



# 2022 Trends & Insights



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# What we're going to cover today

- US Travel Trends
- Competitive Outlook
- Vrbo Insights
- International Trends



Lee County

# US Book & Search Trends



# Lee County Search Trends

Travel May – September 2022



**33%**

of accommodation  
searches were for  
Vacation Rentals



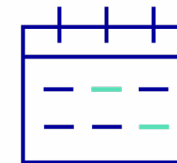
Hotel represents 27% of  
accommodation  
searches



Miami is the top Feeder  
market for searches



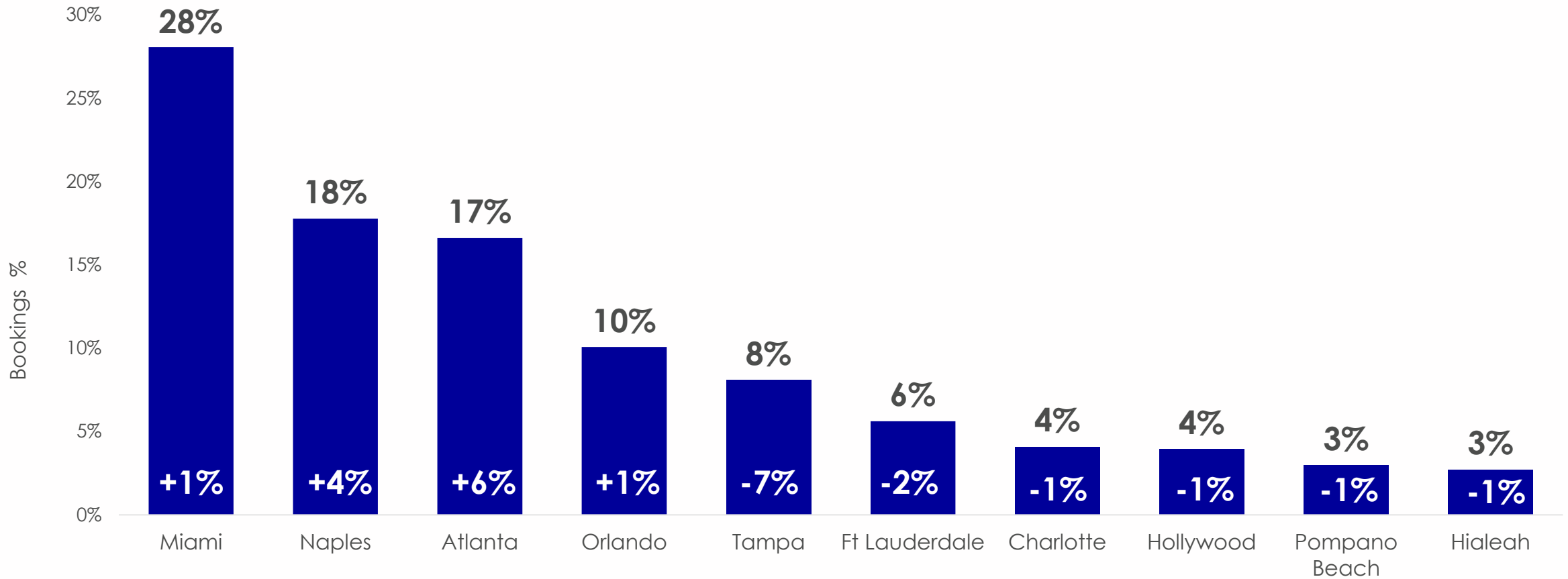
Over 52% of searches are  
from mobile web & app



Search windows of 0 - 30  
Days represents 44% of  
the total searches

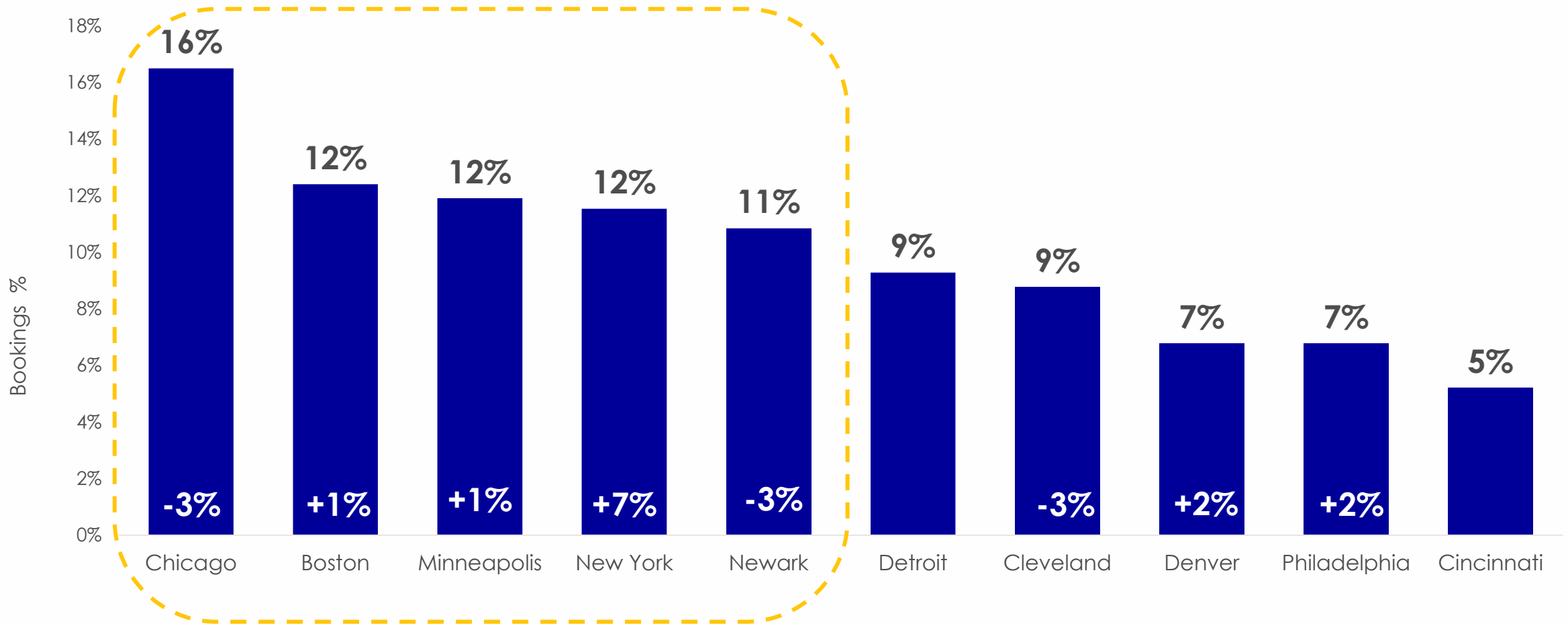
# Top 10 Drive feeder markets

Miami, Naples & Atlanta represent 63% of drive market searches.  
Atlanta has the largest YoY increase with +6%

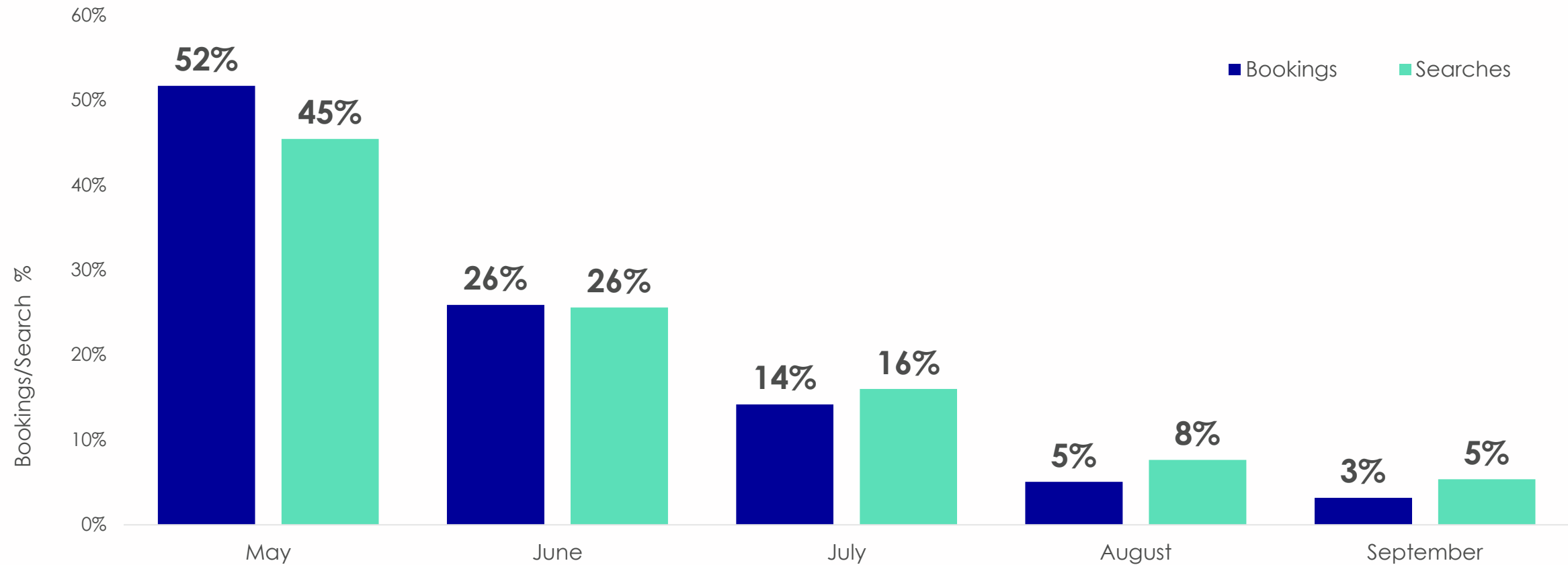


# Top 10 Fly feeder markets

The top 5 cities represent 63% of fly market searches. New York has the largest YoY increase with +7%



# Bookings and Searches for upcoming travel months

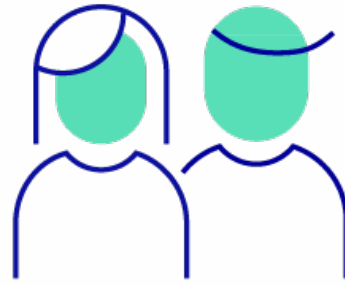


Expedia Group

# US Audience



Couples make up majority of travelers visiting Lee County. Families have the highest room night spend.



### Two Adults

Share: 50%

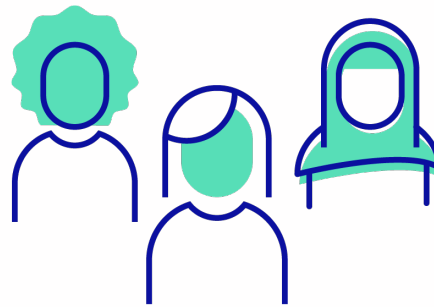
Avg. Room Night Spend: \$226



### Family Travelers

Share: 33%

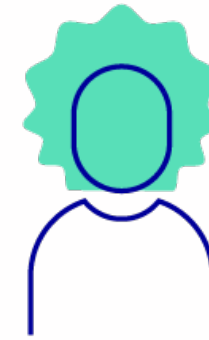
Avg. Room Night Spend: \$303



### Multiple Adults

Share: 14%

Avg. Room Night Spend: \$292



### Single Travelers

Share: 3%

Avg. Room Night Spend: \$188

Expedia's audience tends to book standalone hotel or flight bookings, and 67% of travelers book a 3 or 4 star property.

## Standalone / package:



85% Standalone



15% Packages

## Property rating:

11% book 4  properties

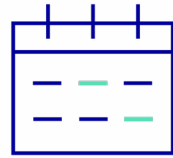
56% book 3  properties

34% book 2  properties

# Majority of Travelers stay 3 nights with an average daily rate of \$245.

We are seeing prices increase for upcoming travel months compared to 2021, +\$36 for Average Daily Rate and +\$87 Average Ticket Price.

## Hotel Stays by day of week:



51% Weekends

49% Weekdays

## Average length of stay:



3.2  
Nights

## Average daily rate :



\$245  
Per Room Nights

## Average Ticket Price:

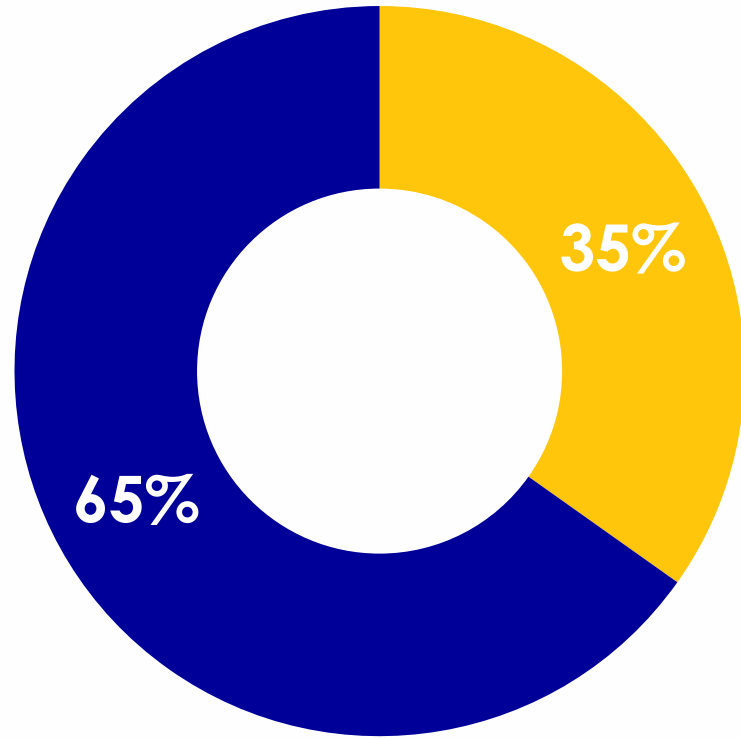


\$281  
Per Tickets

Lee County

# US Competitive Outlook

## Number of Destinations Considered



■ 2+ destinations considered  
■ 1 destination considered

## JUST OVER ONE-THIRD OF ONLINE TRAVEL BOOKERS STARTED WITH MULTIPLE DESTINATIONS IN MIND

Even more millennials consider multiple destinations



# 42%

OF MILLENNIALS TRAVEL BOOKERS CONSIDERED 2+ DESTINATIONS.

# Domestic customers who searched for Lee County also searched for:



Miami



Orlando



Tampa



Naples

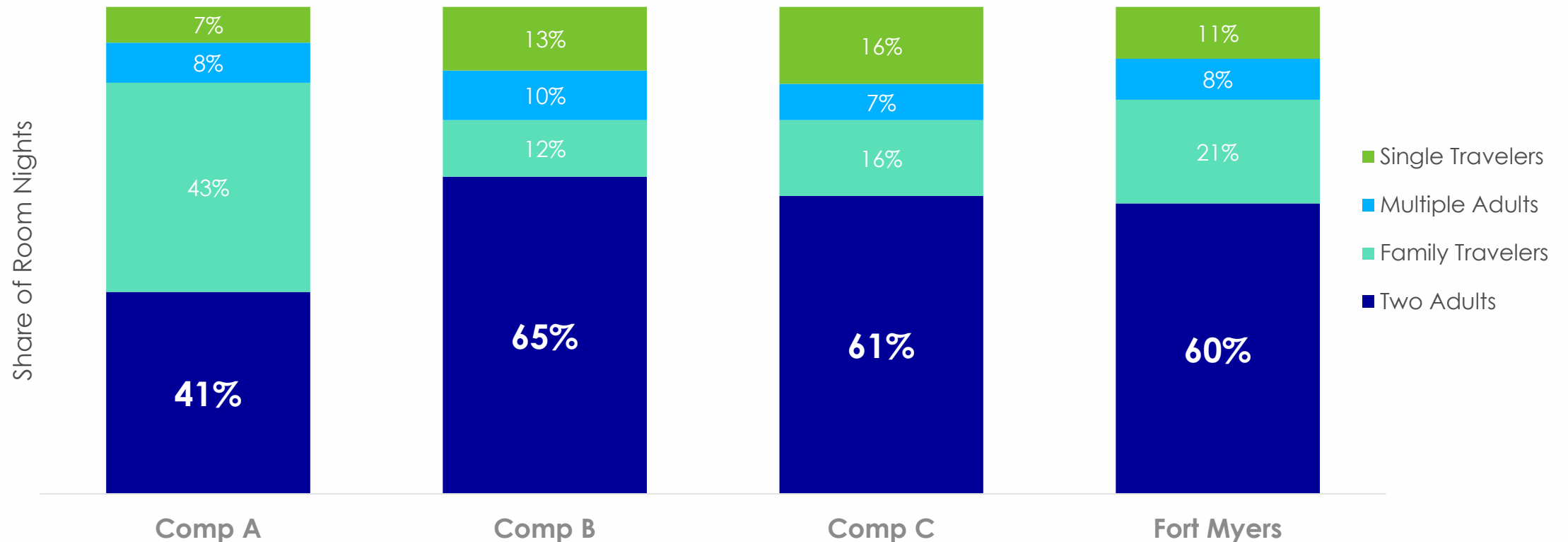


Fort  
Lauderdale



# Traveler audience compared to comp set

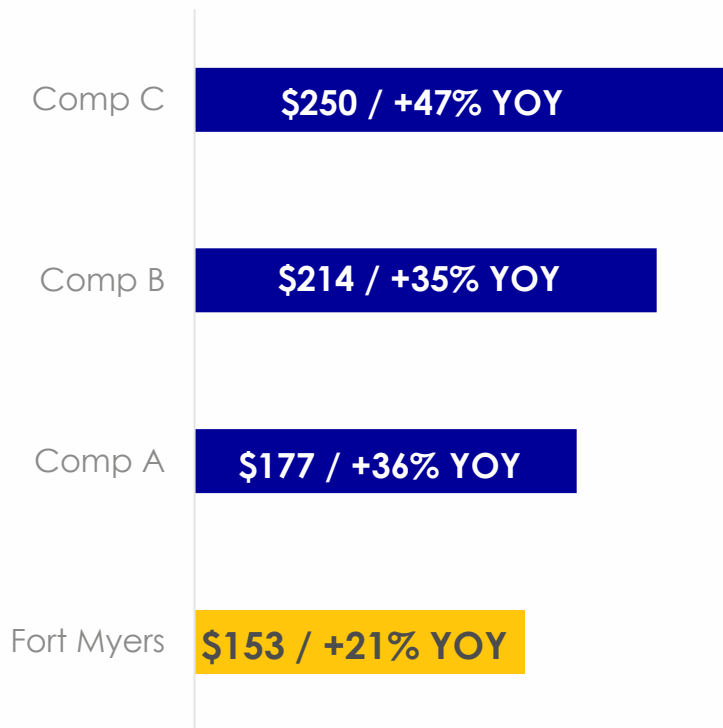
Lee County has a similar traveler mix as two of its competing destinations



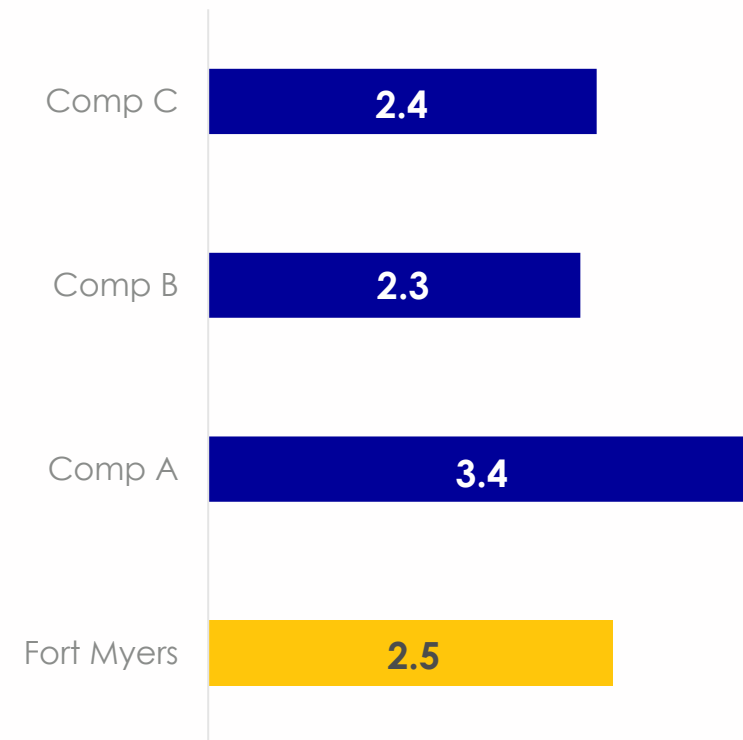
**Fort Myers  
offers the most  
competitive  
rates  
compared to  
the comp set.**



### Average Daily Rate



### Average Length of Stay



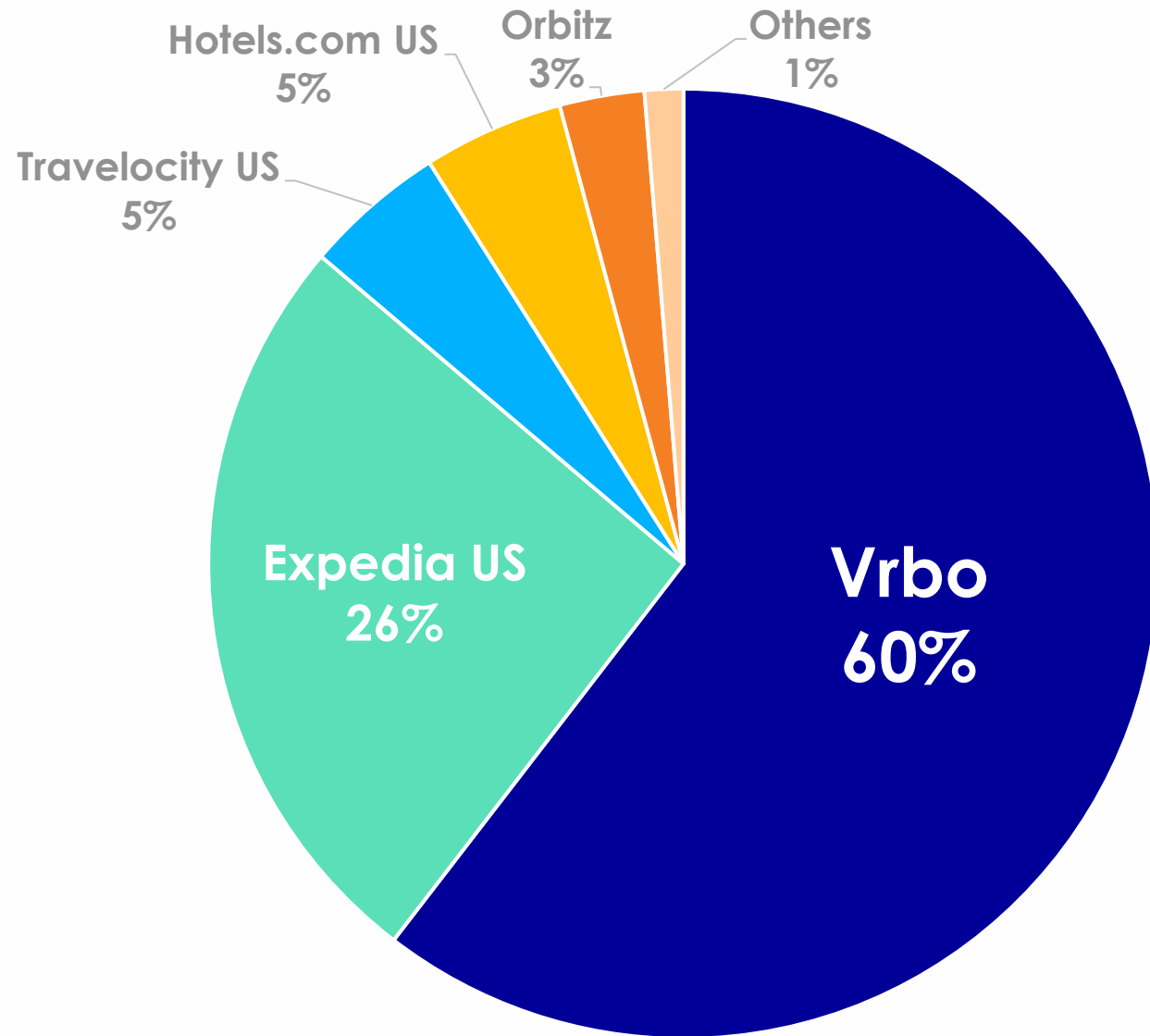
Source: 1st Party Expedia Group Book Data (Gross)  
Report Date: 4/15/22 / Stay Date Range(s): 5/1/22-9/30/22  
Line of Business: Hotels, Flights  
Points of Sale used: United States of America  
Competitors: Orlando, Tampa, Miami

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Lee County

# Vrbo US Trends

**Vrbo is the #1  
Expedia Group  
brand for Lee  
County at 60%  
followed by  
Expedia.com  
at 26%**



# Lee County Vrbo Booking Trends

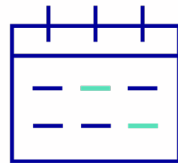
Travel May – September 2022



**70%**  
bookings were for  
Houses

Cape Carol and Fort  
Myers beach were the  
top booked locations

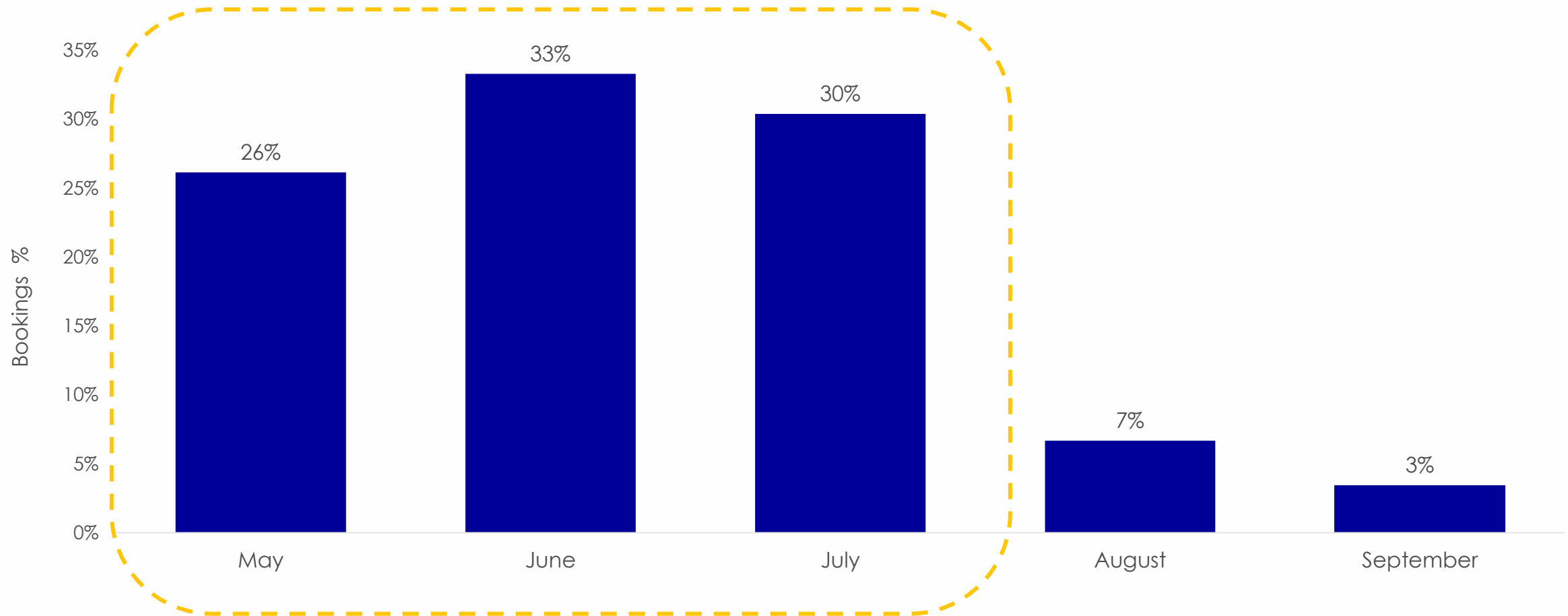
Condos represent 16% of  
bookings for Lee County



Travelers are booking further out.  
Booking window of 91+ Days represents  
79% of the total bookings compared to  
68% in 2021

# Vrbo bookings for the upcoming travel months

May, June & July have largest booking share, however we still have time to grow business for July-Sept due to booking window





Families make up majority of Vrbo travelers visiting Lee County, and have the highest average booking spend per stay with average length of stay at 7 nights.



### Family Travelers

Share: 61%

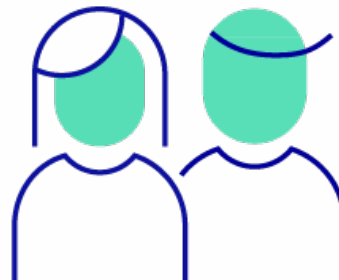
Avg. Spend on Bookings: \$3,691



### Multiple Adults

Share: 30%

Avg. Spend on Bookings: \$3,355



### Two Adults

Share: 8%

Avg. Spend on Bookings: \$1,865



### Single Travelers

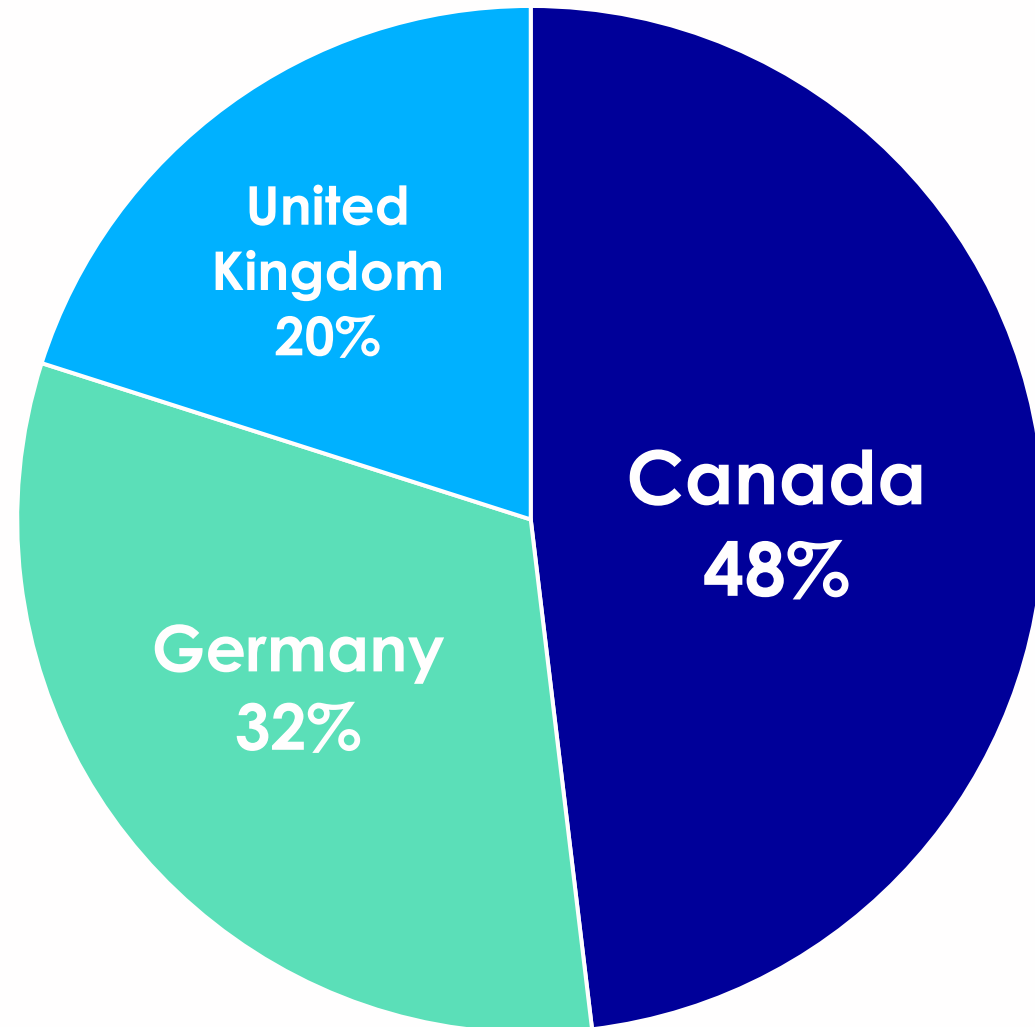
Share: 1%

Avg. Spend on Bookings: \$3,206

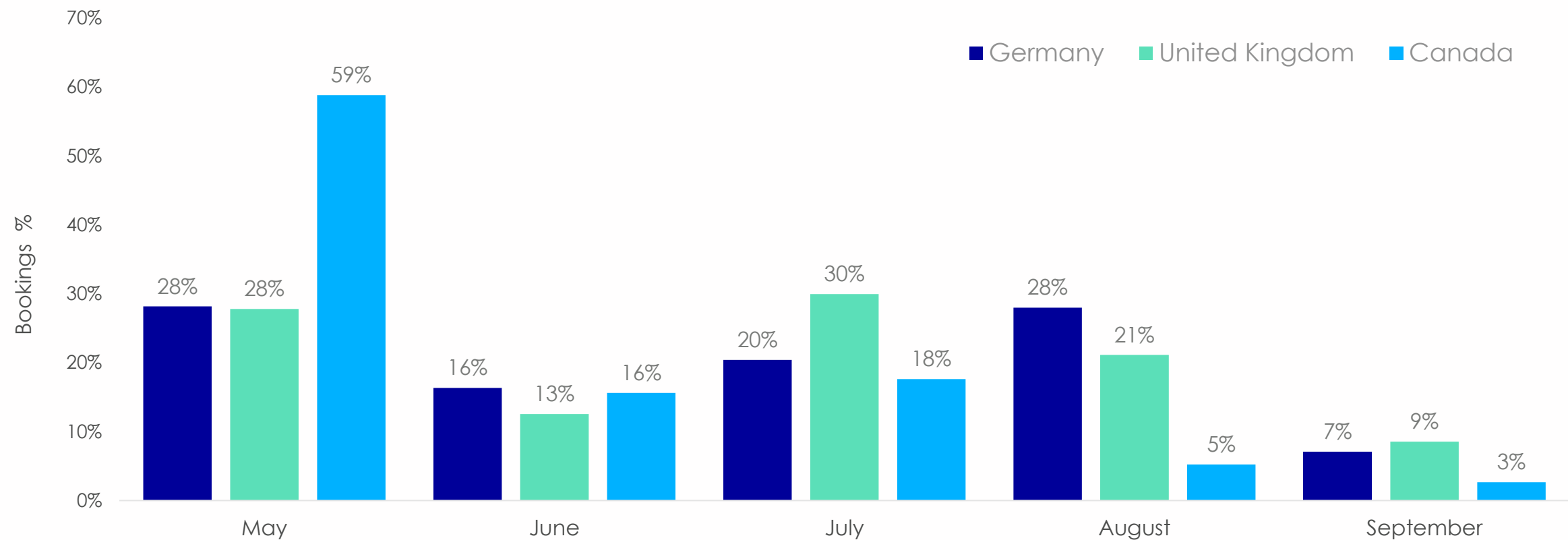
Lee County

# **International Book & Search Trends**

Canada holds  
majority of  
Traveler  
bookings to  
Lee County at  
48%



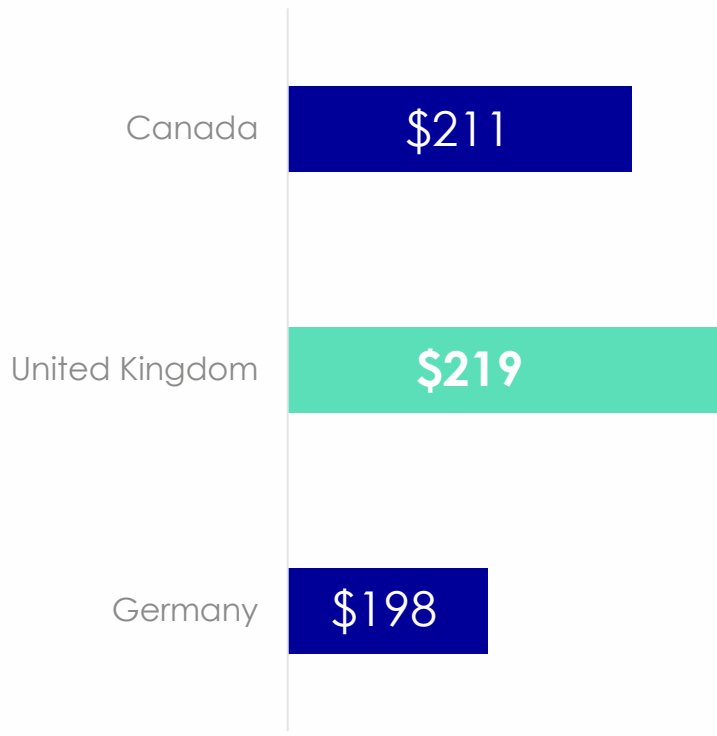
# Highest booking month for Canada is May, UK is July, and Germany is May & August.



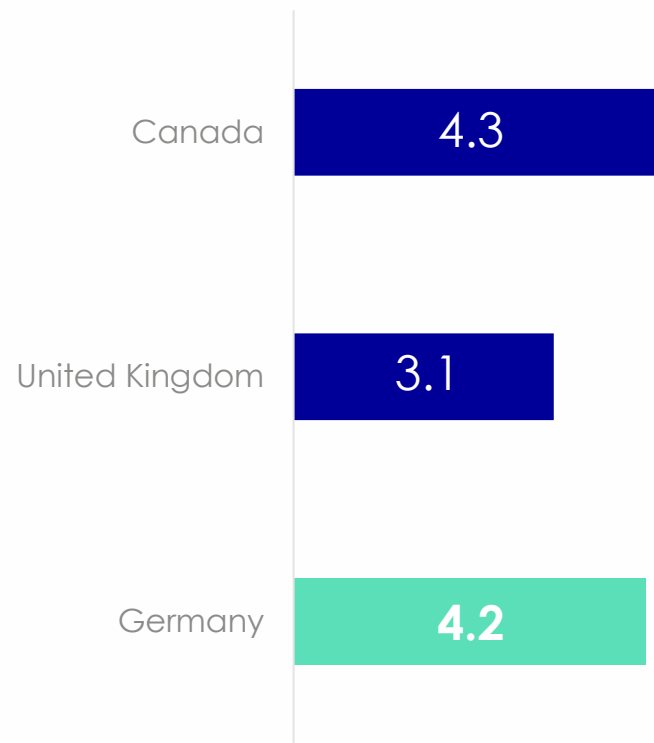
UK Travelers have the highest average daily rate and German Travelers have the longest length of stay.



Average Daily Rate



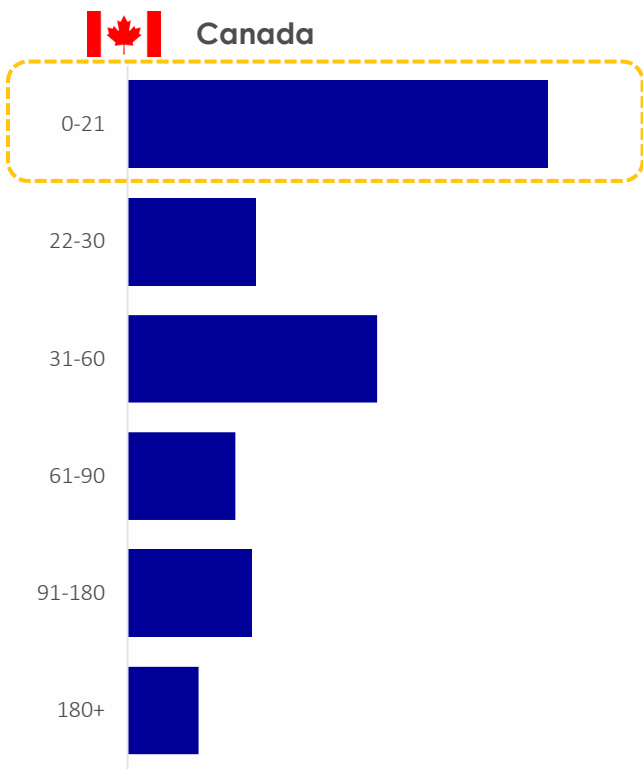
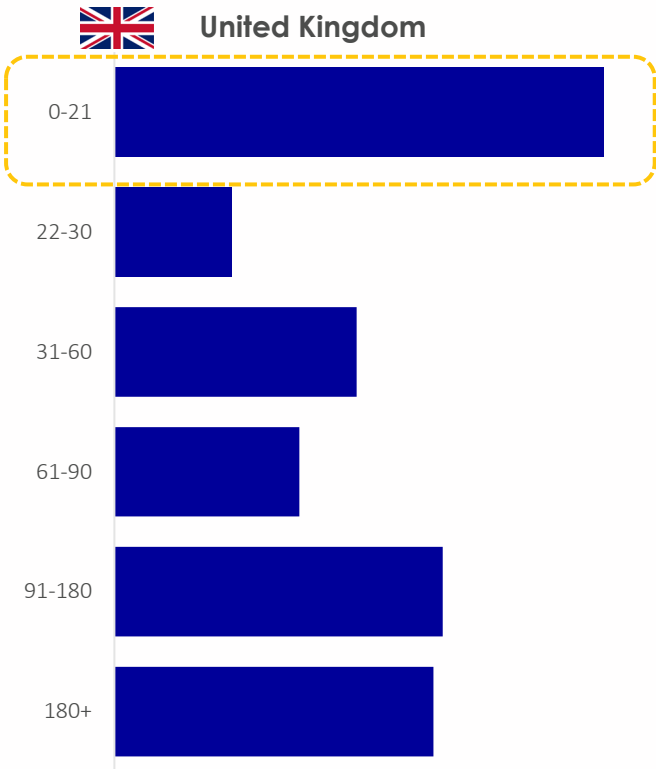
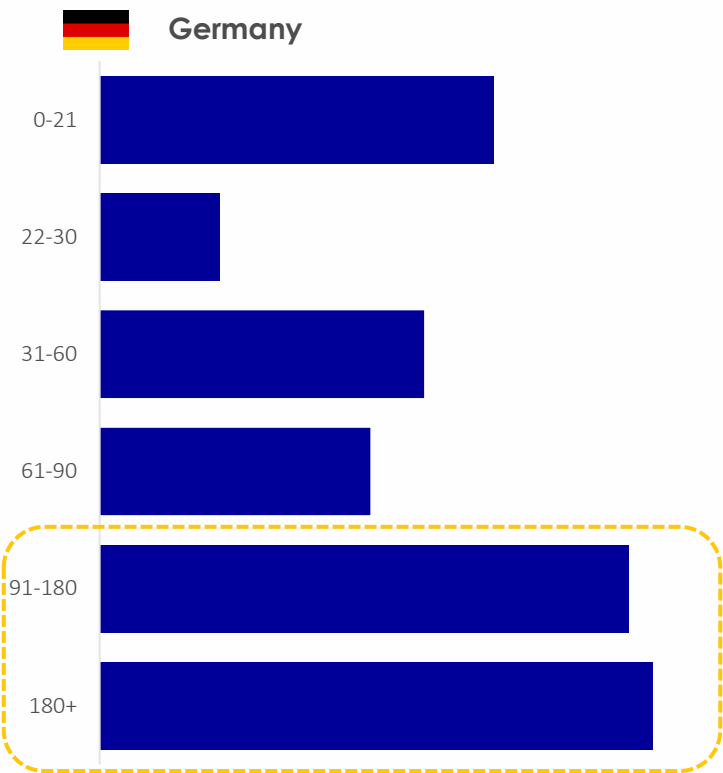
Average Length of Stay



Source: 1st Party Expedia Group Book Data (Gross)  
Report Date: 4/15/22 / Stay Date Range(s): 5/1/22-9/30/22  
Line of Business: Hotels, Flights  
Points of Sale used: Germany, Canada and UK  
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# Search to travel window by country

Searches for Lee County primarily occur 0-21 days out for UK and Canada. From Germany, search windows are longer with most occurring 91+Days prior to travel.





Q1 2022

# Travel Trend Report

- Travel Searches Surge as Restrictions Ease
- Growing Traveler Confidence = Longer Search Windows
- Big Cities & Beaches Maintain Appeal
- Lodging Performance on the Rise
- Growing Demand & Opportunities for Sustainable Travel

[expedia.gp/Q1-Insights](https://expedia.gp/Q1-Insights)

2022 | Q1

## Travel Trend Report



# Insights Summary

- 1 Miami is the top feeder market. Atlanta and NYC have the largest YoY search increases
- 2 Largest booked US traveler audience is two adults except for Vrbo it's families. Families have the highest spend for all EG brands.
- 3 Most US searches occur 0 - 30 Days prior to arrival, 0-21 days for UK and Canada, and 91+ days for Germany and Vrbo
- 4 Be mindful of competing destinations, not just your comp set in Lee County
- 5 Trusted Travel Advisors, our Media Solutions and Lodging teams can use our exclusive 1<sup>st</sup> party to help you develop a custom strategy





THANK YOU



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