



Monthly Summary Report

January 2026



Highlights

Demand for Columbus hotels in January was +0.3% YOY more than last year and rooms to fill was -0.1% YOY less resulting in a +0.4% YOY gain in occupancy to 45.9%. In contrast, short term rental demand decreased -11.1% and supply was up +0.9% YOY causing a -11.9% YOY drop in occupancy to 44.1%.

Hotel ADR was -0.9% YOY less than last year at \$91 causing a -0.7% YOY decline in revenue to \$6.4M for the month. Short term rental ADR was +0.5% YOY higher than last year at \$140 but the decline in demand caused a -10.6% YOY drop in revenue to \$1M for the month.

Marketing metrics in January performed well illustrated by a +132.3% YOY increase in website sessions to 69.9K, Social Media audience gaining +9% YOY to 50.2K, and the Facebook audience up +5.2% YOY to 32.7K.

U.S. job growth rebounded in January, with 130,000 jobs added, well above the 2025 monthly average of 49,000 jobs. Combined with a stable labor force participation rate, the stronger job growth pushed the unemployment rate down to 4.3%, while 12-month inflation eased to 2.4%.

USTA's Travel Price Index indicates U.S. travel remains relatively affordable compared to the broader economy. In January, travel prices rose 0.3% YOY, compared to 2.4% overall inflation. Hotel (-3.2%) and gas (-7.3%) prices fell, while F&B (+4.0%), airfares (+2.2%), and recreation (+2.0%) increased



Hotel Demand
70.1K
+0.3% YOY

Source: STR



Hotel ADR
\$91.13
-0.9% YOY

Source: STR



ATL Checkpoint Volume
2.2M
+0.6% YOY

Source: TSA



Social Media Audience
50.2K
+9.0% YOY

Source: Sprout Social



Facebook Audience
32.7K
+5.2% YOY

Source: Meta



Website Sessions
69.9K
+132.3% YOY

Source: Google Analytics



Overnight Trip Share
79%

Source: Azira



L&H Jobs
15.3K
+1.3% YOY
(As of December 2025)

Source: Bureau of Labor Statistics

Lodging Summary

Muscogee County, GA | January 2026 and Calendar Year-to-Date Performance

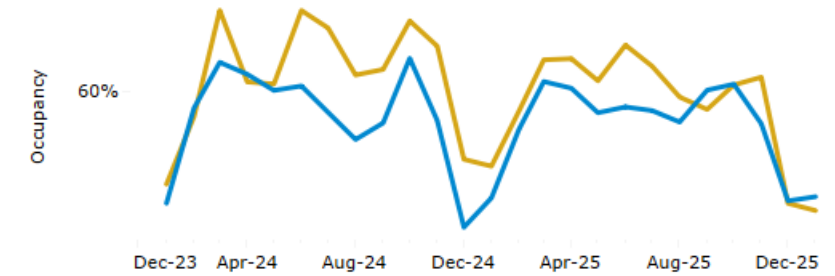
Aggregate Lodging Performance

Sources: STR & AirDNA

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Jan 2026	45.7%	\$95.76	\$43.81	169.3K	77.4K	\$7.4M
YOY % Change	-0.9% YOY	-1.3% YOY	-2.2% YOY	+0.0% YOY	-0.9% YOY	-2.2% YOY
Year-to-Date	45.7%	\$95.76	\$43.81	169.3K	77.4K	\$7.4M
YTD YOY % Change	-0.9% YOY	-1.3% YOY	-2.2% YOY	+0.0% YOY	-0.9% YOY	-2.2% YOY

Occupancy by Month

Hotels Short Term Vacation Rentals



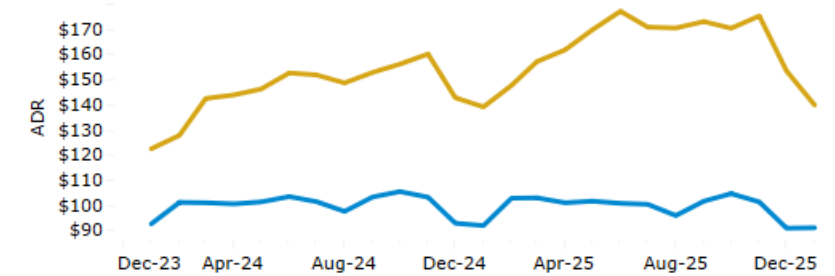
Hotel Performance

Source: STR

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Jan 2026	45.9%	\$91.13	\$41.85	152.6K	70.1K	\$6.4M
YOY % Change	+0.4% YOY	-0.9% YOY	-0.6% YOY	-0.1% YOY	+0.3% YOY	-0.7% YOY
Year-to-Date	45.9%	\$91.13	\$41.85	152.6K	70.1K	\$6.4M
YTD YOY % Change	+0.4% YOY	-0.9% YOY	-0.6% YOY	-0.1% YOY	+0.3% YOY	-0.7% YOY

ADR by Month

Hotels Short Term Vacation Rentals



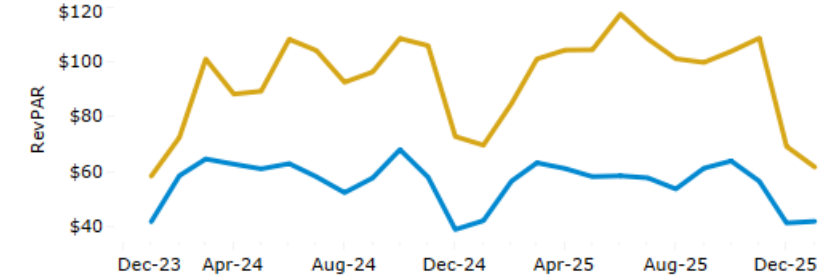
Short Term Vacation Rental Performance

Source: AirDNA (All Properties)

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Jan 2026	44.1%	\$139.97	\$61.69	16.7K	7.3K	\$1.0M
YOY % Change	-11.9% YOY	+0.5% YOY	-11.4% YOY	+0.9% YOY	-11.1% YOY	-10.6% YOY
Year-to-Date	44.1%	\$139.97	\$61.69	16.7K	7.3K	\$1.0M
YTD YOY % Change	-11.9% YOY	+0.5% YOY	-11.4% YOY	+0.9% YOY	-11.1% YOY	-10.6% YOY

RevPAR by Month

Hotels Short Term Vacation Rentals



Hotel Review

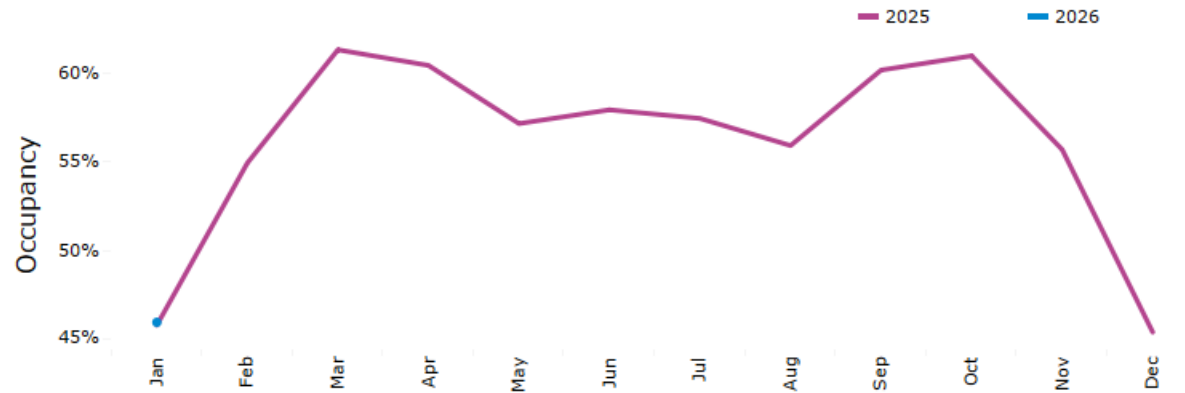
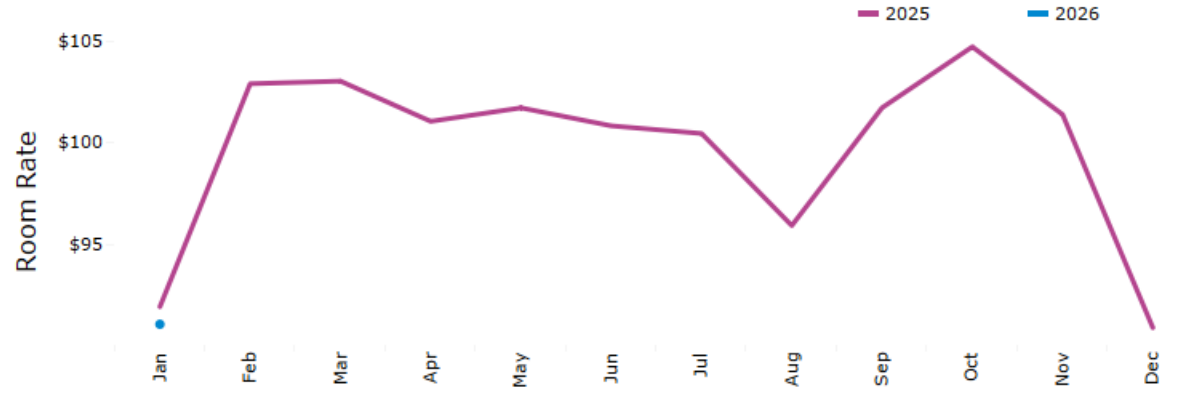
Monthly Performance by Market

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG	
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%
Jan	Muscogee County, GA	45.9%	+0.4%	\$91	-0.9%	\$42	-0.6%
	Russell County, AL	39.1%	+15.5%	\$91	-4.7%	\$36	+10.0%

Calendar Year-to-Date Performance

Muscogee County, GA

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
45.9%	\$91	\$42	152.6K	70.1K	\$6.4M
+0.4%	-0.9%	-0.6%	-0.1%	+0.3%	-0.7%



Hotel Competitive Performance

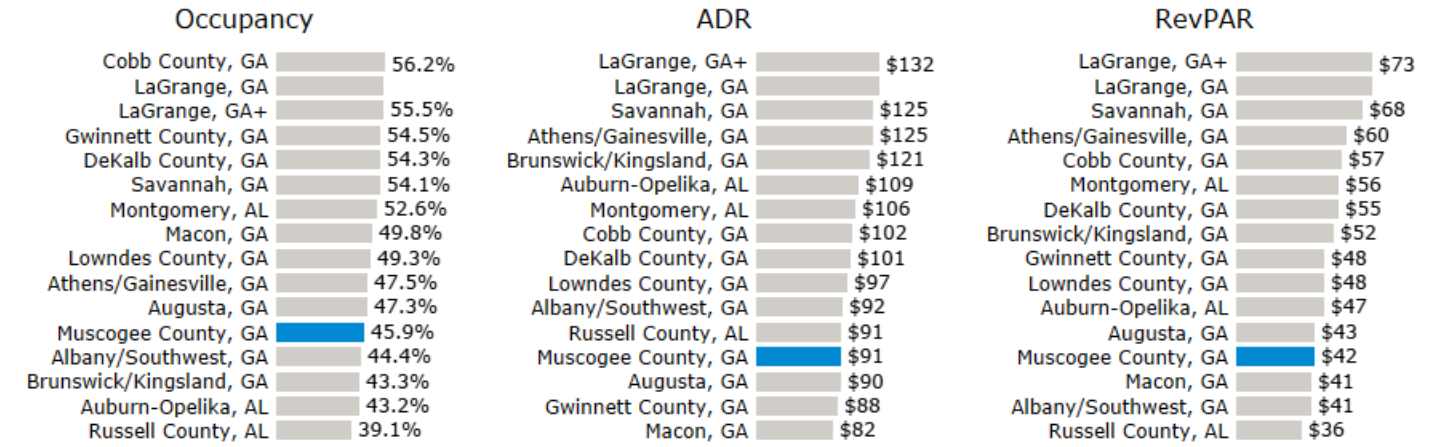
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Monthly Performance by Market

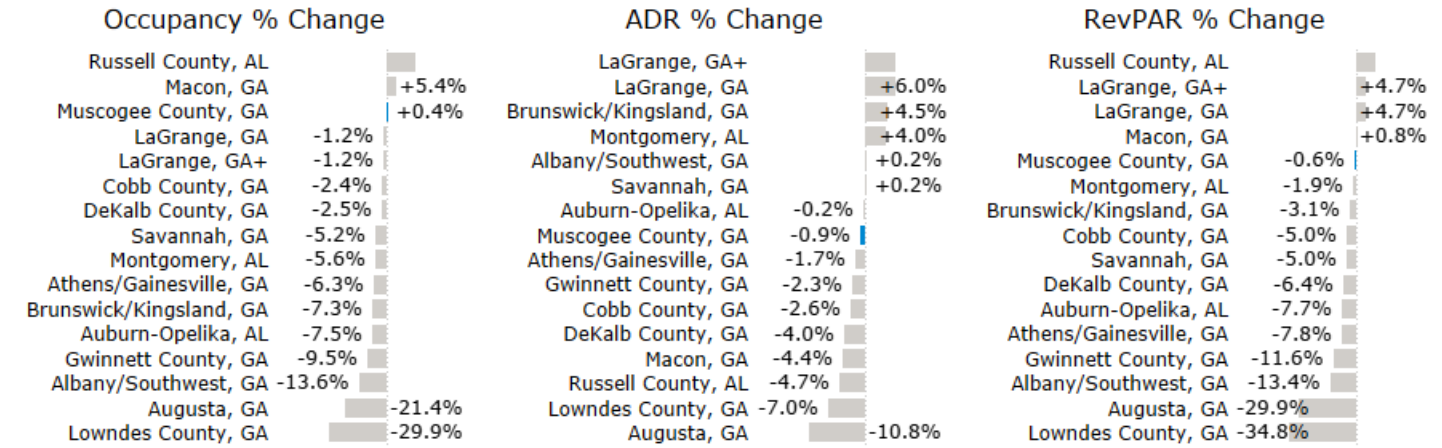
	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Nov						
Muscogee County, GA	55.7%	-0.8%	\$101	-1.8%	\$56	-2.6%
Albany/Southwest, GA	50.1%	-11.0%	\$98	+1.4%	\$49	-9.7%
Athens/Gainesville, GA	53.5%	-7.9%	\$176	+5.7%	\$94	-2.6%
Auburn-Opelika, AL	52.5%	-12.9%	\$189	+6.0%	\$99	-7.7%
Augusta, GA	51.3%	-31.0%	\$95	-15.4%	\$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%
Jan						
Muscogee County, GA	45.9%	+0.4%	\$91	-0.9%	\$42	-0.6%
Albany/Southwest, GA	44.4%	-13.6%	\$92	+0.2%	\$41	-13.4%
Athens/Gainesville, GA	47.5%	-6.3%	\$125	-1.7%	\$60	-7.8%
Auburn-Opelika, AL	43.2%	-7.5%	\$109	-0.2%	\$47	-7.7%
Augusta, GA	47.3%	-21.4%	\$90	-10.8%	\$43	-29.9%
Brunswick/Kingsland, ..	43.3%	-7.3%	\$121	+4.5%	\$52	-3.1%
Cobb County, GA	56.2%	-2.4%	\$102	-2.6%	\$57	-5.0%
DeKalb County, GA	54.3%	-2.5%	\$101	-4.0%	\$55	-6.4%
Gwinnett County, GA	54.5%	-9.5%	\$88	-2.3%	\$48	-11.6%
LaGrange, GA	55.5%	-1.2%	\$132	+6.0%	\$73	+4.7%
LaGrange, GA+	55.5%	-1.2%	\$132	+6.0%	\$73	+4.7%
Lowndes County, GA	49.3%	-29.9%	\$97	-7.0%	\$48	-34.8%
Macon, GA	49.8%	+5.4%	\$82	-4.4%	\$41	+0.8%
Montgomery, AL	52.6%	-5.6%	\$106	+4.0%	\$56	-1.9%
Russell County, AL	39.1%	+15.5%	\$91	-4.7%	\$36	+10.0%
Savannah, GA	54.1%	-5.2%	\$125	+0.2%	\$68	-5.0%

Calendar Year-to-Date Performance

Performance by Market



% Change vs. Previous Year



Short Term Rental Review

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Monthly Performance by Market

		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Nov	Columbus	61.9%	-6.3%	\$175	+9.5%	\$109	+2.6%
Dec	Columbus	45.0%	-11.6%	\$154	+7.5%	\$69	-5.0%
Jan	Columbus	44.1%	-11.9%	\$140	+0.5%	\$62	-11.4%

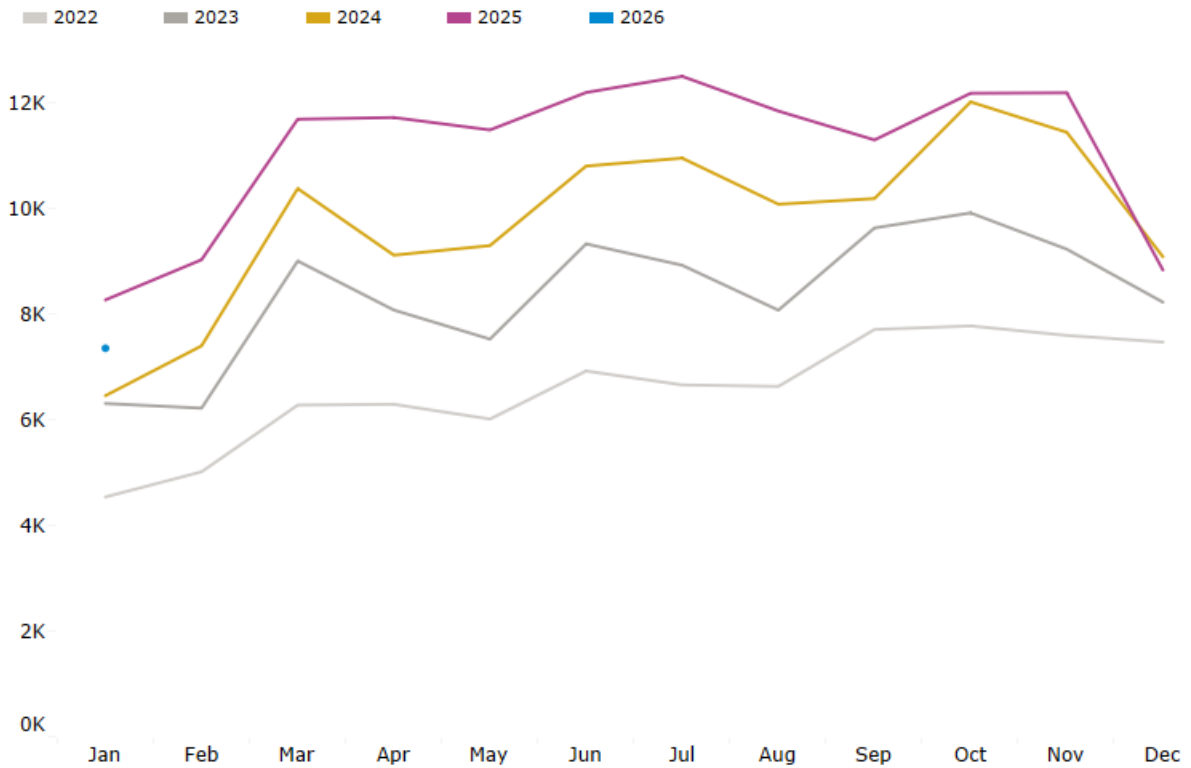
Calendar Year-to-Date Performance

Columbus
All Properties

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
44.1%	\$140	\$62	16.7K	7.3K	\$1.0M
-11.9%	+0.5%	-11.4%	+0.9%	-11.1%	-10.6%

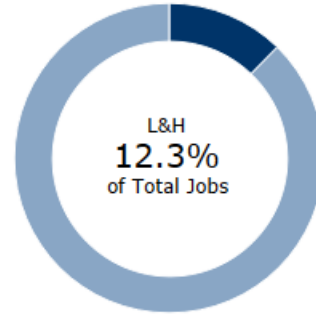
Short Term Rental Demand by Month

Last Five Calendar Years



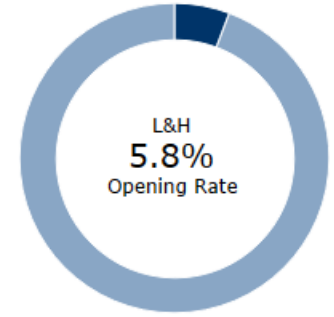
Total Leisure & Hospitality Jobs

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



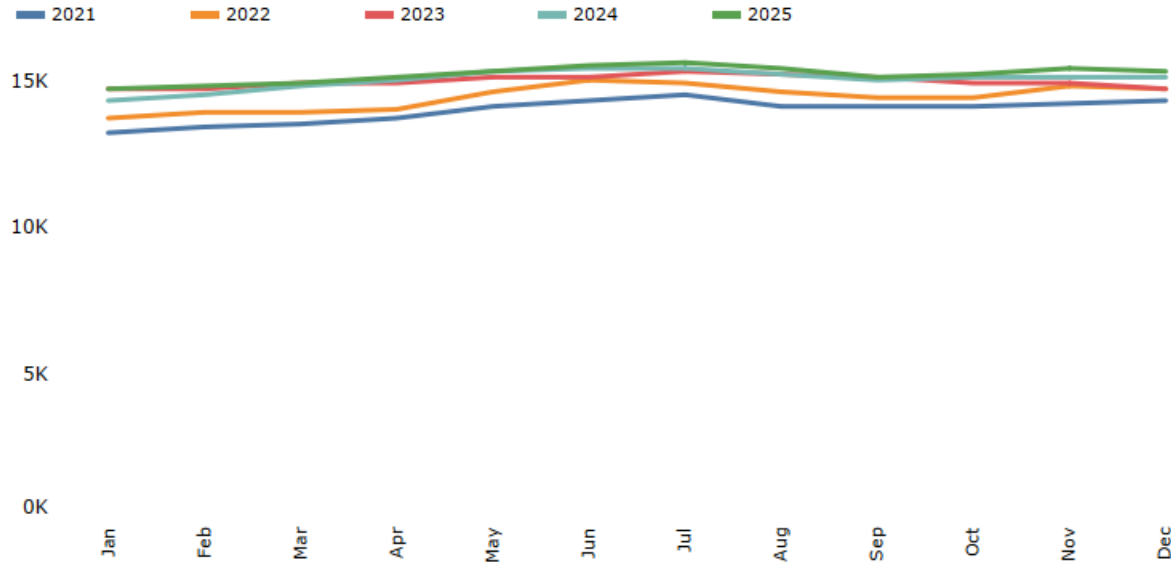
Leisure & Hospitality Job Openings

L&H Job Openings
as of November 2025
940
+0.0% YOY | +11.2% vs. 2019



Employment Recovery

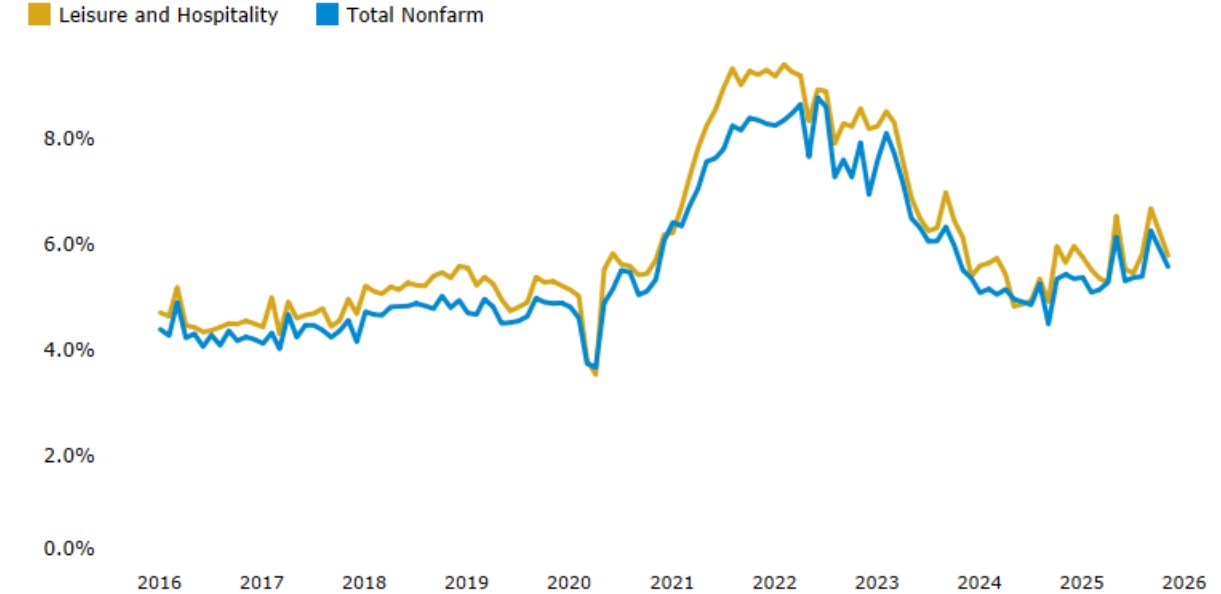
Leisure & Hospitality Jobs (Thousands)



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

January 2026 Volume

2.2M

+0.6% YOY

Year-to-Date TSA Checkpoint Volume & Visitor Origins

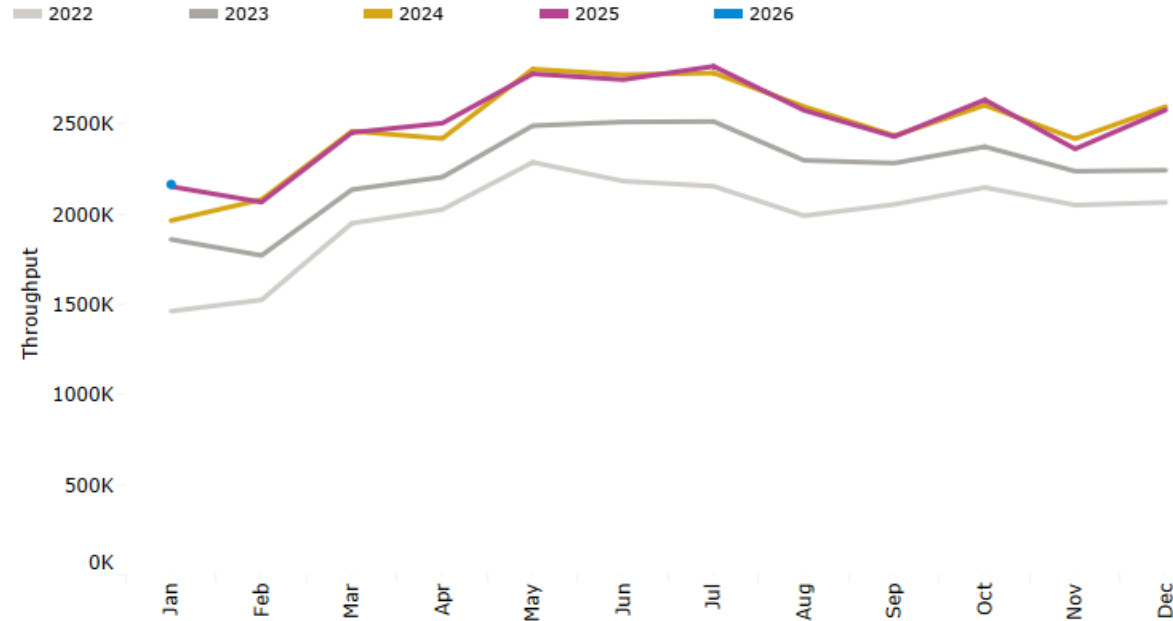
January Volume

2.2M

+0.6% YOY

TSA Checkpoint Volume by Month

Last Five Calendar Years

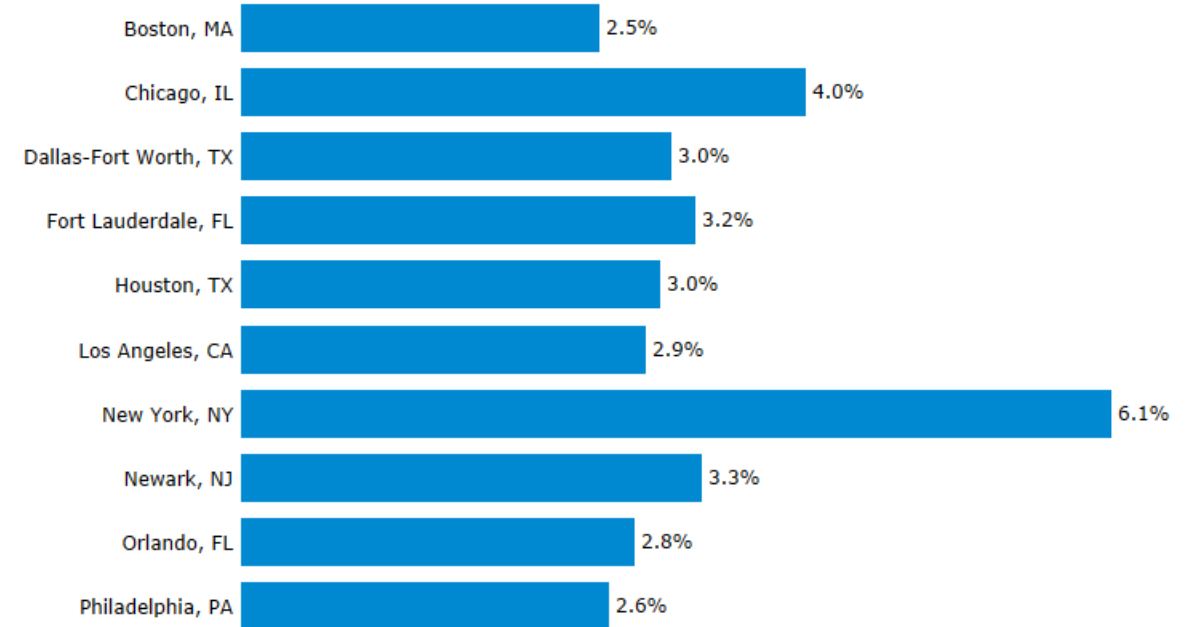


Source: Transportation Security Administration

Source: Transportation Security Administration

Top Origin Markets - Air

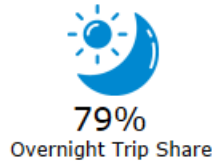
Jan - Dec 2025 Visitor Arrivals



Source: OAG

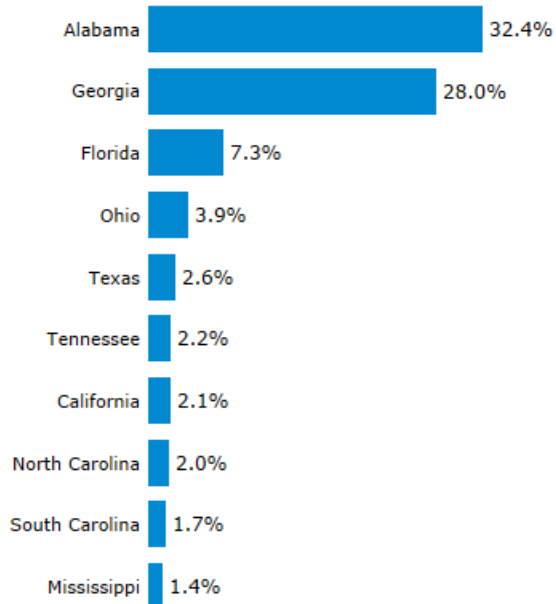
Visitor Profile

January 2026 Domestic Visits

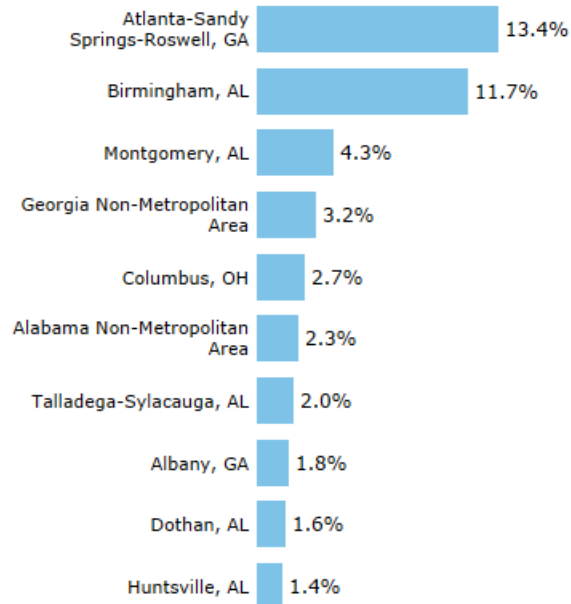


Top Origin Markets

States

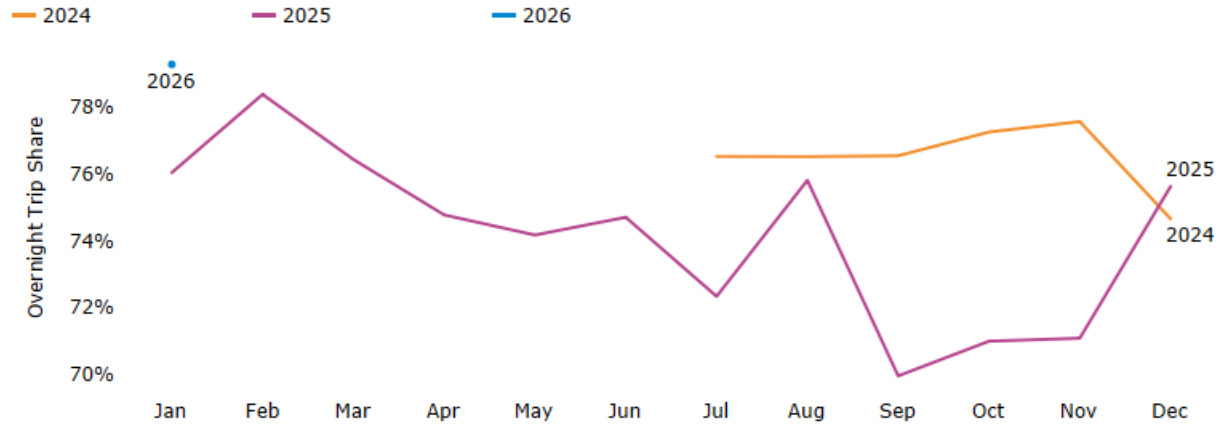


MSA



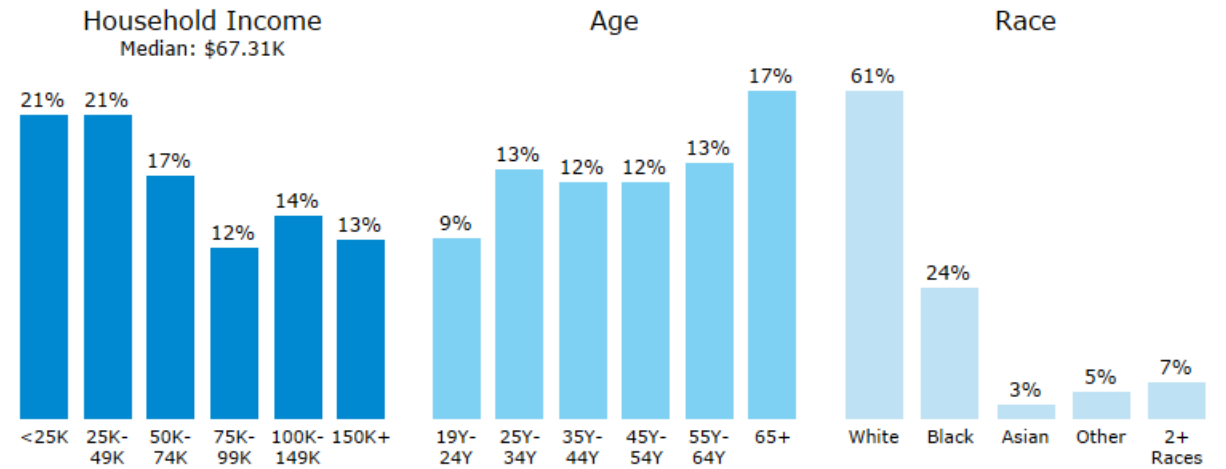
Domestic Visitor Trends & Characteristics

Overnight Trip Share by Month



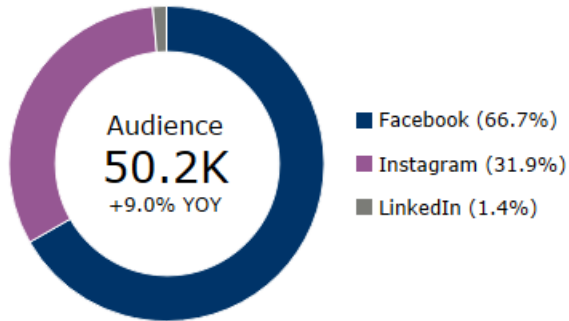
January 2026 Visitor Origin Demographics

Share of Total

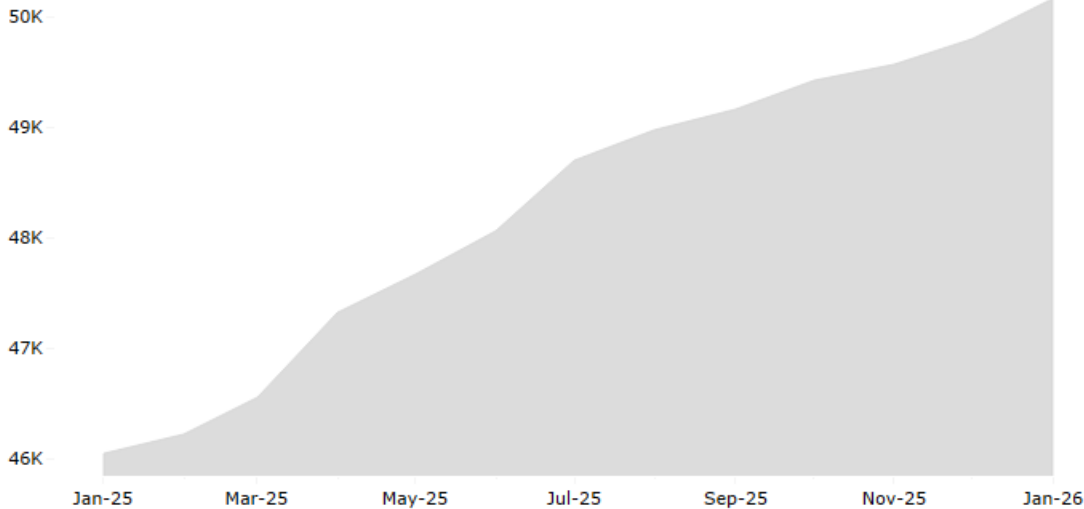


Social Media Summary

Audience Overview



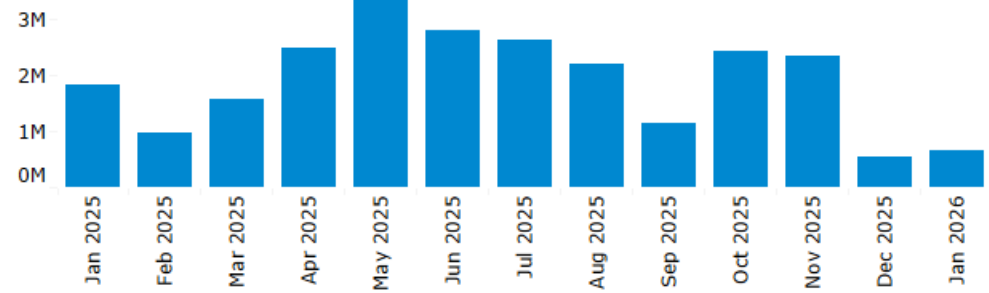
Audience by Month



Engagements & Impressions

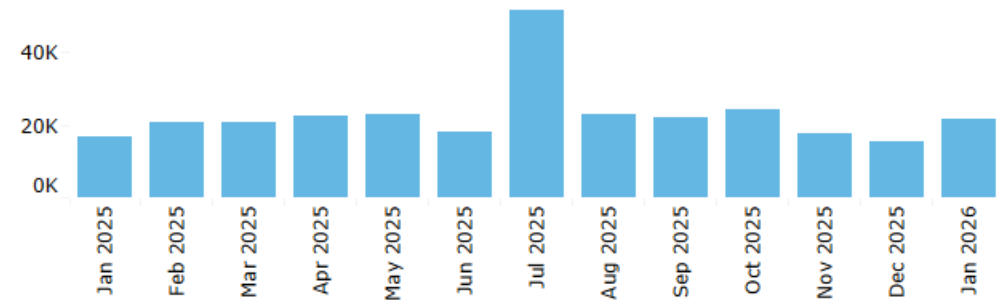
Impressions

January 2026
657.6K
-63.7% YOY



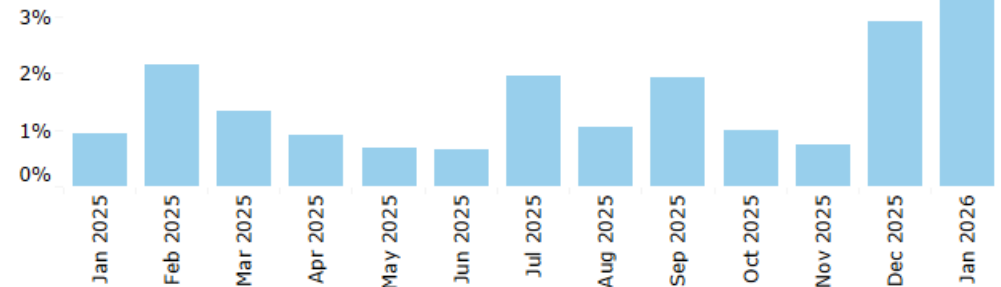
Engagements

January 2026
21.8K
+30.9% YOY



Engagement Rate

January 2026
3.3%
+2.4% pt YOY



Website Performance Summary

January 2026 | Properties: All



Users
67.0K
+157.4% YOY



Sessions
69.9K
+132.3% YOY



Engaged Sessions
13.0K
-10.1% YOY



Engagement Rate
18.7%
-29.57% pt YOY



Page Views
81.7K
+75.2% YOY



Pages Per Session
1.17 pages
-0.38 pages YOY

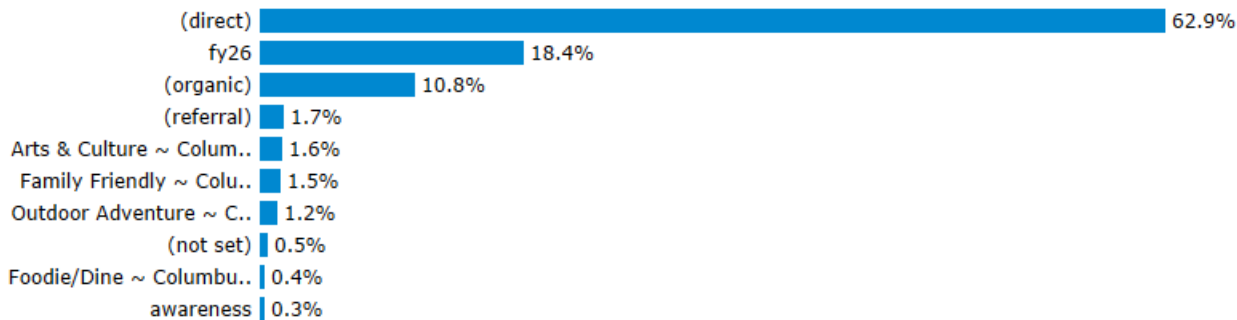


Avg. Session Duration
00:00:46
-53 sec YOY

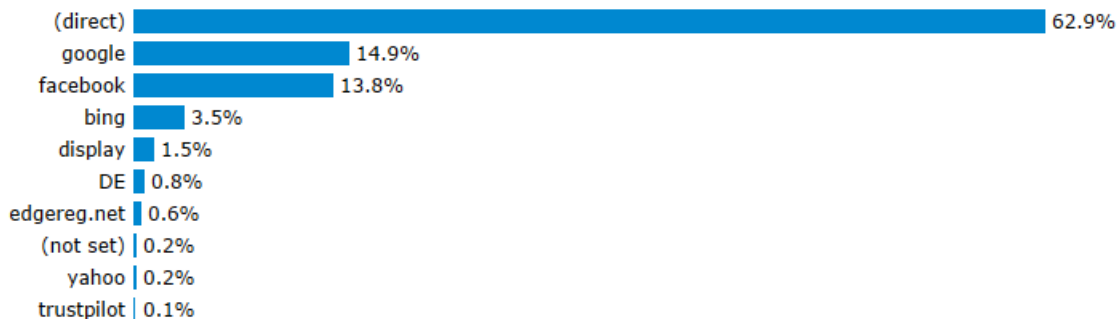


Bounce Rate
81.3%
+29.57% pt YOY

Campaigns

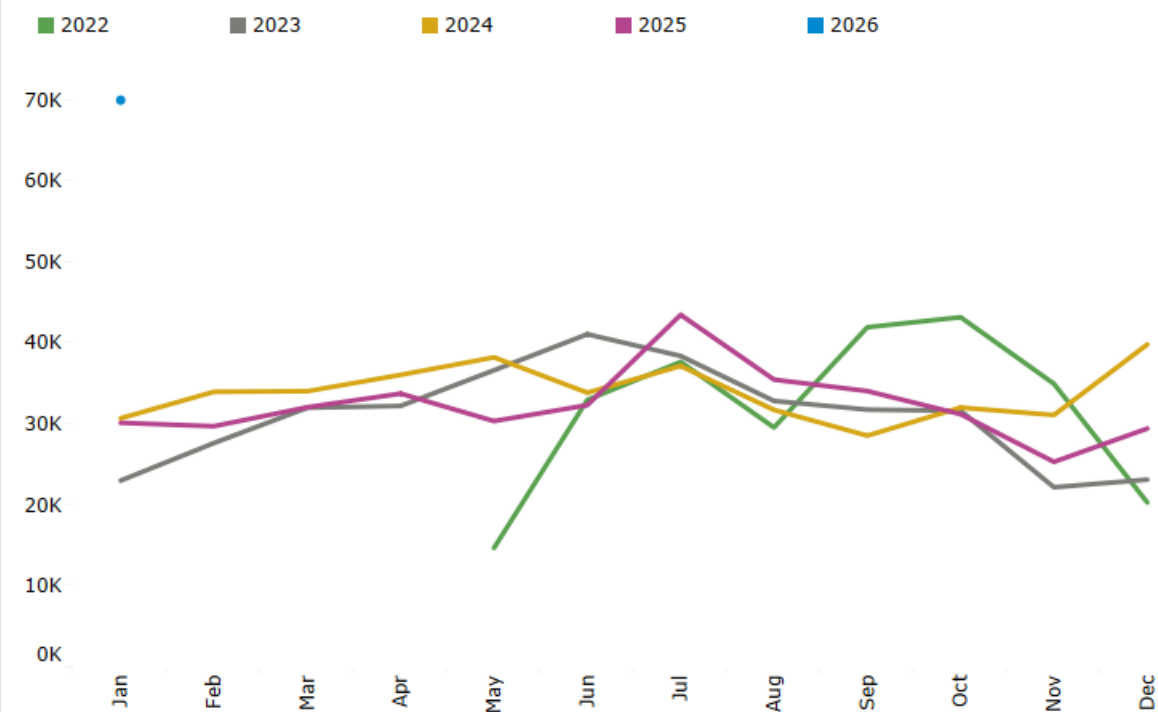


Sources



Sessions Analysis

Monthly Trend




Social Media Performance by Platform

January 2026




Facebook

 Audience
33.5K
+5.3% YOY

Engagement Rate	3.9%
Impressions	515,304
Video Views	32,475
Engagements	19,890
Comments	179
Reactions	2,319
Shares	184
Post Link Clicks	8,356
Other Post Clicks	8,852

Instagram

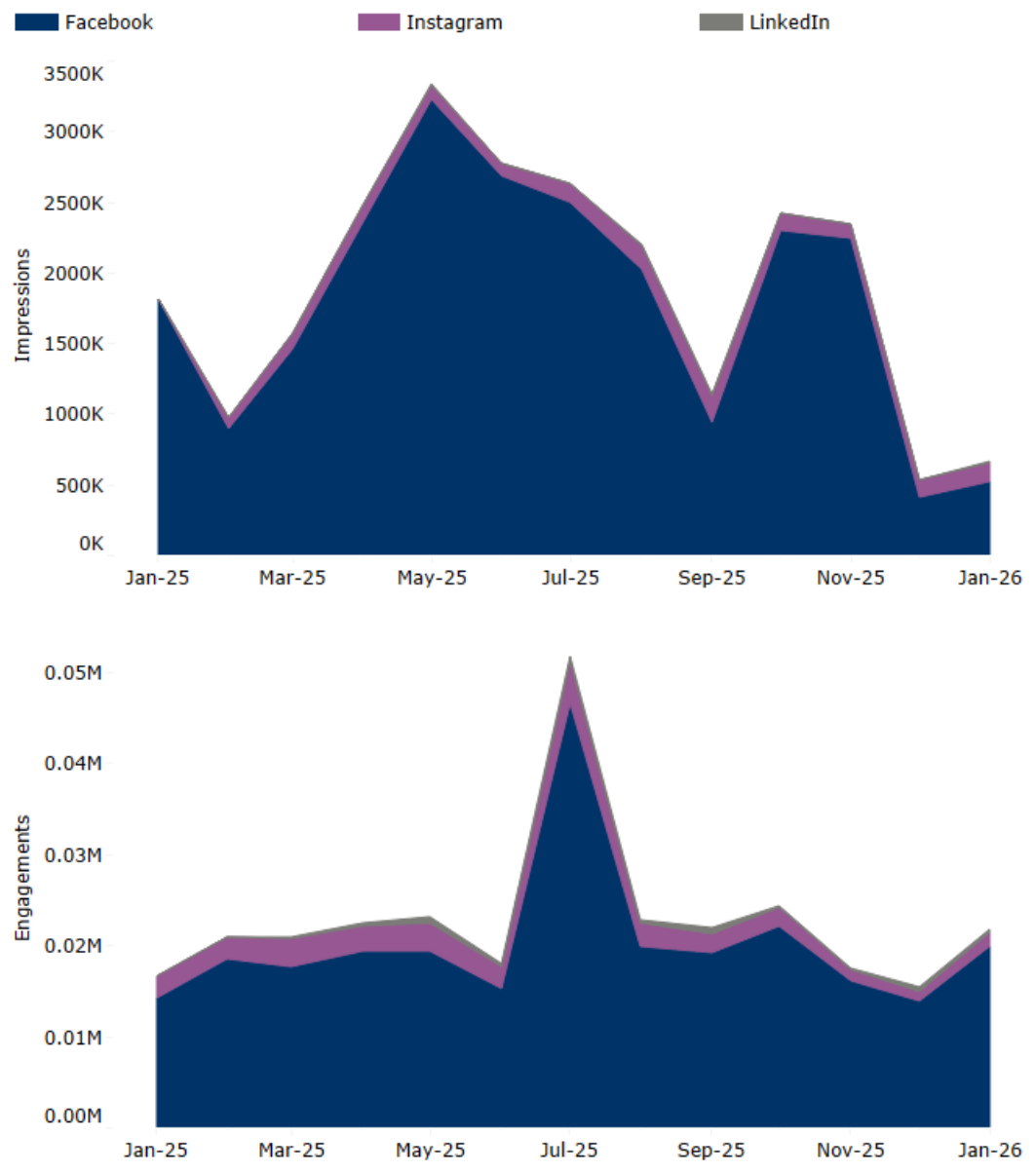
 Audience
16.0K
+12.2% YOY

Engagement Rate	1.1%
Impressions	139,249
Video Views	4,454
Engagements	1,491
Comments	51
Reactions	1,210
Saves	
Shares	143

LinkedIn

 Audience
702

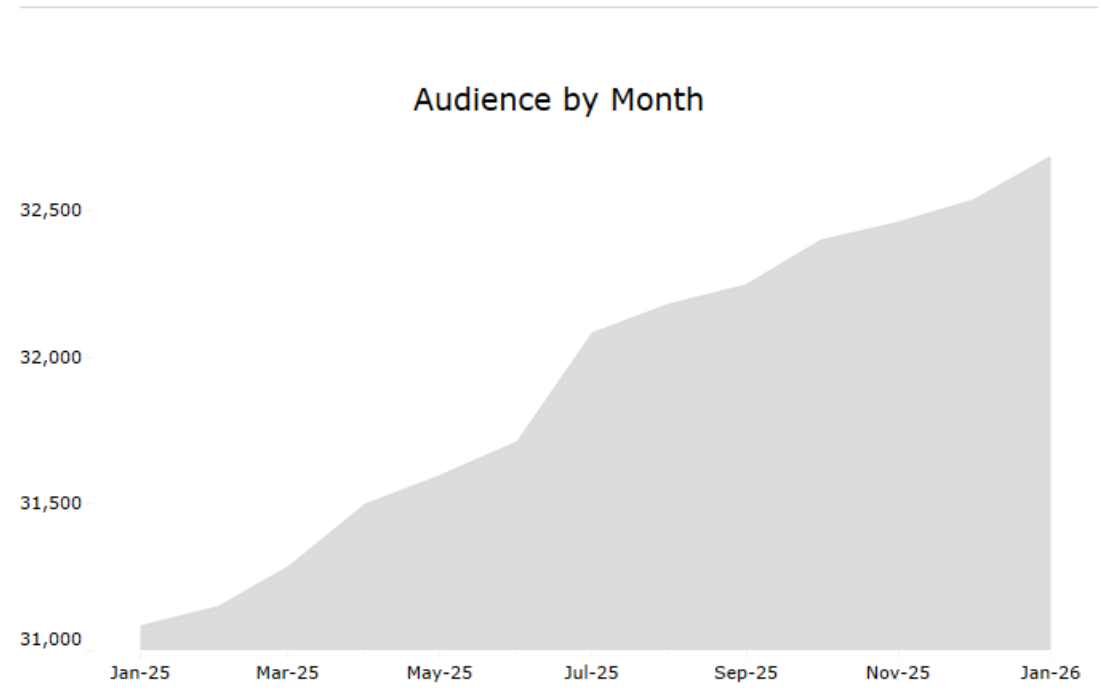
Engagement Rate	14.7%
Impressions	3,016
Video Views	0
Engagements	444
Comments	8
Reactions	120
Shares	0
Post Link Clicks	



Source: Sprout Social

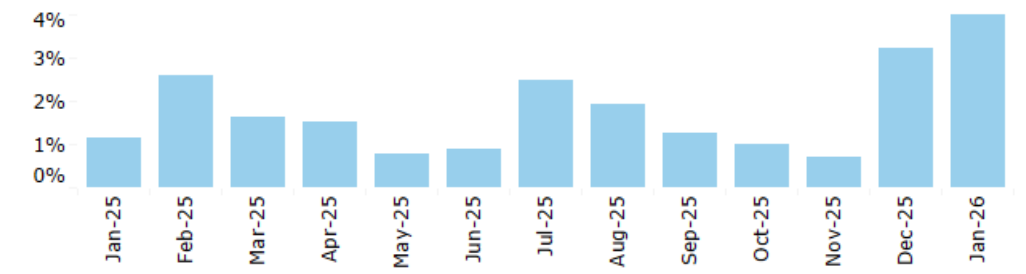
Audience Overview

Audience
 January 2026
32.7K
 +5.2% YOY

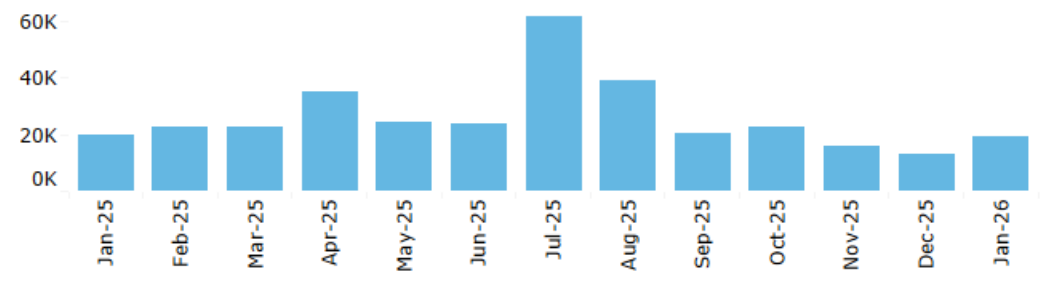


Engagements & Impressions

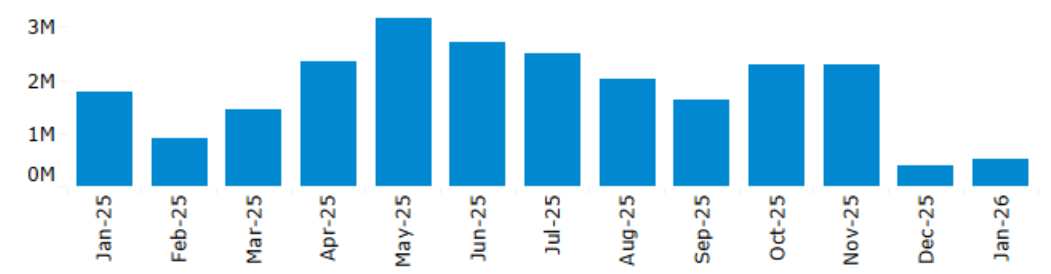
Engagement Rate
 January 2026
4.0%
 +2.8% pt YOY



Engagements
 January 2026
19.1K
 -4.1% YOY



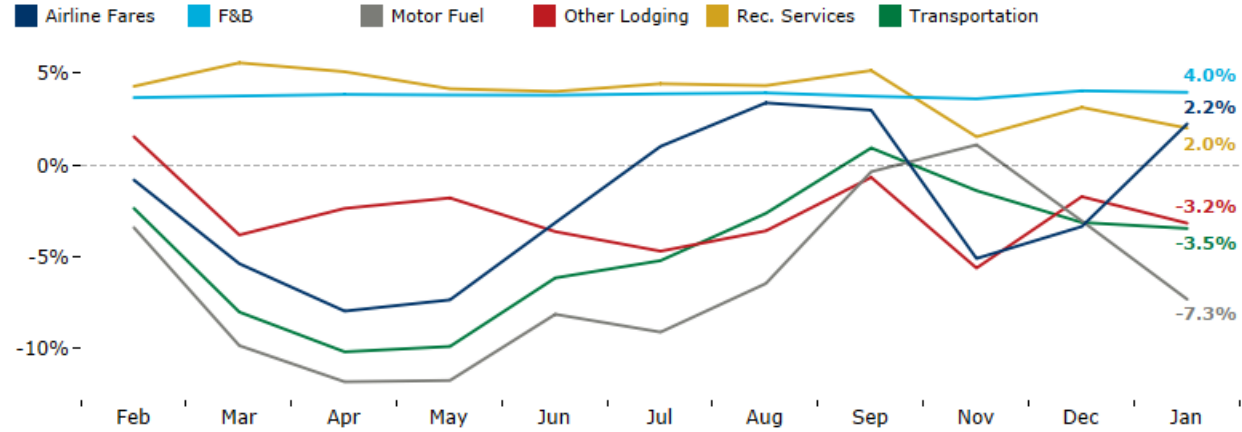
Total Impressions
 January 2026
524.8K
 -70.5% YOY



National Travel Trends

Travel Price Index

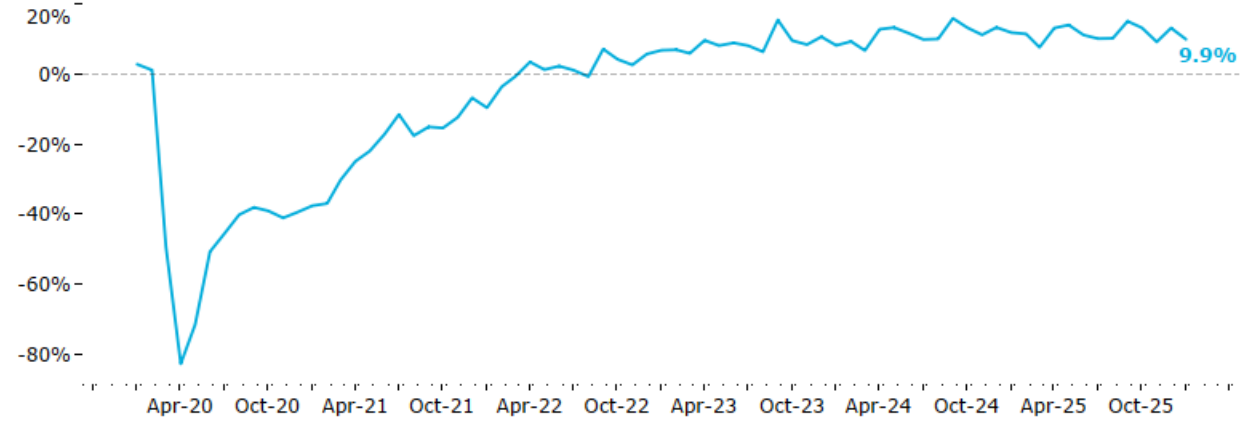
% Change Relative to Same Month in Previous Year | Last 12 Months



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

Travel Spending (% change vs 2019)

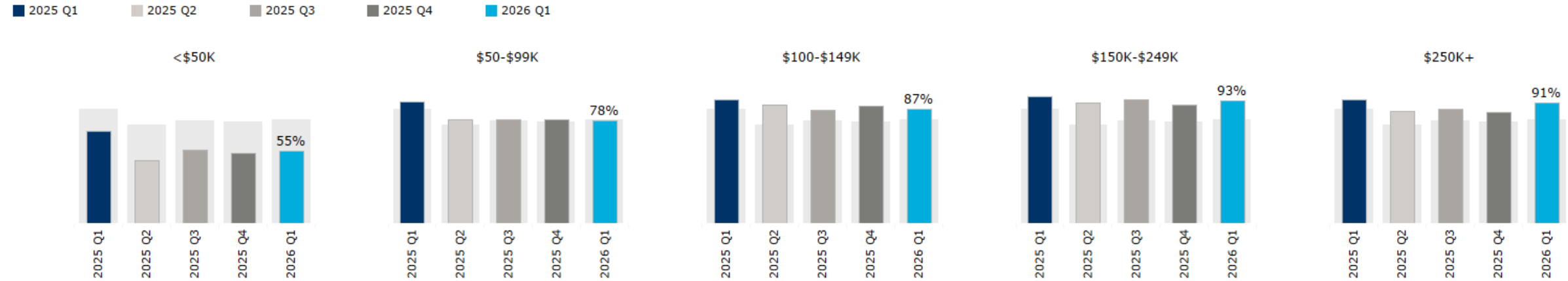
% Change vs. 2019 | U.S. total



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)

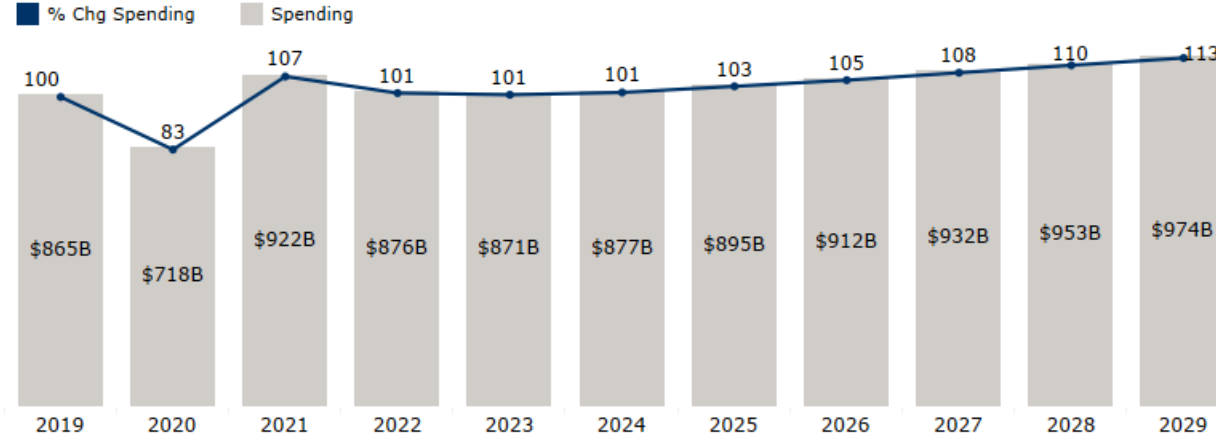


Note: Light gray bars represent the average for all survey respondents
 Source: MMGY Global's Portrait of American Travelers

Domestic Travel Forecast

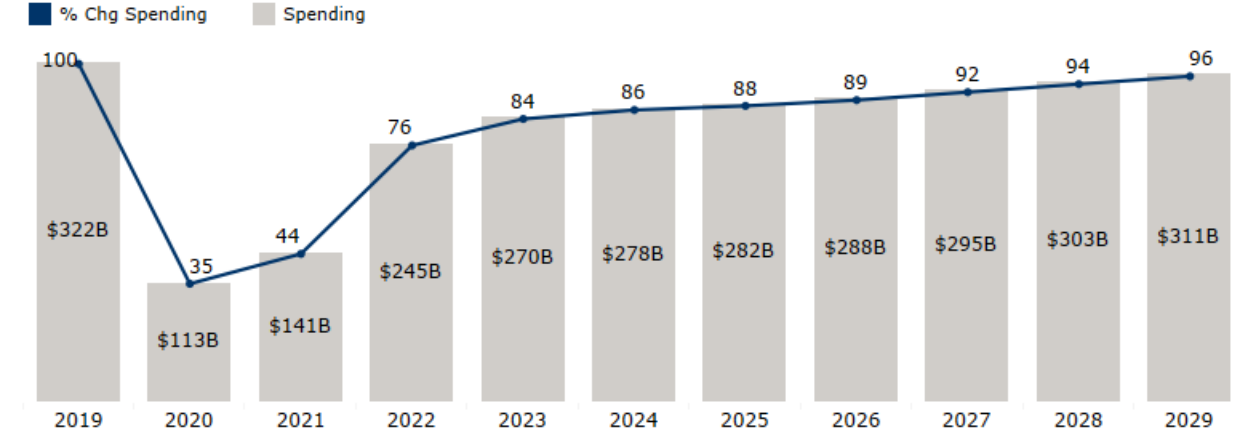
Real Domestic Leisure Travel Spending

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



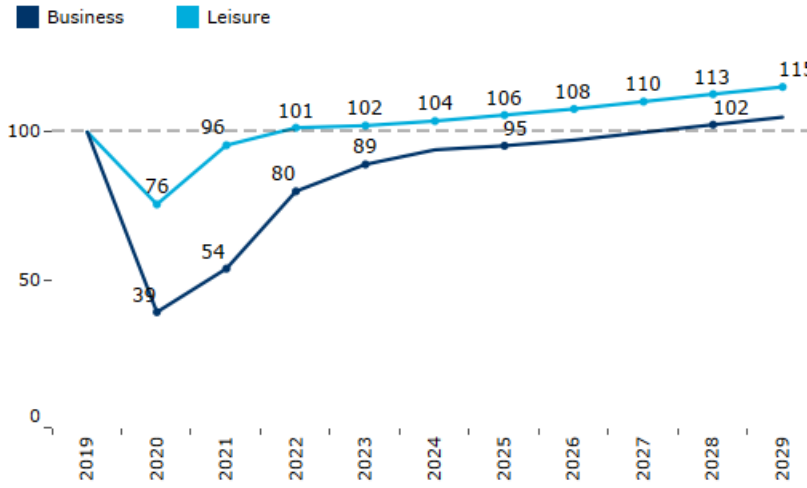
Real Domestic Business Travel Spending

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



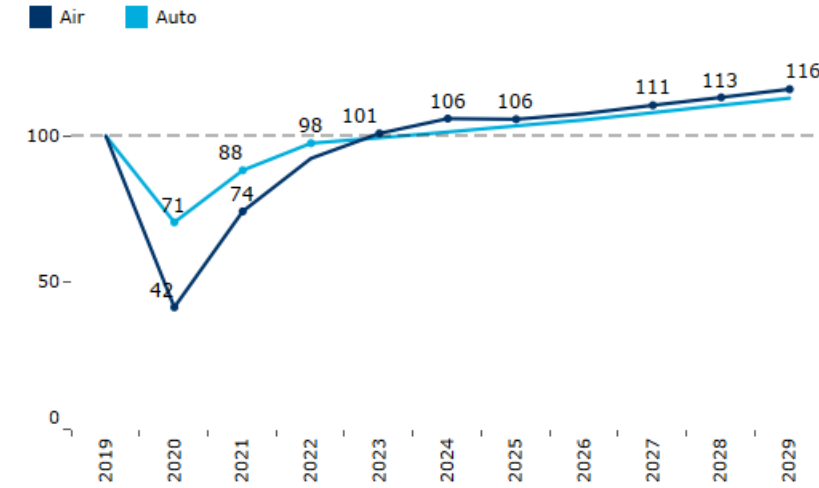
Leisure vs. Business Travel Volume

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



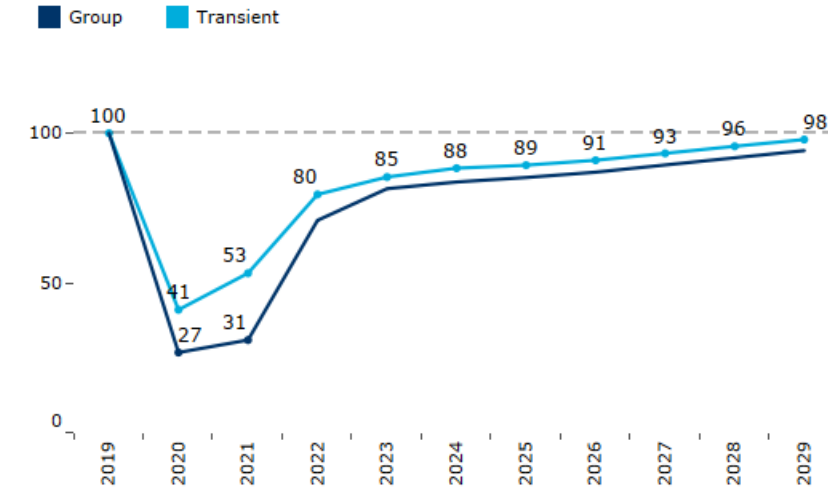
Auto vs. Air Travel Volume

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

