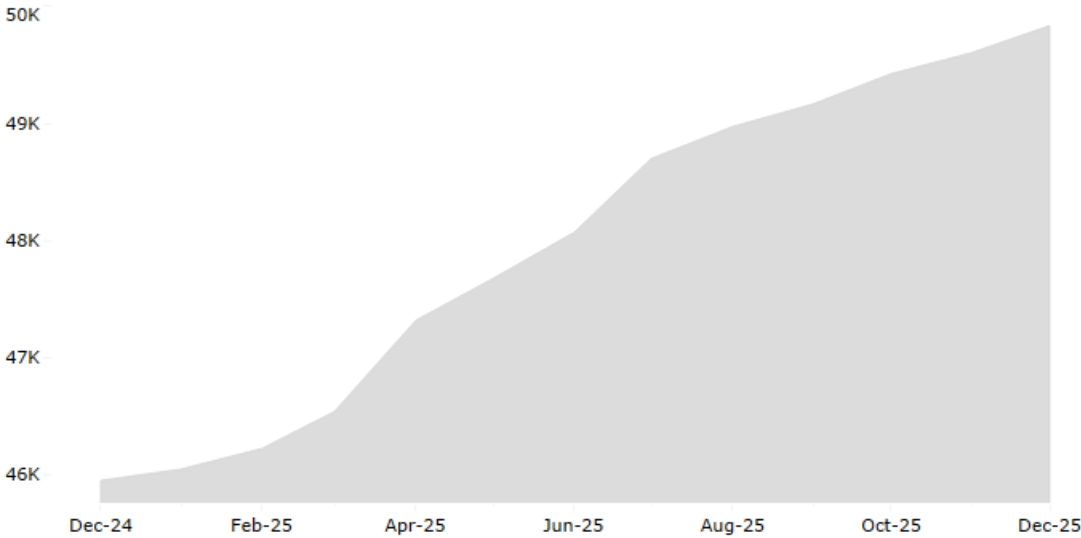




Audience Overview



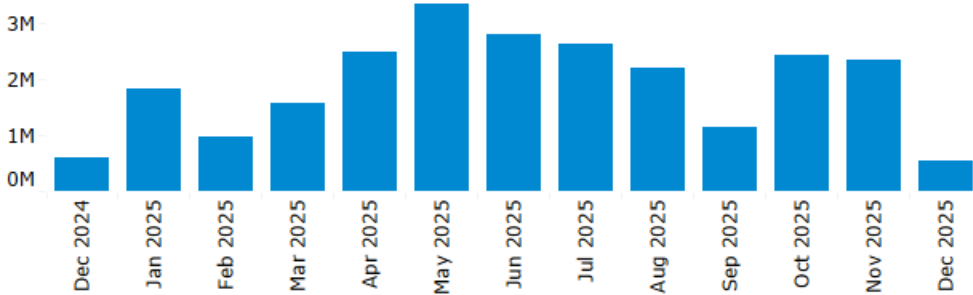
Audience by Month



Engagements & Impressions

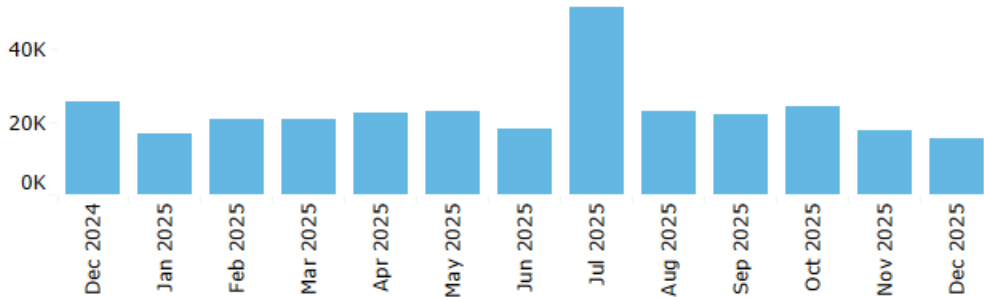
Impressions

December 2025  
527.9K  
-9.7% YOY



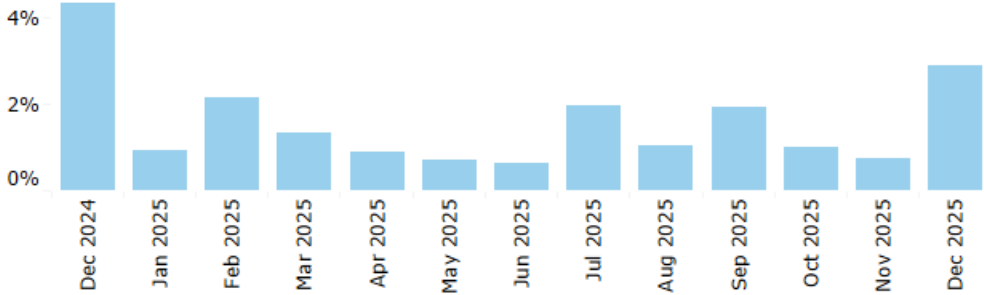
Engagements

December 2025  
15.4K  
-39.6% YOY



Engagement Rate

December 2025  
2.9%  
-1.4% pt YOY



# Website Performance Summary

December 2025 | Properties: All



Users  
**26.5K**  
-26.3% YOY



Sessions  
**29.4K**  
-26.1% YOY



Engaged Sessions  
**9.3K**  
-41.0% YOY



Engagement Rate  
**31.7%**  
-8.02% pt YOY



Page Views  
**37.9K**  
-49.9% YOY



Pages Per Session  
**1.29 pages**  
-0.61 pages YOY



Avg. Session Duration  
**00:01:06**  
-10 sec YOY

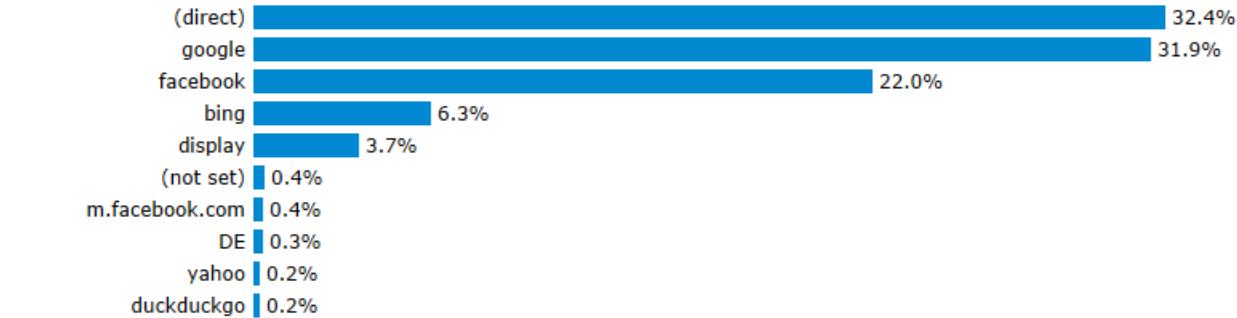


Bounce Rate  
**68.3%**  
+8.02% pt YOY

## Campaigns

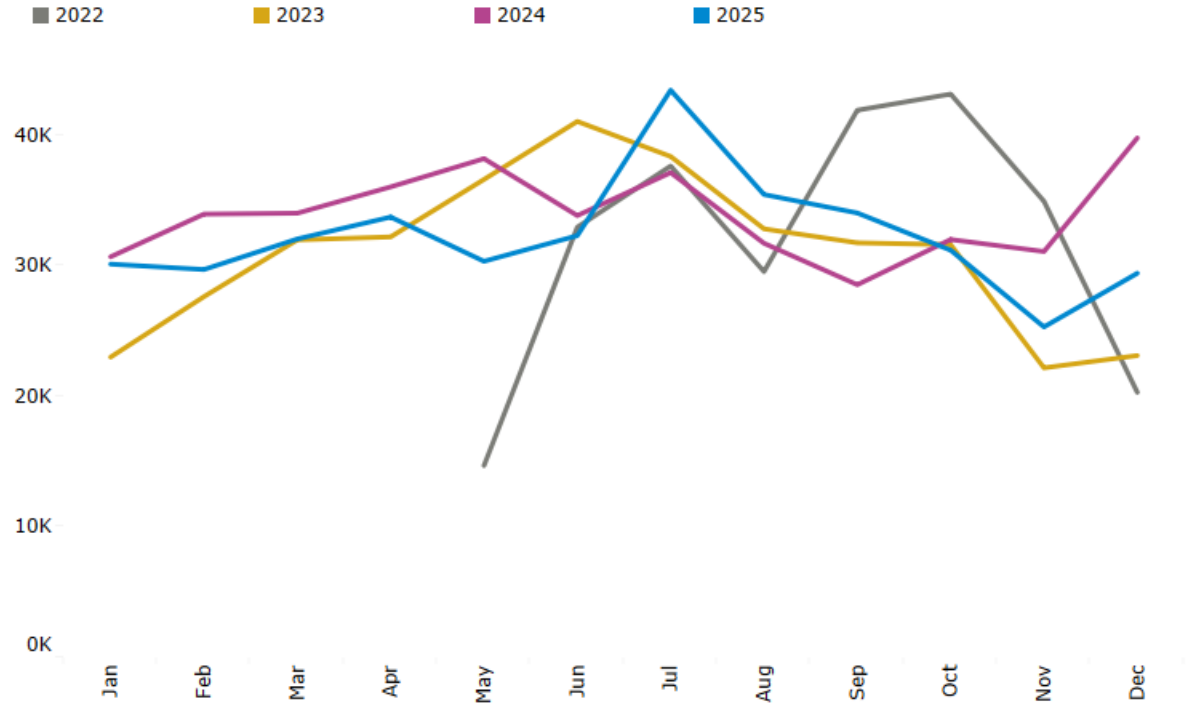


## Sources



## 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

December 2025



## Facebook



Audience  
33.3K  
+4.9% YOY

Engagement Rate	3.4%
Impressions	411,850
Video Views	53,873
Engagements	13,885
Comments	208
Reactions	1,685
Shares	107
Post Link Clicks	6,486
Other Post Clicks	5,399

## Instagram



Audience  
15.8K  
+11.5% YOY

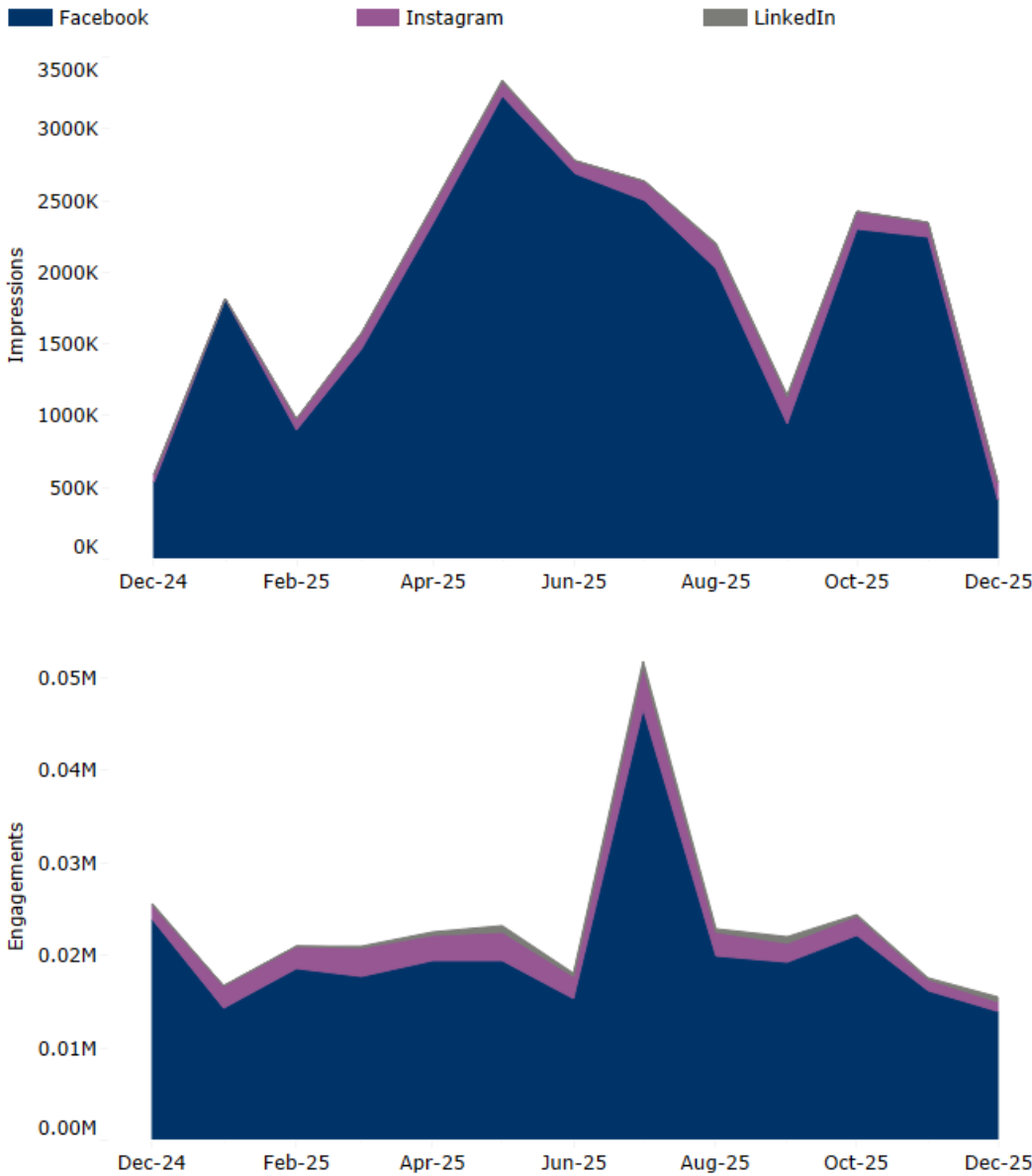
Engagement Rate	0.9%
Impressions	112,922
Video Views	1,497
Engagements	1,059
Comments	57
Reactions	888
Saves	
Shares	91

## LinkedIn



Audience  
681

Engagement Rate	13.4%
Impressions	3,164
Video Views	0
Engagements	425
Comments	39
Reactions	197
Shares	4
Post Link Clicks	



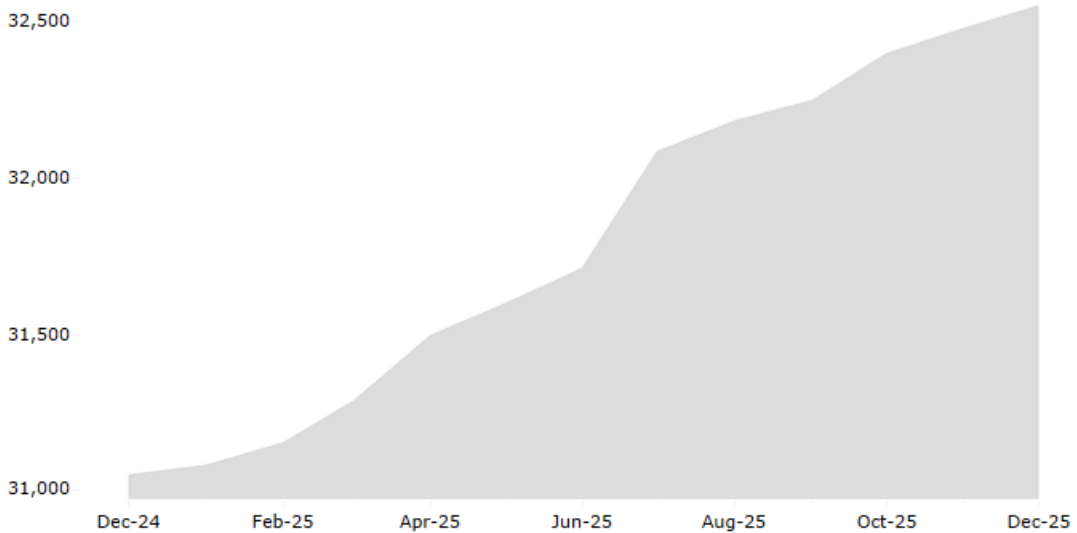




Audience Overview

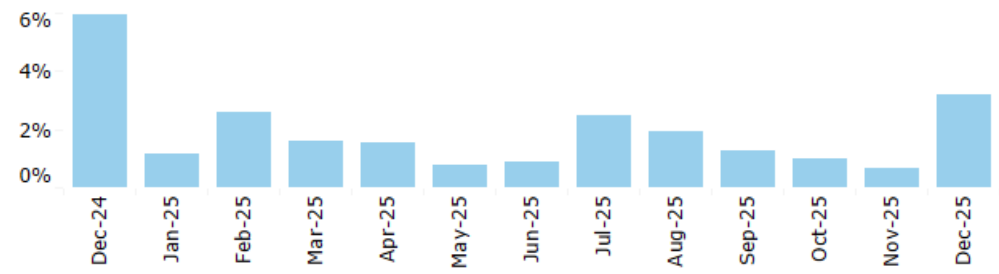
Audience  
December 2025  
**32.5K**  
+4.8% YOY

Audience by Month

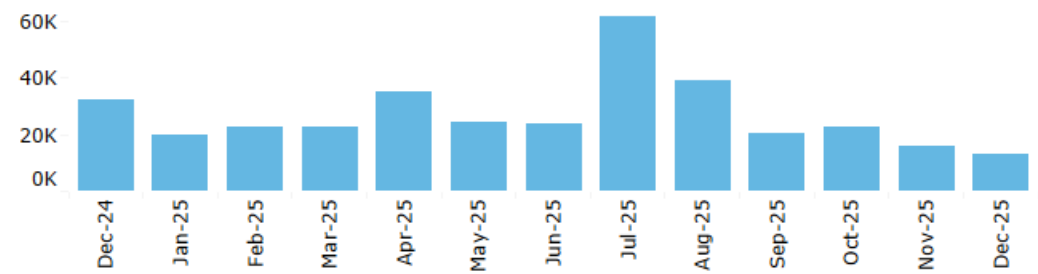


Engagements & Impressions

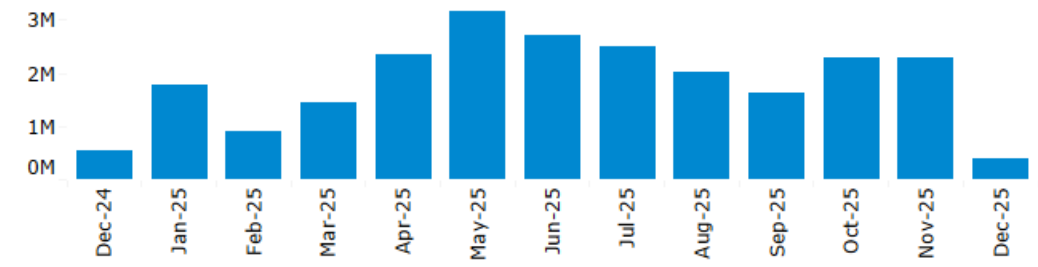
Engagement  
Rate  
December 2025  
**3.2%**  
-2.7% pt YOY



Engagements  
December 2025  
**12.8K**  
-60.7% YOY

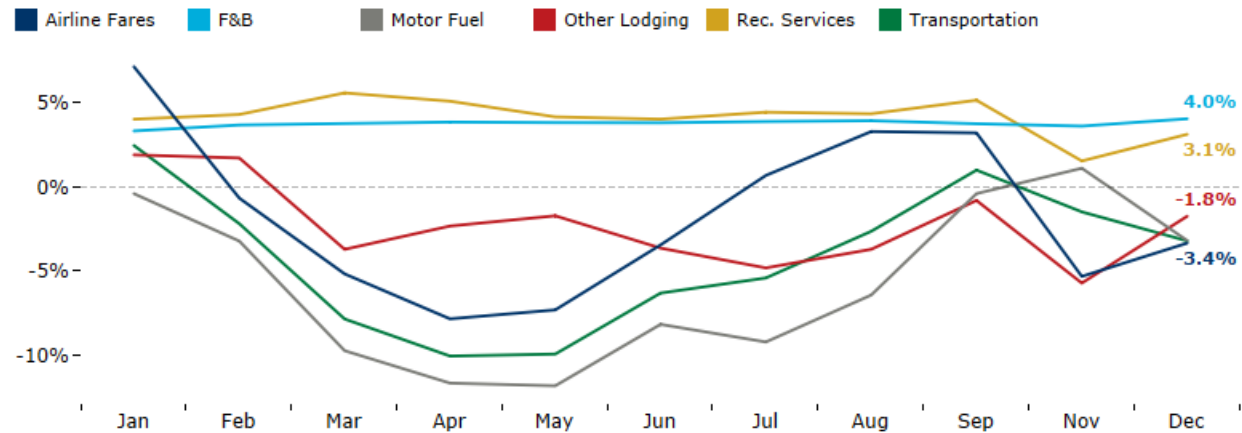


Total  
Impressions  
December 2025  
**390.2K**  
-29.8% YOY



Travel Price Index

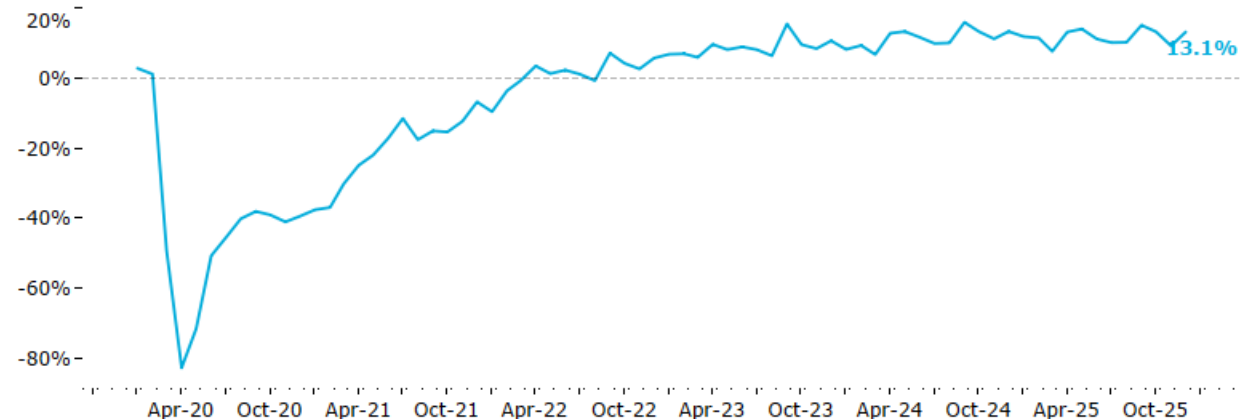
% Change Relative to Same Month in Previous Year | Last 12 Months



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

Travel Spending (% change vs 2019)

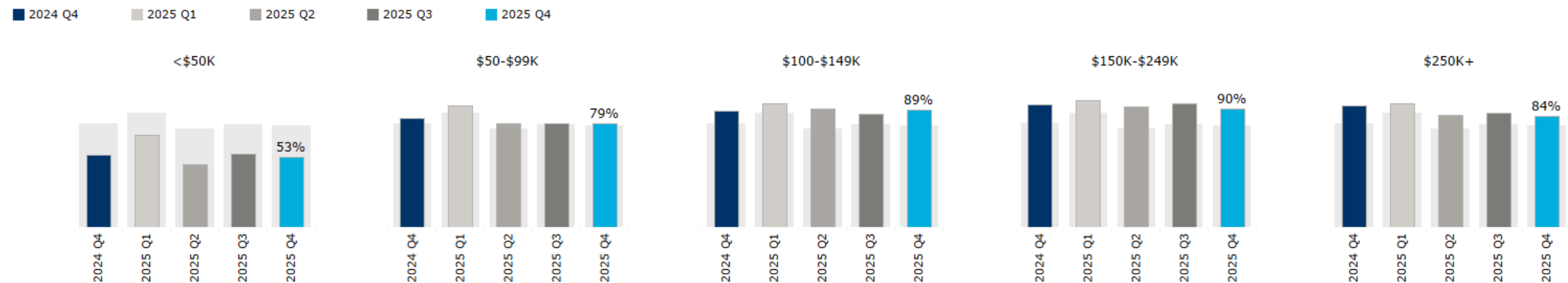
% Change vs. 2019 | U.S. total



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

Planning Leisure Travel Within the Next 12 Months

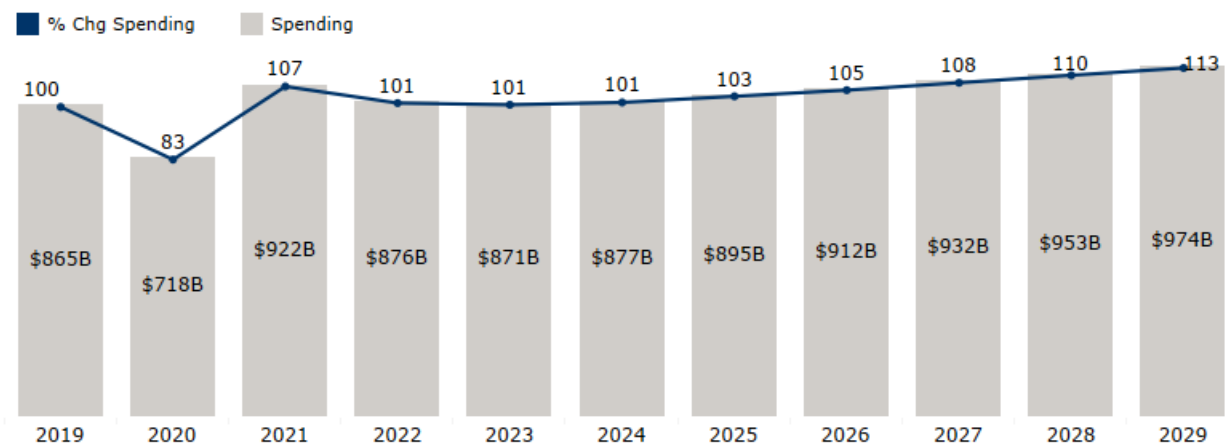
% of American Consumers Planning Travel by Household Income (Calendar Year)



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

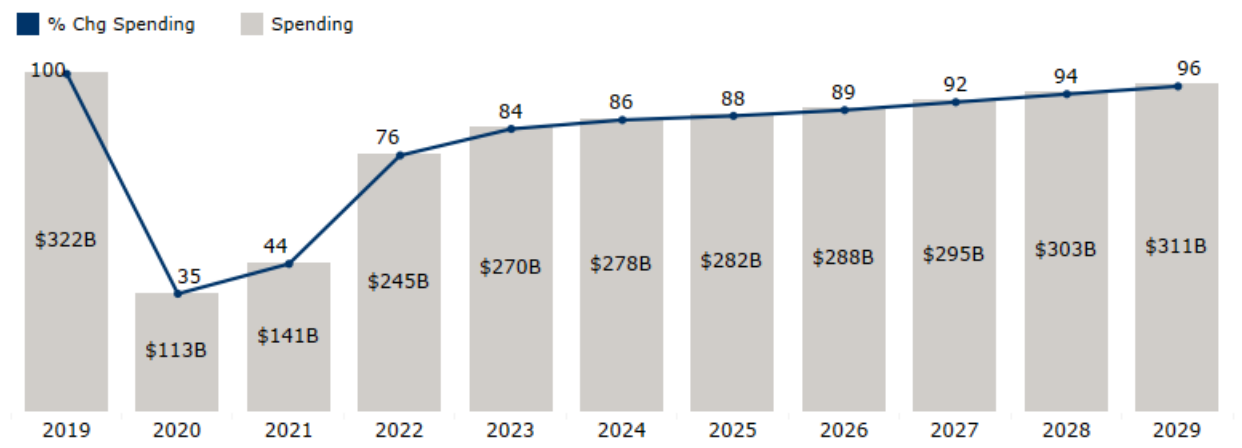
## Real Domestic Leisure Travel Spending

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



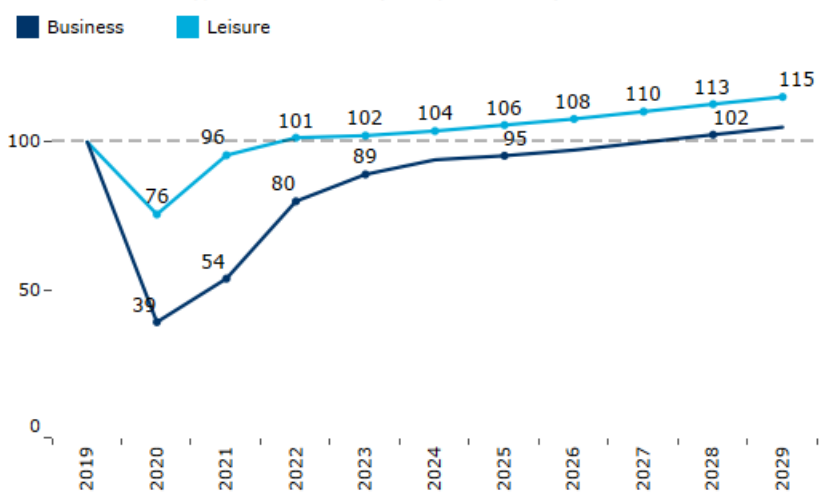
## Real Domestic Business Travel Spending

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



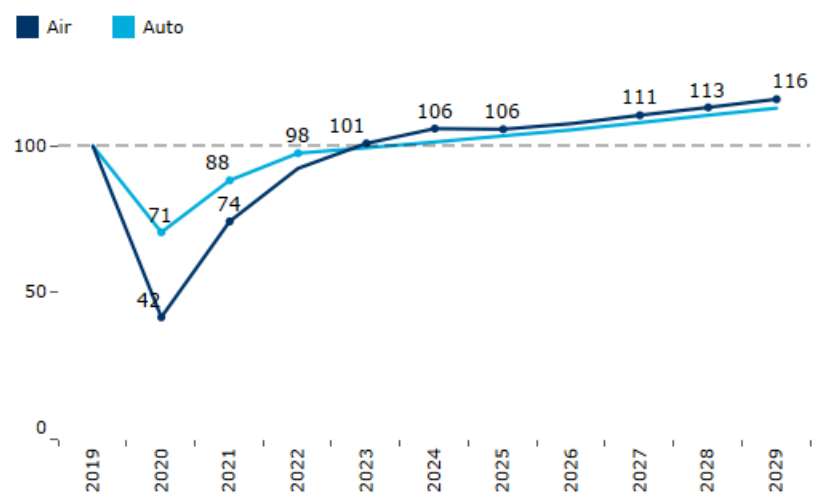
## Leisure vs. Business Travel Volume

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



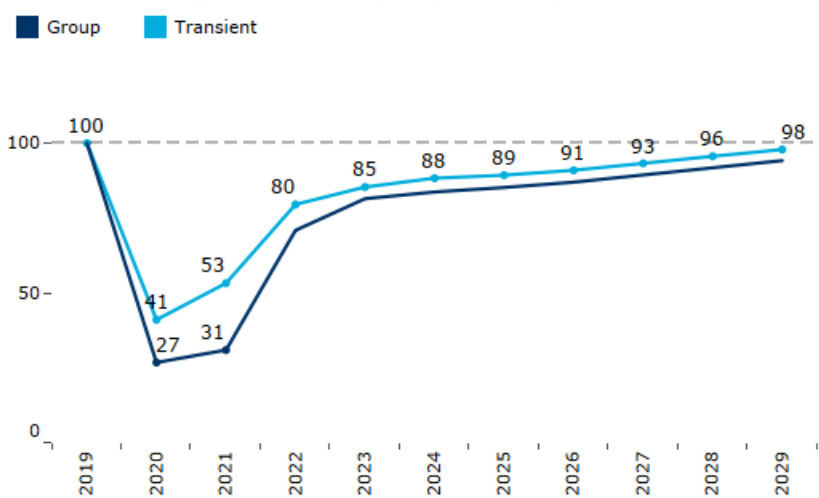
## Auto vs. Air Travel Volume

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

