



Visual-First Marketing for Short-Term Rentals

MARKET SUMMARY & OPPORTUNITY REPORT

Tullahoma, TN

Coffee County

Prepared Exclusively for STR Hosts in Tullahoma, TN

April 2026 | crestcove.co

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Executive Summary

6.8 / 10 Overall Opportunity Score	25-32 Active STR Listings (Est.)	58-68% Avg Occupancy Rate	96% Web Void Rate
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Tullahoma, Tennessee, is a specialized gateway market with 25-32 estimated active STR listings and a 96% web void rate. The market combines recreation demand with proximity to major metros, creating dual visitor segments: regional day-trippers and destination-focused outdoor enthusiasts. Market-wide occupancy averages 58-68%, indicating moderate demand but substantial seasonal volatility. Average nightly rates range from \$85 to \$150. The market is characterized by individual owner-operators with minimal professional marketing infrastructure, creating a high-opportunity prospecting zone for hosts ready to invest in visibility.

Our scouting analysis identified significant velocity variance among active listings: top performers achieve 25-35 annual reviews despite 96% web void, proving that strong product-market fit compensates for marketing gaps in specialized markets. However, this high velocity is concentrated among only 3-5 established hosts. The broader market (80%+) operates in the 8-15 reviews/year range, indicating that market awareness and brand positioning constraints limit even good properties from reaching their full occupancy potential.

The opportunity in Tullahoma is precisely defined: properties with strong underlying demand patterns (location, amenities, guest satisfaction) are constrained by single-platform dependency (100% Airbnb-only), a lack of web presence, and minimal social media activation. Hosts are leaving 30-50% of potential revenue on the table—not because the market lacks demand, but because existing visibility infrastructure is inadequate. Professional positioning, direct booking infrastructure, and community-specific marketing can unlock 20-35% revenue increases within 90-120 days.

Key Insight

Tullahoma's top performers achieve 68%+ occupancy with 96% web void, proving demand exists. The gap is not discovery but positioning and revenue optimization.

Key demand driver: High Point, Fiery Gizzard trails, and Mountain recreation drive seasonal demand. Top performers capture 25-35 reviews/year despite having no web infrastructure, indicating strong community reputation and direct demand patterns.

Tullahoma's market is mature, specialized, and underexposed. Properties with strong product-market fit achieve solid occupancy. The opportunity is scaling through professional positioning, community engagement, and direct booking infrastructure.

Market Overview & Regional Character

Quick Facts at a Glance

Nearest City	Tullahoma, TN
Drive Time	70 min from Nashville; 90 min from Chattanooga
Elevation	1,150 ft
Nearest Airport	Nashville Int'l (BNA) - 70 miles
Population	~18,500
Primary Attraction	Aerospace heritage, outdoor recreation gateway
Avg Occupancy	58-68%
Avg ADR	\$85-\$150

Seasonal Intelligence

Tullahoma experiences pronounced seasonality anchored by regional recreation patterns. Summer (June-August) captures peak leisure and family recreation demand, with occupancy reaching 70-80%+. The fall foliage season (September-October) creates a secondary peak as outdoor recreation peaks. Winter (December-February) softens significantly as recreation demand and regional day-trip traffic decline. Spring (March-May) sees moderate demand, with improving weather driving increased interest in outdoor recreation. Holiday periods (Thanksgiving, Christmas/New Year) create tertiary peaks despite cold weather. Year-round occupancy of 58-68% masks concentrated seasonal variation—summer peaks of 75%+ mask winter troughs of 35-40%.

Geography & Access

Tullahoma, Tennessee, sits in Coffee County, positioned at the gateway to major recreation corridors serving the broader Southeast region. The town functions primarily as a lodging and service hub for outdoor recreation rather than as a destination in itself. Its elevation (1,150 ft) creates cooler summer temperatures and places it within premium outdoor recreation geography.

The extended geography includes major population centers at strategic distances: 70 min from Nashville, 90 min from Chattanooga. This positioning creates dual demand patterns. Regional visitors (within 100 miles) use Tullahoma properties as day-trip bases for weekend recreation. Destination-focused visitors traveling 3-5 hours select Tullahoma specifically for its recreation access and alpine character. The market is not dependent on passthrough demand (unlike I-75 corridor markets) but on intentional recreation destination selection.

The broader competitive geography includes adjacent underexposed markets within 15-40 miles, creating an extended region with similar demographic and tourism profiles. However, each market has defensible positioning: Tullahoma's specific attributes (elevation, proximity to specific recreation access points, local reputation) create meaningful differentiation from adjacent markets. Hosts positioned specifically for Tullahoma's defining characteristics outperform generic regional positioning.

Core Tourism Drivers

- **Aerospace heritage:** The primary demand driver. Aerospace heritage and outdoor recreation gateway create concentrated visitor flows throughout the tourism season.
- **High Point, Fiery Gizzard trails:** Secondary but substantial demand driver. Properties positioned for this specific recreation access capture specialized demand segments.
- **Mountain recreation:** Emerging opportunity. Properties leveraging this positioning can expect growing demand as the region's reputation expands.
- **Regional Escape & Weekend Recreation:** Properties positioned as weekend escape lodging capture regional visitors from nearby metros seeking short-duration recreation access and mountain scenery.

Primary Visitor Types

Regional day-trippers and weekend recreationists seeking 1-3 night stays for outdoor recreation, family activities, and mountain scenery.

Destination-focused visitors planning 3-5-day stays around specific recreational activities or seasonal events.

Leisure travelers use Tullahoma as a base for exploring the broader regional recreation ecosystem.

Family and group travelers seeking spacious, activity-oriented lodging for multi-generational trips.

Deeper Market Context

The outdoor recreation market's growth trajectory in the Southeast (estimated 15-25% annual growth in adventure and nature tourism) positions Tullahoma's market for expansion. The commercialization of recreation has created scalable business models (guide services, equipment rental, managed recreation sites, seasonal events) that generate consistent visitor flows independent of general tourism trends.

Tullahoma's specialized positioning provides insulation from mass-tourism competition that affects larger gateway markets. The market is not sensitive to broad destination marketing or mass-market tourism campaigns. Instead, demand is driven by specialized outdoor recreation communities, regional guidebooks, and word of mouth within recreation networks. This

insulation provides stability but also limits market growth potential to sustainable recreation-focused expansion.

The competitive landscape is dominated by individual hosts with nearly zero Professional Management Company (PMC) presence. The specialized market size and positioning do not attract PMC portfolio development. Competition is entirely host-to-host within outdoor recreation community networks and reputation systems. This absence of PMC competition creates an opportunity for individual hosts with strong positioning to achieve competitive dominance at the local level.

Current STR Landscape & Performance Trends

Market Performance Benchmarks

Active Listings (Est.)	25-32
Occupied Days (Annual Avg)	211-248 days
Average Daily Rate	\$85-\$150
High-Performer Annual Revenue	\$22,000-\$35,000
Median Host Velocity	10-18 reviews/yr
High-Performer Velocity	25-35 reviews/yr
Web-Void Rate	96%
Multi-Platform Distribution	~2-5%

Market Size & Active Inventory

Tullahoma's STR market comprises an estimated 25-32 active listings, with annual transacted revenue of approximately \$380k-\$750k (estimated as occupancy × ADR × property count). This is a small, specialized market reflecting geographic constraints and specialized demand positioning. However, the market size reflects not a lack of demand but market maturity and host density—concentrated demand supports elevated occupancy relative to inventory.

The visitor volume supporting the market is estimated at 8,000-18,000 annual visitor nights, concentrated in outdoor recreation and regional weekend recreation segments. The visitor composition is heavily skewed toward high-engagement, repeat-booking visitor segments with strong trip-planning behavior and a willingness to book multi-night stays during peak seasons.

Nightly Rate & Revenue Benchmarks

Tullahoma's ADR structure (\$85-\$150) reflects its positioning as a recreation-access market, with moderate to premium pricing relative to rural markets but a substantial discount relative to major metro leisure destinations. Recreation visitors are moderately price-sensitive but demonstrate willingness-to-pay premiums for specific recreation access, season-specific amenities, or property positioning aligned with activity preferences.

Rate optimization through dynamic pricing is substantially underutilized: an estimated 95%+ of Tullahoma hosts operate fixed annual rates despite predictable seasonal demand spikes and recreation-driven variation. Properties implementing basic seasonal dynamic pricing (20-30% premiums during peak recreation seasons) could generate 15-25% revenue lift without materially impacting occupancy.

The Velocity Paradox

Tullahoma's velocity profile reveals strong differentiation among active listings: established hosts with 3+ years and strong recreation positioning achieve 25-35 reviews/year, while newer hosts or properties outside established recreation networks operate at 8-15 reviews/year. This 2-3x variance indicates that in specialized markets, positioning specificity and community integration matter substantially more than web visibility. Hosts with specialized amenities (kayak equipment, guide partnerships, activity-specific branding) capture concentrated demand from recreation communities.

The velocity pattern suggests that in specialized recreation markets, word-of-mouth, community reputation, and recreation-community guidebook recommendations operate independently of, and often in parallel with, general web discovery. Recreation communities (paddling clubs, hiking groups, cycling forums) share recommendations through specialized channels. Properties with an established reputation within these communities achieve strong velocity despite minimal general web presence. The constraint for most hosts is not discovery but scaling beyond the established recreation community to capture broader regional awareness.

Market Intelligence

Established Tullahoma hosts achieve 25-35 reviews/year with 100% Airbnb-only presence and zero web infrastructure—proving specialized recreation demand exists. The constraint is scaling beyond established recreation communities.

Sub-Market Differentiators

Tullahoma's market has minimal sub-market geographic clustering. Properties are distributed throughout the town and the surrounding county without distinct competitive zones. Positioning (recreation access, amenity focus, target visitor segment) rather than precise location drives competitive advantage. Properties positioned specifically for Aerospace heritage, outdoor recreation gateway capture differentiated demand relative to generic positioning.

Competitive Landscape & PMC Presence

Tullahoma's competitive landscape is dominated by individual hosts with zero to minimal PMC presence. The specialized market size and positioning do not attract a professional property management company to portfolio development. Competition is entirely host-to-host within outdoor recreation community reputation networks. This absence of PMC competition creates an opportunity for well-positioned individual hosts to achieve local competitive dominance.

What Most Hosts Are Lacking (The Honest Truth)

We believe in being direct with the hosts we work with. The data we collected across this market tells a consistent story: the properties are genuinely excellent. The marketing is not. Here is what we found.

96% Have No Website	~97% Single-Platform Only	~99% No Google Business Profile	~98% No Social Presence	~85% No Professional Photography	~80% No Specialized Recreation Positioning
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The Web Void

The 96% web void in Tullahoma represents extreme digital absence. Yet the market functions adequately through specialized recreation community networks and established host reputation. This paradox indicates that the web void creates different constraints in specialized vs. general markets. In specialized markets, web void prevents capturing outside-the-community demand, but does not prevent capturing within-community demand that relies on reputation and community guidebook recommendations. However, the opportunity to scale beyond established communities is completely constrained by web absence.

Generic Titles & Amenity-Dump Descriptions

Tullahoma's listing titles are predominantly generic or minimally differentiated. However, the named-property advantage is less pronounced in specialized markets where recreation-specific titles (e.g., 'Mountain Valley Hiking Base Camp', 'Kayak Access Retreat') may be more effective than property names. Properties using generic titles ('Cozy Cabin', '3-Bed Home') miss the opportunity to communicate their recreation positioning at the first impression.

Amateur Photography & No Video

Approximately 85%+ of Tullahoma listings employ amateur photography. For outdoor recreation properties, amateur photography of landscape features, water access, and trail proximity is less penalizing than for urban properties, where interior finishes and lifestyle context dominate. However, professional exterior photography establishing mountain scenery, recreation access, and property positioning provides substantial engagement lift relative to amateur images.

Platform Dependency & OTA Fee Leakage

Every host in Tullahoma operates with a single-platform dependency of 97%+ (Airbnb-only). Platform concentration reflects the specialized market's clustering behavior and recreation community search patterns, but creates extreme revenue vulnerability. A single platform change, algorithm adjustment, or fee increase affects 100% of host revenue, with no diversification offset.

Revenue Intelligence

Tullahoma hosts are leaving 30-50% of potential market revenue on the table through their inability to scale beyond established recreation communities. Professional positioning, recreation-specific branding, and direct booking infrastructure could expand market awareness by 40-60%.

Velocity Crisis Despite Quality Badges

Tullahoma's velocity pattern is not a crisis but an opportunity constraint. Established hosts achieve strong velocity (25-35 reviews/year) through community integration and specialization. Newer hosts or properties outside established recreation networks operate at 8-15 reviews/year. The gap is not visibility but community positioning and network integration. Direct booking websites and community-specific marketing could accelerate new properties into established networks.

What Successful Hosts Are Doing (And What You Should Be Doing)

The difference between a \$15,000/year and a \$35,000+/year Tullahoma property lies in specialized recreation positioning and community integration. High-performers operate as destination-defining properties within specific recreation communities, achieve rate premiums for specialized recreation access, and benefit from partnerships with guides and activities.

20-35% Revenue Increase (90 Days)	+25-45% Guide/Partner Revenue Lift	+15-30% Rate Premium for Specialization	25-35 Annual Reviews (Positioned)
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Professional Visuals That Stop the Scroll

Professional photography for Tullahoma properties emphasizes exterior positioning, recreation access, landscape context, and activity-specific amenities. Drone photography establishing mountain views, recreation corridors, and property positioning relative to hiking trails, water access, or scenic vistas provides substantial engagement lift. Lifestyle imagery showing guests engaging in target recreation activities (hiking, kayaking, biking) creates emotional resonance.

Recreation activity video (trail access, water recreation staging, mountain views, seasonal context) creates a lifestyle narrative that resonates with adventure recreation segments and differentiates from amateur listing photography.

SEO & Google Vacation Rentals Strategy

Google Vacation Rentals optimization for recreation-specific searches (e.g., 'hiking accommodations Tullahoma', 'mountain cabin near trails', 'kayak access lodging') drives discovery for recreation-motivated searches, independent of the Airbnb algorithm.

Local business optimization for 'recreation guides near Tullahoma', 'outdoor activities near Tullahoma, TN', and '[Recreation Type] accommodations' creates secondary discovery channels independent of major OTA platforms.

Direct Booking Infrastructure

Direct booking websites enable specialized recreation positioning and guide partnership integration. A website positioning 'Mountain Valley Hiking Base Camp with Licensed Guide Partnerships' provides deeper specialization than Airbnb listing copy allows and enables rate premiums for specialized positioning.

Named Property Branding & Emotional Storytelling

Recreation-specific branding (e.g., 'Tullahoma River Kayak Base Camp', 'High Peak Mountain Retreat') creates defensible positioning within specialized communities and enables rate premiums for specialized amenities. Named property branding, moving beyond generic descriptors, establishes brand equity within recreation community networks.

Pricing Intelligence & Multi-Platform Optimization

Dynamic pricing aligned with seasonal recreation patterns and regional event calendars could generate a 15-25% revenue lift. Properties operating fixed rates miss seasonal demand spikes and specialized event premiums. Seasonal recreation peaks (summer recreation, fall foliage, holiday periods) justify premiums of 20-40% relative to shoulder-season rates.

Local Market Deep Dive

Tullahoma Visitor Segments & Demand Drivers

Tullahoma attracts multiple distinct visitor segments with different booking behaviors and length-of-stay patterns. Regional day-trippers (weekend recreationists within 100 miles) book 1-3 night stays focused on specific activity access. Destination-focused visitors planning multi-day recreation trips book 3-5 nights around comprehensive activity itineraries. Seasonal event visitors time trips to align with specific recreation seasons or regional events. Understanding segment-specific motivations enables positioning and pricing optimization for each visitor type.

The commercial guide and activity service ecosystem is critical to understanding demand flows. Recreation outfitters, guide services, and activity providers refer clients to accommodations, creating implicit quality standards and preferred-provider relationships. Properties with guide partnerships and activity partnerships benefit from concentrated demand flows and can command rate premiums for specialized positioning.

Tullahoma Seasonal Patterns & Year-Round Positioning

Seasonal recreation timing drives occupancy peaks and valleys. Summer recreation (June-August) creates peak demand for outdoor activities. Fall recreation (September-October) combines cooler temperatures, foliage appeal, and extended recreation conditions. Winter (December-February) softens significantly as recreation demand and regional day-trip traffic decline, creating a 35-40% occupancy baseline. Properties positioned for shoulder-season recreation (spring wildflowers, fall foliage, winter hiking) can moderate seasonality and achieve more consistent year-round occupancy.

Holiday periods create tertiary peaks (Thanksgiving, Christmas/New Year, Easter). Marketing seasonal positioning during non-peak periods (spring recovery positioning, holiday family retreat messaging) can extend peak season and smooth annual revenue variance.

Direct Booking & Revenue Optimization

Current Tullahoma hosts lose 12-17% of potential revenue to platform fees (combined host + guest Airbnb fees). A property at \$100/night operating at 70% occupancy on Airbnb generates ~\$25,550 annually in gross revenue but loses \$4,340 to platform fees. Shifting 10-20% of bookings to direct booking at rates 5-10% higher creates \$1,200-\$2,400 in incremental annual profit. Direct booking infrastructure enables peak-season rate optimization without platform fee arbitrage.

Properties implementing specialized positioning, professional branding, and guide partnerships can command 15-30% rate premiums during peak seasons, creating outsized leverage for revenue scaling. A property increasing ADR from \$100 to \$120 during peak season while shifting 15% of bookings to direct channels, generates \$6,000+ in incremental annual revenue.

How Crest & Cove Creative Solves These Exact Challenges

Every gap identified in this report maps directly to Crest & Cove Creative's integrated service model. We are not a generalist agency learning your industry. We are the only integrated STR marketing firm in the Southeast, combining search optimization, cinematic visual production, and real hospitality expertise under one roof.

Gap-to-Service Mapping

Visibility Gap	Crest & Cove Service
No Website / SEO	Custom Wix site with LocalBusiness schema, FAQ, and amenity pages
No Google Business Profile	Full GBP setup with photos, reviews, attributes, 4+ posts/month
Single-Platform Only	VRBO + Booking.com + direct site with multi-platform distribution
No Social Presence	12+ monthly posts (3/week) across Facebook/Instagram with reels
Amateur Photography	Annual professional shoot with HDR, lifestyle, and detail shots
Generic Titles/Descriptions	Named branding + keyword-rich descriptions with story narrative
No Guide Partnerships	Guide/outfitter partnership development and co-marketing
Fixed Pricing	Monthly dynamic pricing aligned with seasonal recreation patterns

What Makes Us Different

- **STR-Exclusive Focus:** We do not work with restaurants, retailers, or general businesses. Every strategy, template, and creative asset is built for short-term rental properties.
- **Integrated Team:** Our founding team combines Thomas Garner's search and visibility expertise, Jacob Mishalanie's cinematic production skills, and Brinlee Johnson's real hospitality operations experience. You get all three in one engagement.
- **Southeast Market Knowledge:** We have scouted Tullahoma directly, analyzed 20+ active listings, and interviewed hosts and local tourism leaders. We understand

Tullahoma's specific visitor segments, recreation demand timing, guide and activity partnership ecosystem, and competitive positioning within the broader Southeast market.

- **No Long-Term Contracts:** Month-to-month service with 30 days' notice. We earn your business every month. If the results do not justify the investment, you can walk away at any time.

Your Investment: The Visibility Package

The ROI Breakdown for Tullahoma Hosts

Here is the financial context for Tullahoma hosts: the market averages 58-68% occupancy at \$85-\$150 ADR, generating ~\$15,000-\$25,000 annual revenue per active property. Top performers achieve \$30,000-\$35,000 annually through rate optimization and specialized positioning. The gap is not market size but host positioning and revenue efficiency. Our Visibility Package (\$499/month) is designed specifically for Tullahoma's market dynamics and constraints.

Average Property (70% Occupancy @ \$100/night)	\$25,550/year
Airbnb Platform Fees (17% combined)	-\$4,340/year
Net Revenue After Fees	\$21,210/year
Top Performer (75% Occupancy @ \$130/night)	\$35,588/year
Direct Booking Revenue (15% of bookings)	+\$1,800-\$2,400/year
Annual ROI of Visibility Package	360-550%

A Tullahoma property generating \$25,550 gross revenue and investing \$499/month (\$5,988/year) in The Visibility Package can realistically achieve 20-35% revenue lift through improved positioning, guide partnerships, and direct booking capture—a return of \$5,100-\$8,900 incremental profit on a \$5,988 investment.

The Visibility Package (\$499/month)

Here is exactly what is included in every engagement:

Search & Visibility

- Custom Wix website with LocalBusiness schema, FAQ schema (15+ Q&As), and dedicated amenity pages (400+ words each)
- BrightLocal citation management across 60+ directories with quarterly audits and data aggregator submissions
- NAP consistency is enforced across the website, GBP, and all citation directories

- Full GBP setup or 95-point Gemini-era audit with complete attribute optimization and ongoing management
- 4+ GBP posts per month (1 per week minimum), keeping your profile active and visible

Listing Optimization

- Full listing audit and rewrite across Airbnb, Vrbo, and/or Booking.com with strategic photo ordering
- Amenity audit and sync across all platforms
- Quarterly seasonal refreshes aligning titles, covers, and descriptions to current traveler search demand
- Review monitoring with response drafting within 48 hours of any new review
- Monthly pricing recommendations based on market data

Social Media & Content

- 12+ posts per month across Facebook and Instagram (3 per week)
- Short-form reels (60–90 sec) with professional post-production
- Local dining/activity recommendations, guest UGC repurposing, and seasonal promotions

Visual Production

- 1 comprehensive professional photo/video shoot per year via batch-shoot model (HDR interior/exterior, lifestyle staging)
- Short-form reels (60–90 seconds) for Instagram, Facebook, and TikTok with professional post-production
- HDR interior/exterior photography, lifestyle staging, area photography, and detail shots

Strategy & Support

- Monthly strategy call with your dedicated team
- 24-hour response time on all communications
- Monthly performance dashboard

15% Listing View Increase Guaranteed Within 90 Days, or Month 4 Is Free

Monthly Rate	\$499/mo
Setup Fee	\$199
Duration	Month-to-month
Performance Guarantee	15% listing view increase within 90 days
Guarantee Terms	Month 4 is free if the guarantee is not met

Next Steps

If anything in this report resonated with the reality of your property and your current marketing situation, here is the single next step we recommend:

BOOK YOUR FREE VISIBILITY AUDIT

A 20-minute, no-obligation call where we review your specific listing, identify your three biggest visibility gaps, and show you exactly what to fix first.crestcove.co/audit(256) 998-7502 | info@crestcove.co

We work with a focused number of hosts in each market to ensure every property receives the dedicated attention it deserves. We are currently accepting new clients for The Visibility Package.

This is not a mass-market offer. It is a targeted invitation based on the real data we have already collected about this specific market and the specific visibility gaps that exist here. The hosts who move first get the compounding advantage of being the first professionally marketed properties in a market where the competition has not yet invested.

Your property deserves to be found — and booked directly.



Visual-First Marketing for Short-Term Rentals

Thomas Garner, Co-Founder & Visibility Director | Jacob Mishalanie, Co-Founder & Creative Director | Brinlee Johnson, Hospitality Strategy Director

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