

Travel Insights to Craft Effective Marketing Strategies for Lee County



SOJERN

fort
MYERS
LEE COUNTY VISITOR &
CONVENTION BUREAU



Agenda

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Domestic Travel Intent to Lee County

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Sojern Data Shows International Travel to Florida is Back

3

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A Look at Competitive Destinations



We know travelers—and move them
from dream to destination.

\$13B
Bookings

10,000
Global
Customers

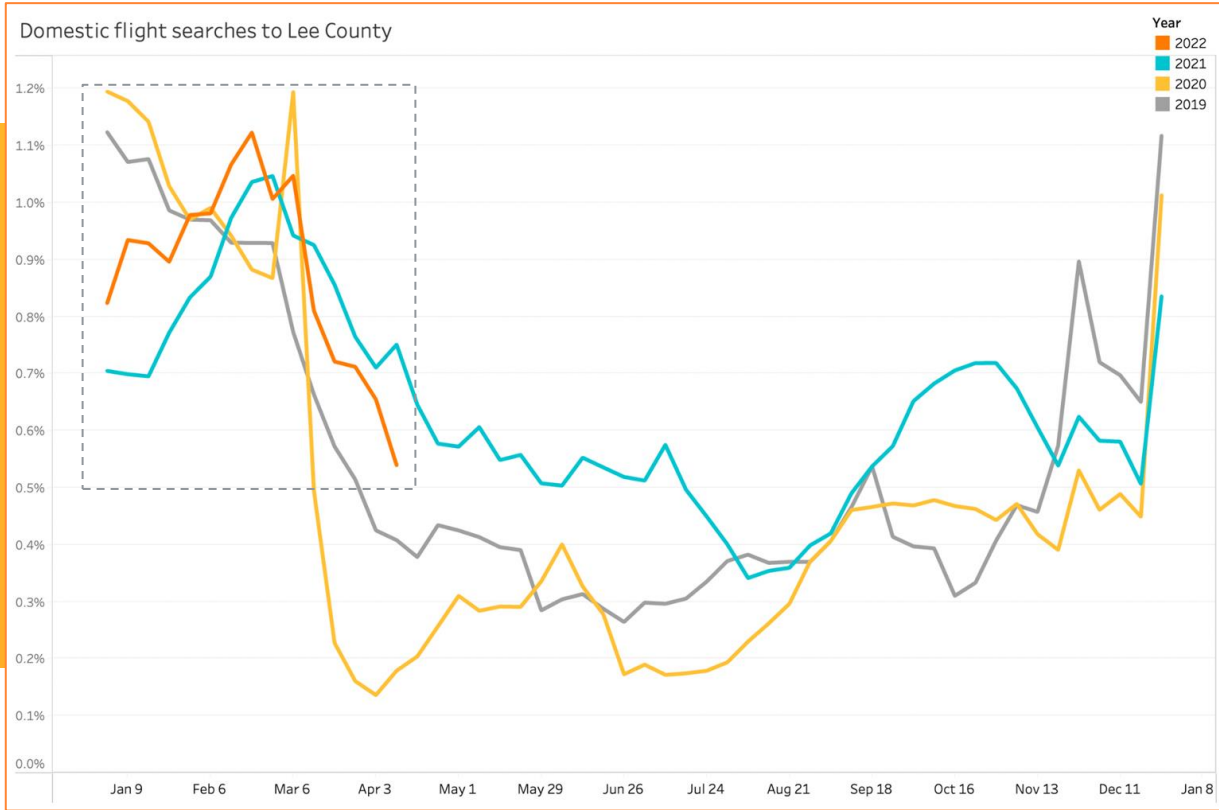
350M
In-Market
Travelers

Sojern works for destinations, hotels, attractions,
airlines, cruise lines, and more.



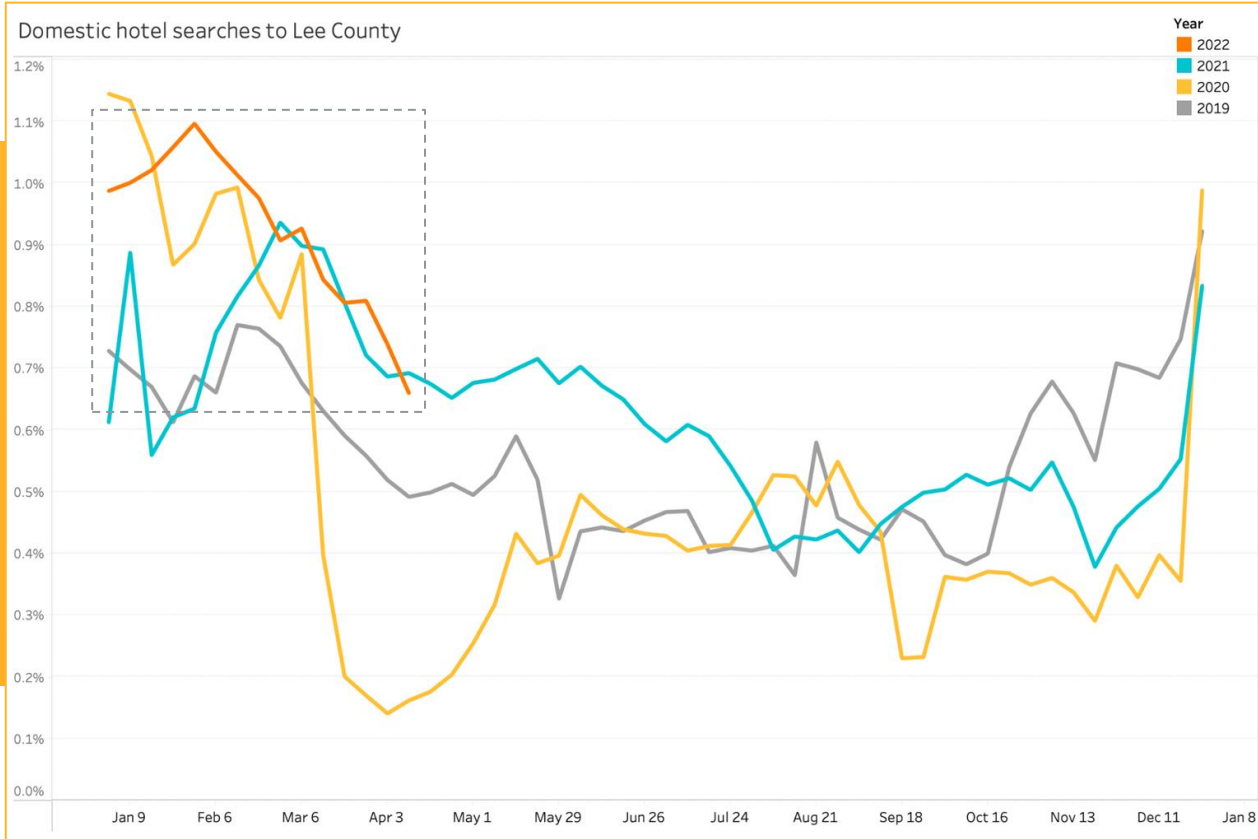
Domestic Travel Intent to Lee County

Domestic Flight Searches to Lee County



Before March, domestic flight searches to Lee County in 2022 were higher than 2021 levels slightly, but fell below 2021 levels after March.

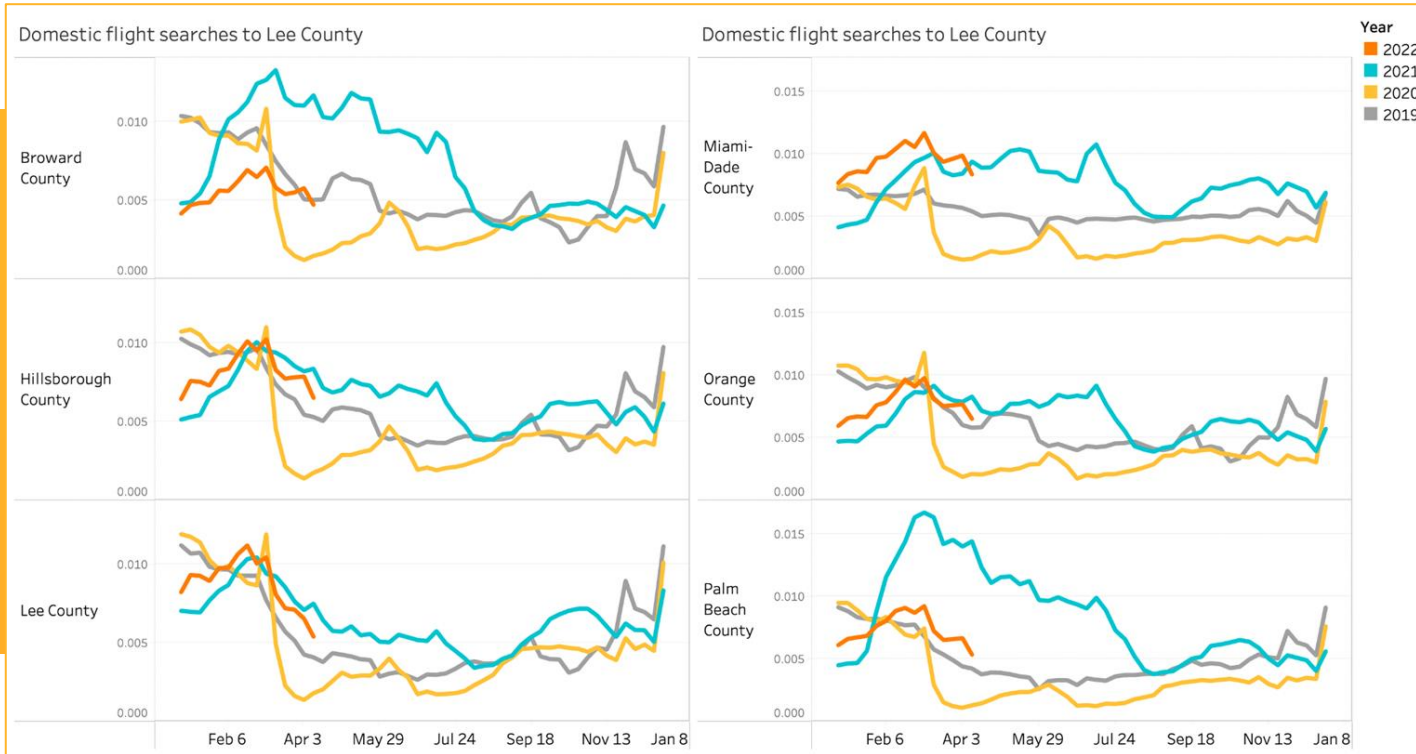
Domestic Hotel Searches to Lee County



We see similar pattern for hotel searches, where after March, 2022 levels were comparable to 2021 levels.

This is still above pre-pandemic levels in 2019.

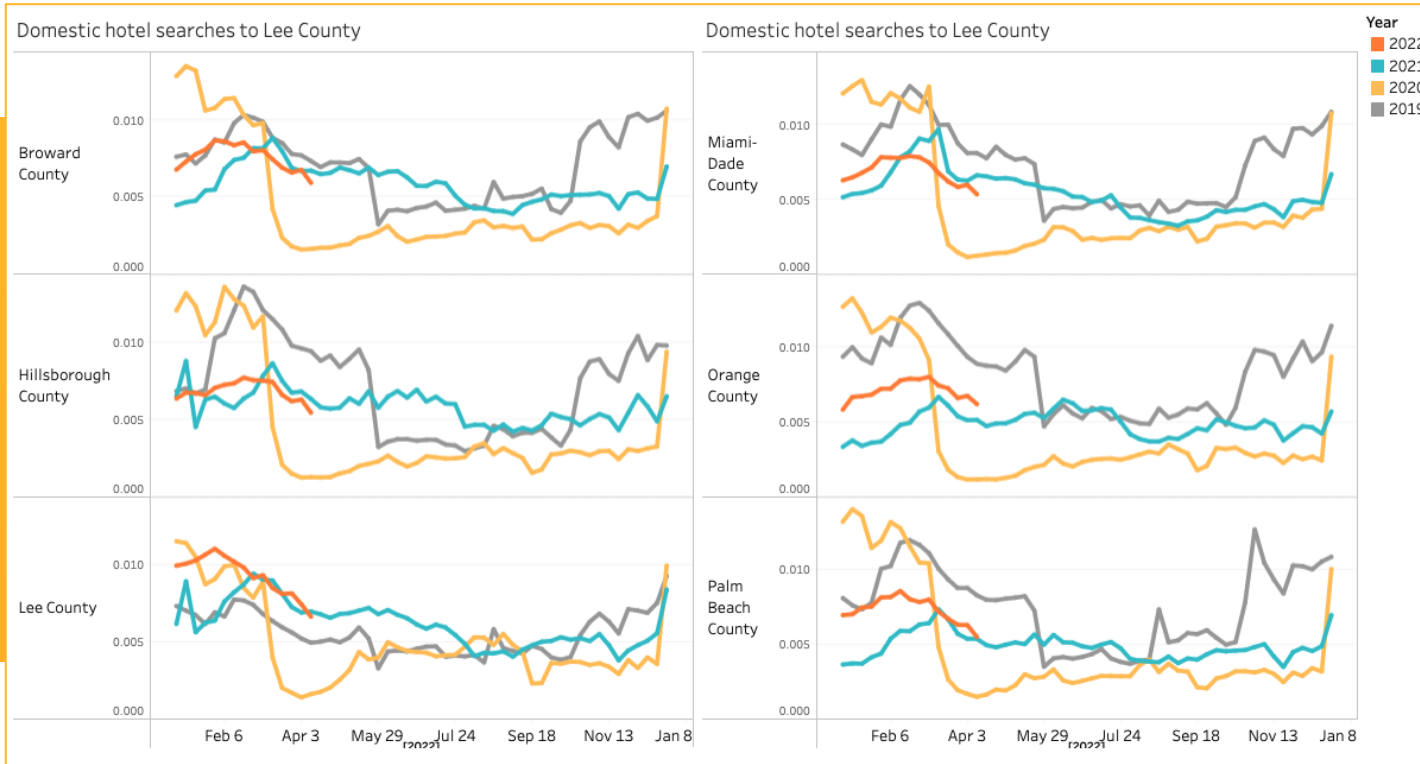
Competitive Market Comparison (Domestic)



Breakdown for domestic flight searches for competitive markets.

Hillsborough County, Orange County, and Miami-Dade County show similar behavior post-March.

Competitive Market Comparison (Domestic)



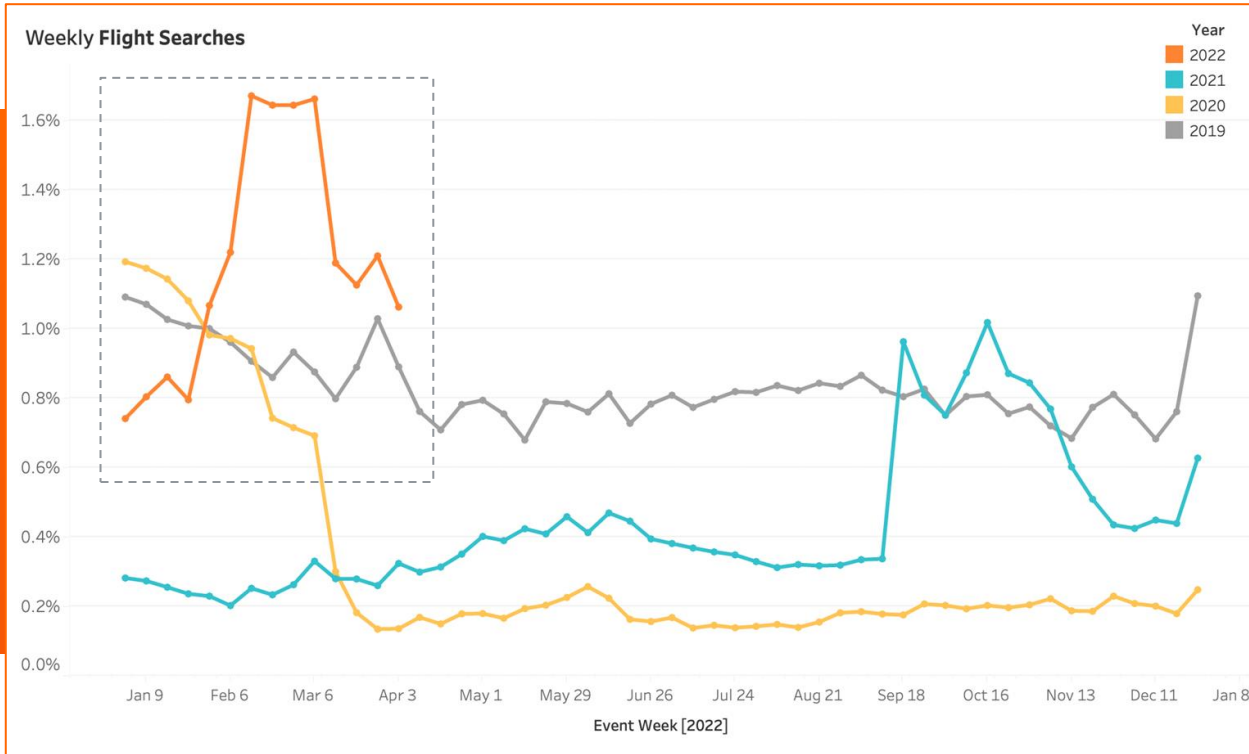
Breakdown for domestic hotel searches for competitive markets.

Lee County is the only market that shows hotel searches surpassing 2019 levels.

A scenic view of a beach at sunset. The sky is filled with soft, colorful clouds in shades of orange, yellow, and blue. In the background, a long wooden pier extends into the ocean, with several people visible on it. The foreground shows the sandy beach with some seaweed and small pools of water. The overall atmosphere is peaceful and beautiful.

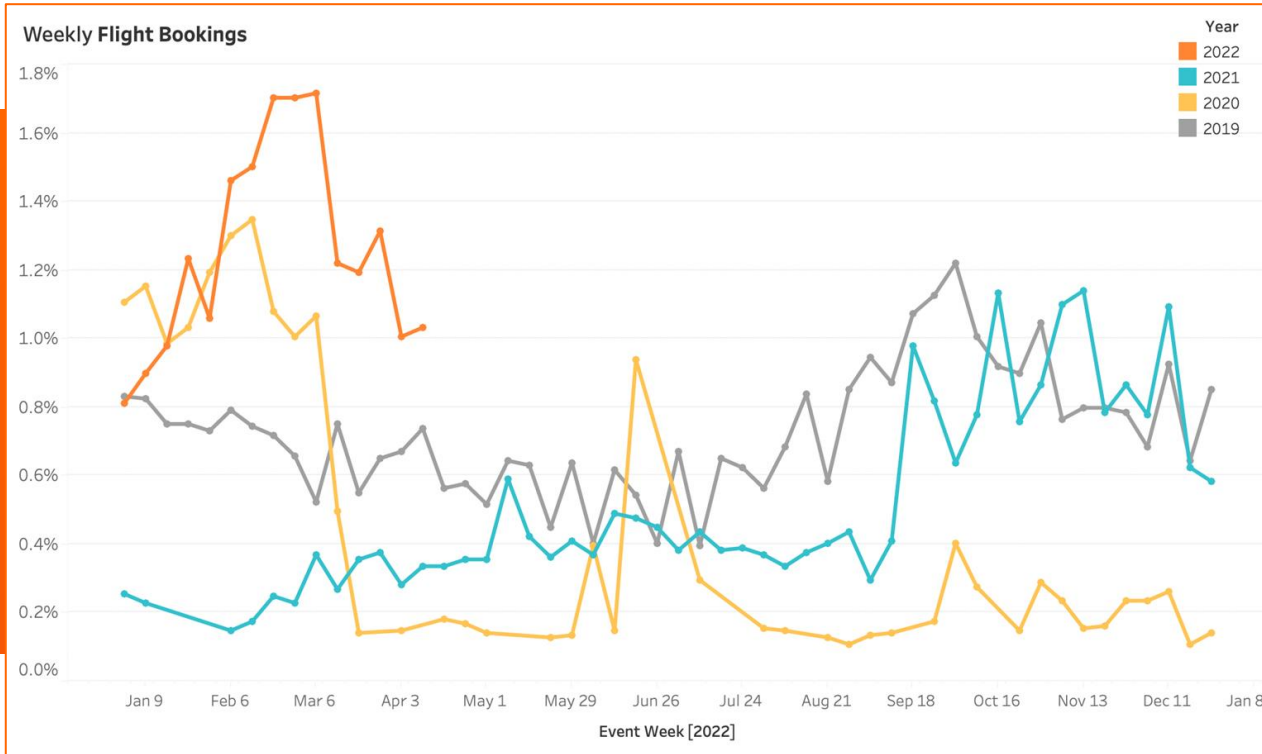
Sojern Data Shows International Travel to Florida is Back

International Flight Searches to Lee County



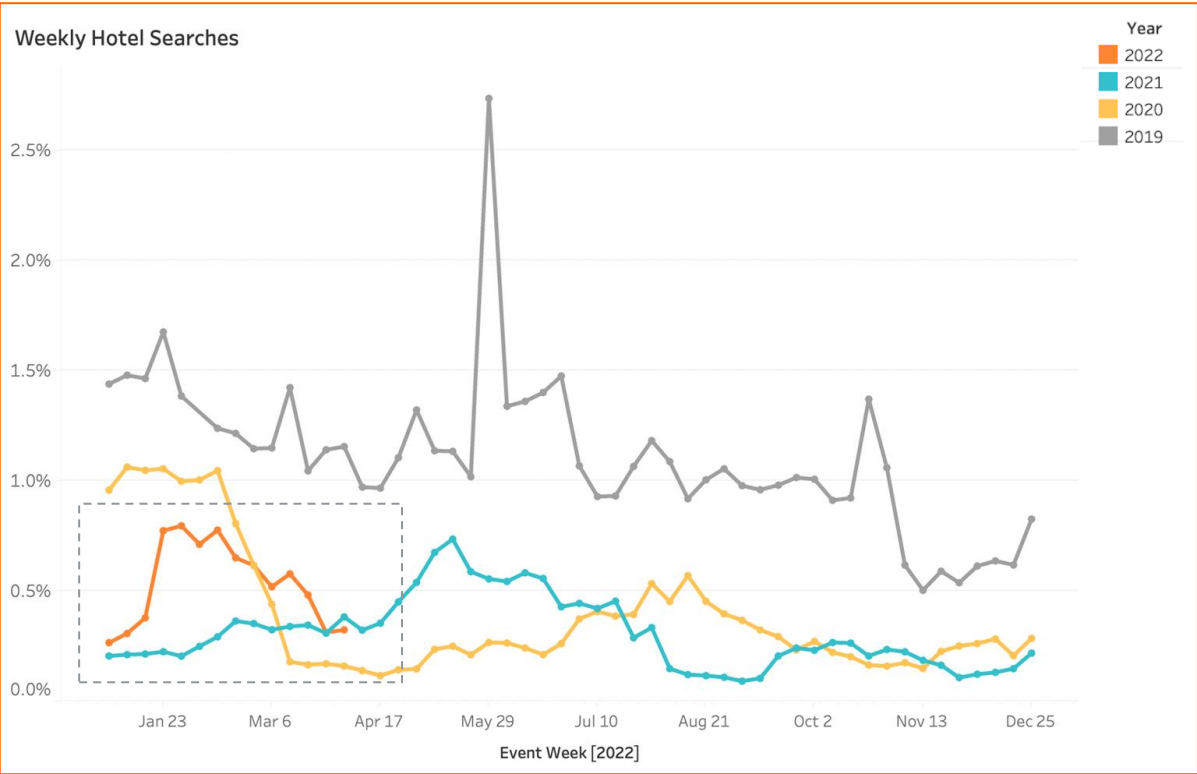
International flight searches to Lee County in 2022 has surpassed 2021 levels, and even 2019 levels

International Flight Bookings to Lee County



International flight bookings to Lee County in 2022 has surpassed 2021 levels, and even 2019 levels too

International Hotel Searches to Lee County



Hotel searches to Lee County in 2022 has also surpassed 2021 levels, although not quite at the peak of 2019 yet.

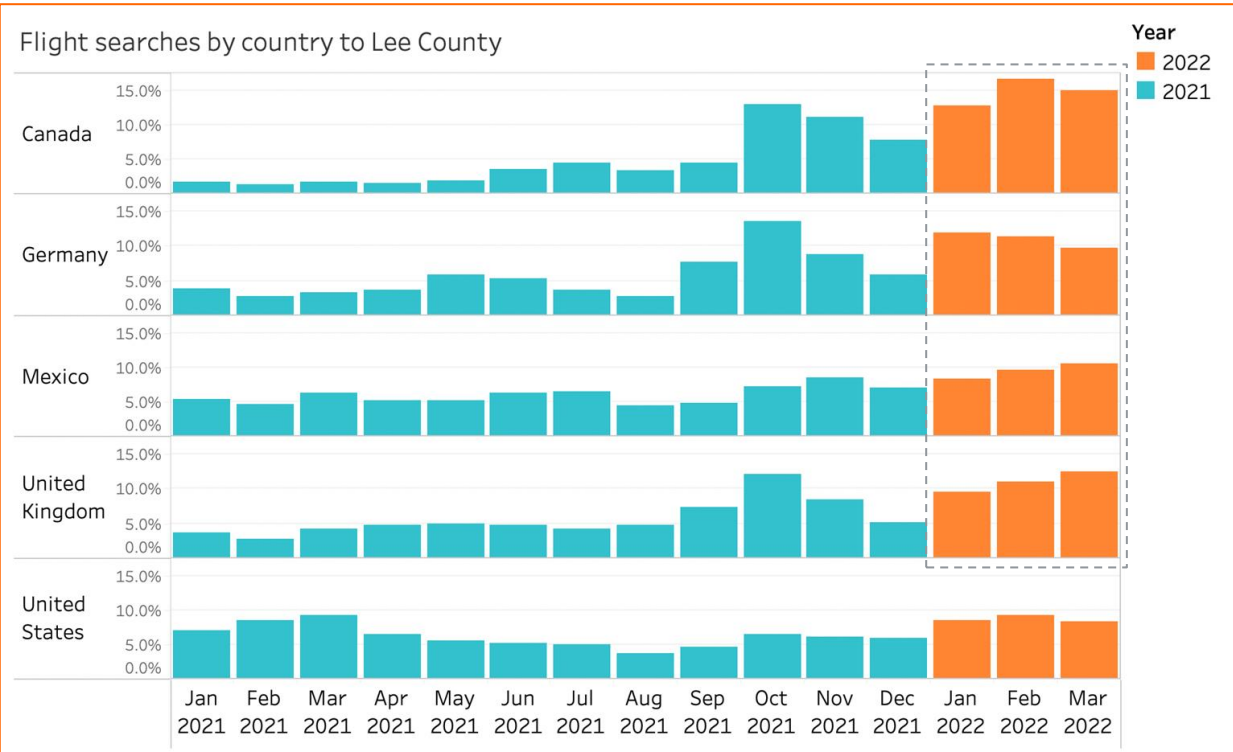
Based on flight searches in 2022, the table to the right shows the top international origin markets to Lee County ranked by volume.

Germany, Canada, UK & Mexico make up for more than 68% of all searches.

Top International Origin Countries

Rank	
1	Germany, EMEA, 32.2%
2	Canada, CA, 18.7%
3	United Kingdom, EMEA, 9.2%
4	Mexico, LATAM, 7.6%
5	Italy, EMEA, 3.4%
6	Switzerland, EMEA, 2.5%
7	France, EMEA, 2.4%
8	Spain, EMEA, 1.5%
9	Netherlands, EMEA, 1.5%
10	Ireland, EMEA, 1.4%
11	Austria, EMEA, 1.3%
12	Puerto Rico, CA, 1.3%
13	Jamaica, CA, 0.8%
14	Australia, APAC, 0.7%
15	Denmark, EMEA, 0.7%

Flight Searches to Lee County - Comparison by Country



Compared to the same period in 2021, the top international origins have increased by more than 2-3x in flight search volumes.



International Traveler Behaviors

Understanding Departure Months

Based on flight searches in Q1 2022

When are these travellers looking to stay?

Rank	Origin Country	May 2022	June 2022	July 2022	August 2022	September 2022	October 2022	November 2022	December 2022
1	Germany	16.3%	13.5%	21.2%	15.1%	8.4%	12.5%	7.5%	5.4%
2	Canada	31.0%	17.3%	13.7%	12.2%	7.9%	7.4%	3.7%	6.9%
3	United Kingdom	29.4%	10.4%	12.3%	11.4%	6.5%	15.7%	8.9%	5.5%
4	Mexico	29.0%	23.1%	12.4%	2.7%	3.1%	10.6%	13.0%	5.9%
5	Italy	25.2%	13.0%	19.6%	13.1%	9.8%	12.3%	4.0%	2.9%
6	France	23.5%	13.4%	25.6%	12.0%	5.2%	12.4%	3.7%	4.1%
7	Switzerland	12.7%	13.8%	26.5%	6.1%	7.3%	21.1%	7.4%	5.0%
8	Spain	28.1%	17.1%	17.7%	11.4%	9.9%	7.2%	4.5%	4.1%
9	Netherlands	17.5%	25.6%	13.0%	14.5%	12.9%	9.5%	3.5%	3.4%
10	Ireland	25.2%	16.0%	22.5%	8.7%	6.8%	15.4%	3.1%	2.3%

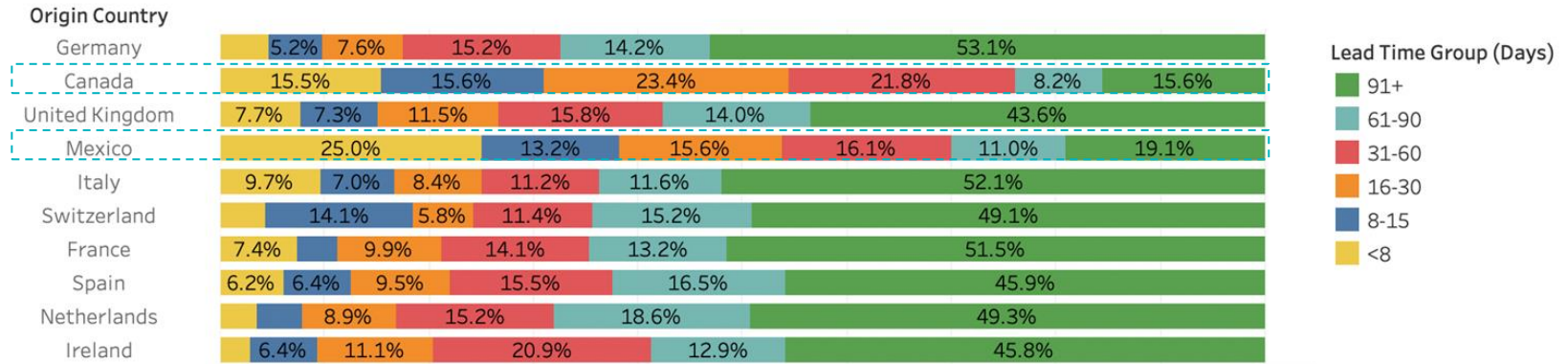
Preferred months of travel vary from origin country to country.

Based on events in the first quarter of the year, we're seeing indications of summer travel **especially in July from the EMEA markets** where travelers generally book ahead.

Understanding Lead Times

Based on flight searches in Q1 2022

How far ahead do these travellers start searching for *flights*?



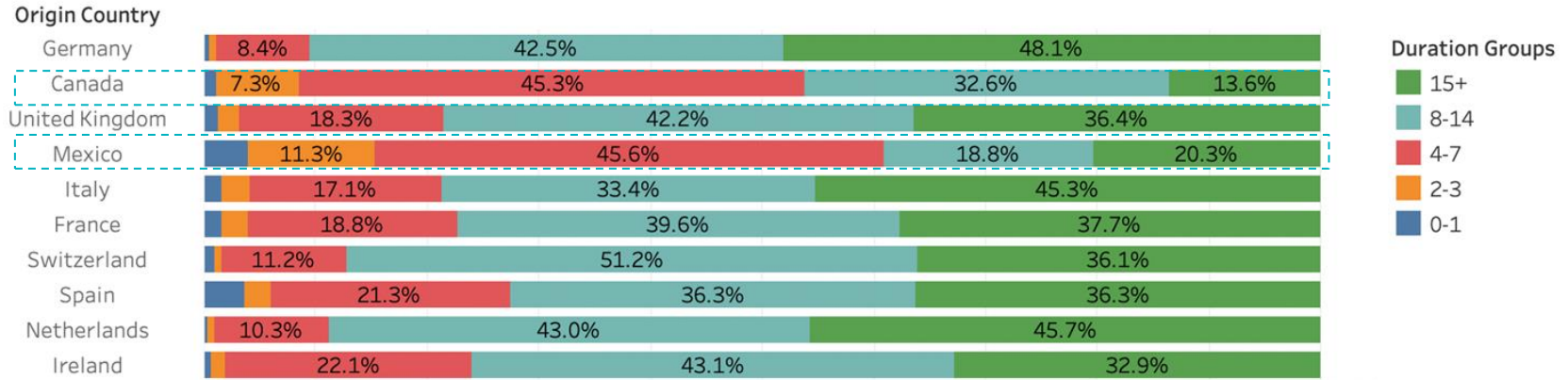
Canada & Mexico stands out as the country with the shortest lead times compared to the other top origin markets in EMEA - where **40% of travelers start looking to fly a month or less away**.

For **EMEA**, travelers start searching much earlier, about **2-3 months before** the intended date of travel.

Understanding Trip Duration

Based on flight searches in Q1 2022

How long are these travellers looking to stay?



Canada & Mexico stand out as the countries with **60%** of travelers looking to stay for **less than a week**.

For **Germany and UK**, travelers are looking to stay in town for **more than a week**.

Understanding Departure Months

Based on flight searches in Q1 2022

Couple&Solo

Origin Country	May 22	Jun 22	Jul 22	Aug 22	Sep 22	Oct 22	Nov 22	Dec 22
Germany	23.3%	12.6%	14.2%	12.2%	9.4%	14.9%	7.7%	5.6%
Canada	40.5%	16.6%	12.6%	8.3%	6.3%	4.5%	5.4%	5.8%
United Kingdom	26.5%	12.3%	12.6%	12.4%	6.9%	17.5%	5.6%	6.3%
Mexico	22.0%	20.9%	12.8%	2.5%	5.2%	10.6%	17.8%	8.1%
Italy	23.0%	13.8%	19.0%	17.0%	14.6%	7.0%	3.3%	2.4%
France	20.7%	14.2%	22.0%	13.0%	4.5%	15.5%	4.5%	5.8%
Switzerland	19.7%	10.9%	27.2%	7.9%	10.0%	13.3%	6.2%	4.8%
Spain	30.2%	19.1%	13.8%	14.7%	8.8%	2.9%	3.5%	7.0%
Netherlands	12.1%	18.5%	10.3%	19.6%	15.3%	18.1%	3.2%	2.8%
Ireland	18.5%	22.7%	15.7%	16.3%	7.0%	15.0%	3.2%	1.6%

Looking at departure months split by identifying the number of travelers has shown an interesting insight...

Families

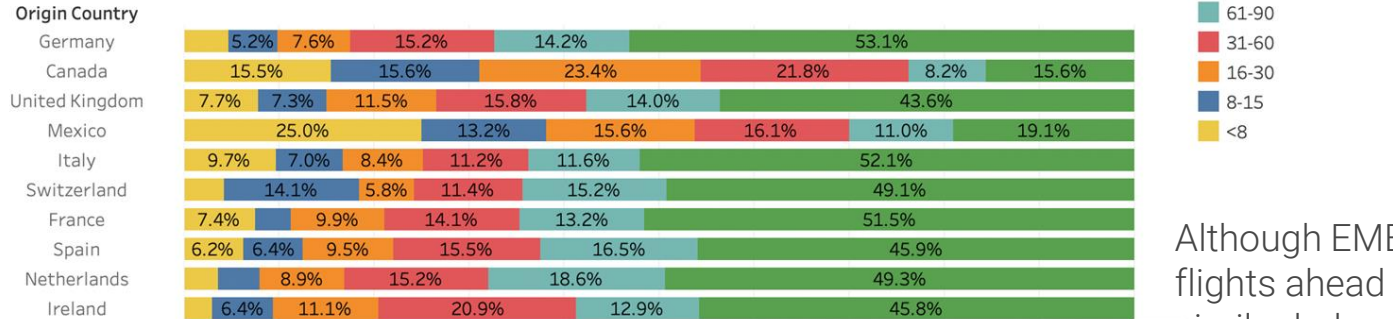
Origin Country	May 22	Jun 22	Jul 22	Aug 22	Sep 22	Oct 22	Nov 22	Dec 22
Germany	5.6%	12.9%	32.7%	22.6%	4.6%	12.4%	2.4%	6.9%
Canada	26.8%	30.6%	15.3%	3.4%	7.2%	3.0%	2.6%	11.1%
United Kingdom	11.0%	4.2%	28.5%	26.7%	2.4%	17.8%	3.3%	6.2%
Mexico	16.0%	36.0%	32.0%	12.0%				4.0%
Italy	8.8%	11.3%	27.5%	30.0%	10.0%	2.5%	2.5%	7.5%
France	4.6%	6.4%	54.1%	15.6%	1.8%	8.3%	1.8%	7.3%
Netherlands	9.7%	16.7%	38.9%	11.1%	6.9%	2.8%	5.6%	8.3%
Spain	26.1%	8.7%	8.7%	26.1%	8.7%	13.0%		8.7%
Switzerland	4.1%	14.2%	40.8%	6.4%	1.8%	19.7%	6.9%	6.0%
Ireland	4.1%	32.4%	23.0%	12.2%	1.4%	6.8%	9.5%	10.8%

The strong summer trend comes from **families** - where they look to travel to Fort Myers in the months of **July**.

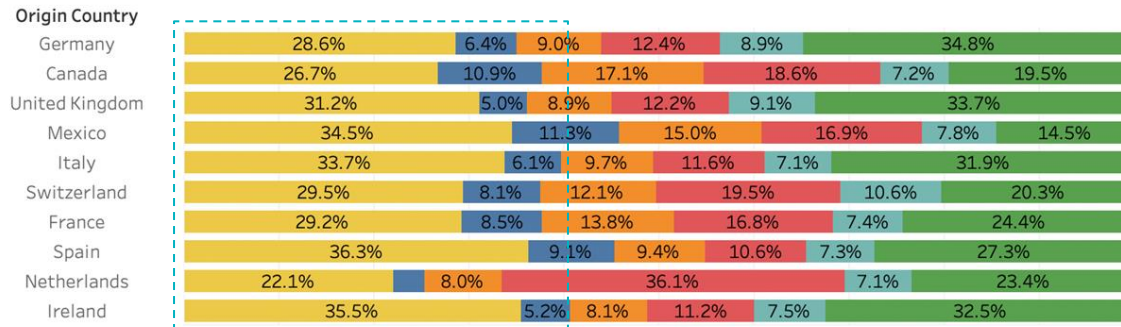
Comparing Flights & Hotels Trends

Based on searches in Q1 2022

How far ahead do these travellers start searching for flights?



How far ahead do these travellers start searching for hotels?



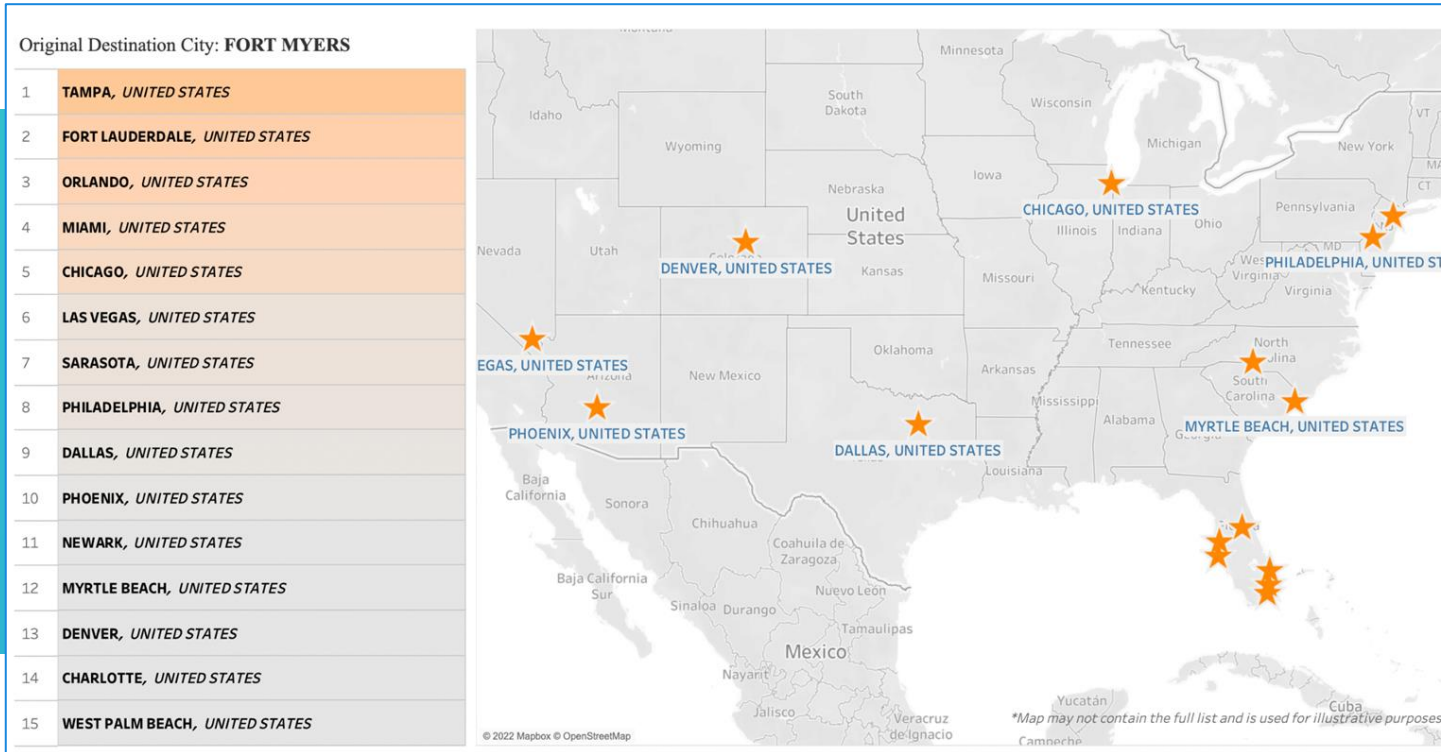
Although EMEA travelers look for flights ahead of time, they show similar behavior to Mexico travelers when it comes to hotels i.e. **booking less than a month away.**

Hoteliers should **continue to strongly advertise for summer travel** to capture the conversions that they should see coming!

An aerial photograph of a coastal city, likely Miami, showing a large body of water, a long bridge, and a dense urban area with many buildings. The sky is blue with scattered white clouds. The text "A Look at Competitive Destinations" is overlaid in white, bold, sans-serif font across the center of the image.

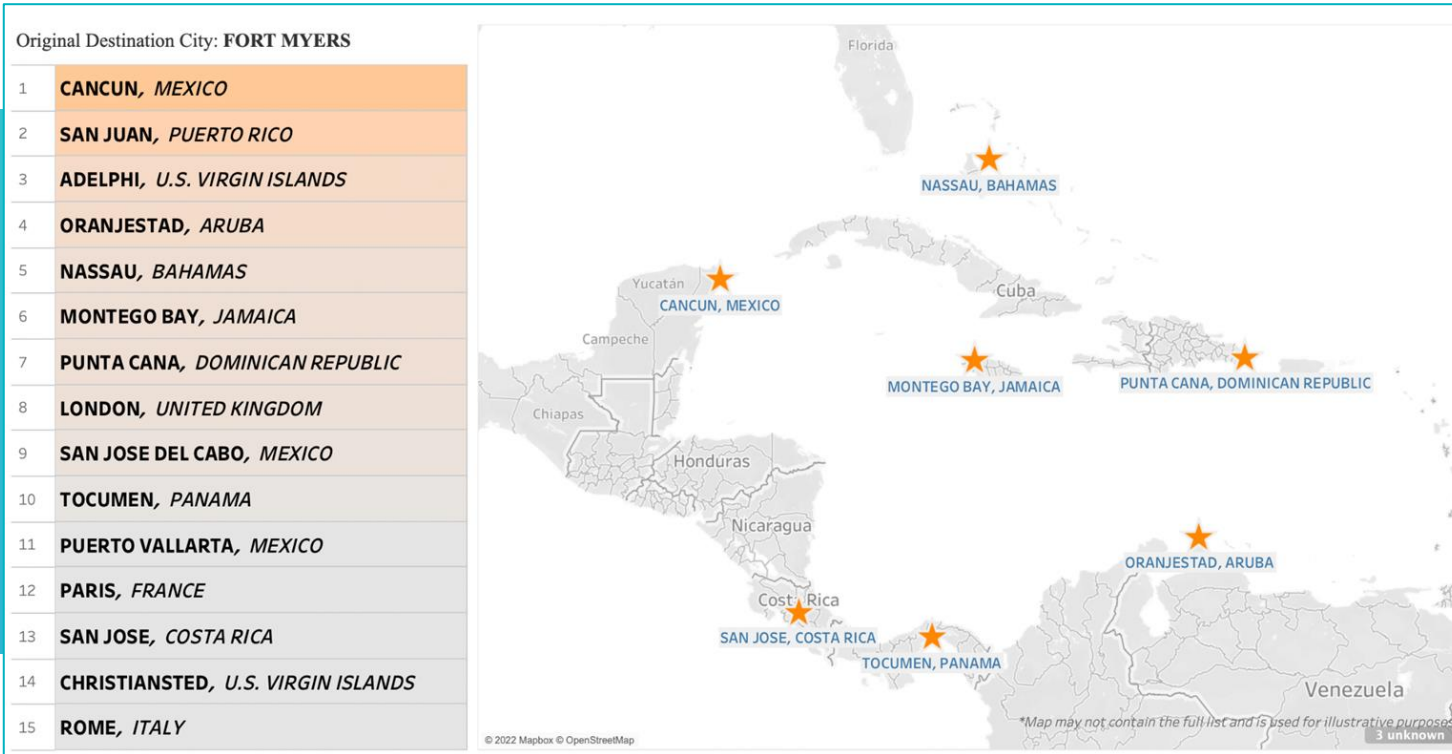
A Look at Competitive Destinations

Domestic Competitive Destinations



These are the other top domestic cities searched for by travelers searching for Fort Myers.

International Competitive Destinations



These are the other top international cities searched for by travelers searching for Fort Myers (excluding US cities).

What Can You Do To Drive Travelers?

Inspire Travelers Before They Book



Focus on intent (prospecting) data to inspire travelers before they've decided where to go but are actively looking for next trip.

Encourage International Loyalty



Market to travelers from important international markets who came to see you before the pandemic to come back to Lee County again—intent is high!

Promote Longer Trips



Encourage international travelers to stay longer by sharing activities and restaurants in area, even local grocery stores.

Keep Safety Protocols Front & Center



Share updates on policies, travelers want to be in the know. If masks aren't required, let them know. Especially important for international travelers.

Remain Always On



International travel is back and domestic remains strong. Travelers are always searching for their next trip and you need to be there when they are.



Thank You!

