



LEE COUNTY PARTNER INSIGHTS

Linda Zimmerman | Sr. Business Development Manager

Rachel Helms | Associate Market Manager



OTA Landscape Bring Travelers to Your Destination

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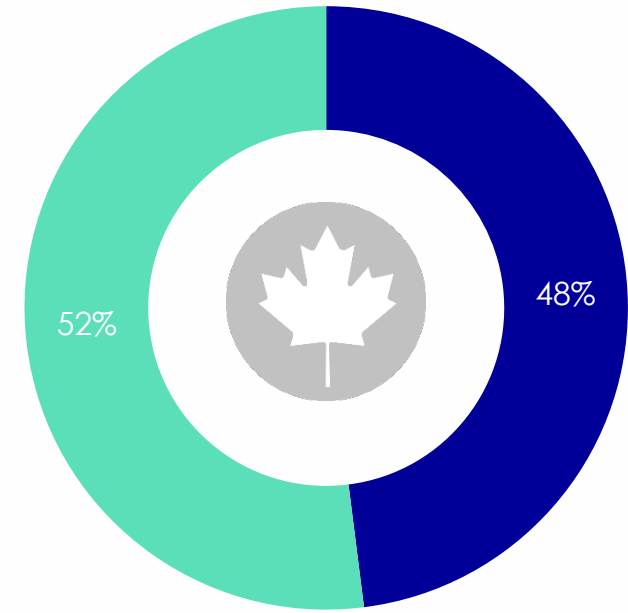
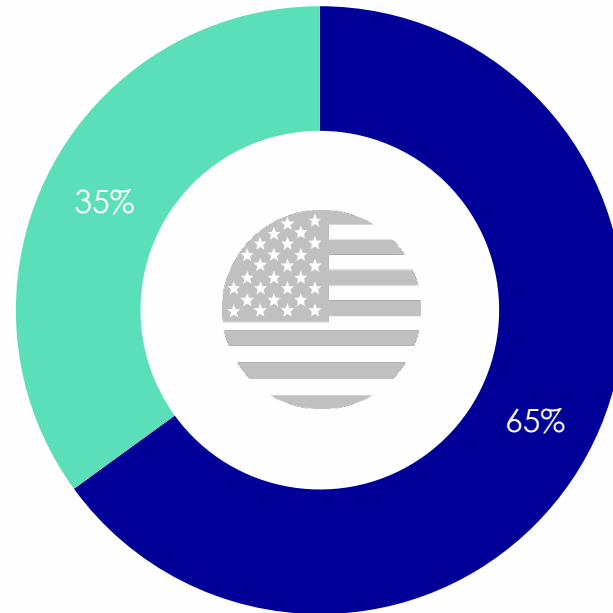
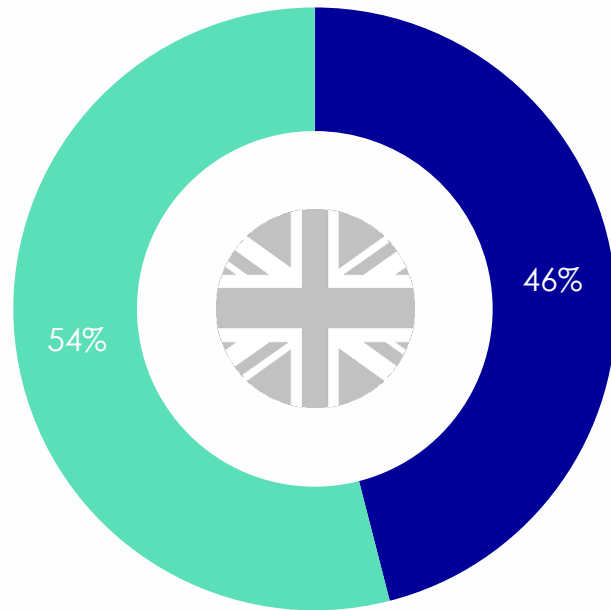
media solutions

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Traveler's Destination Selection

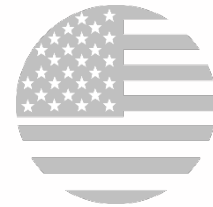
Around half of travel consumers have more than one destination in mind during their travel shopping



■ 1 Destination Considered

■ 2+ Destination Considered

Destination Selection is Not a Linear Path



WEEK 6 BEFORE

WEEK 5 BEFORE

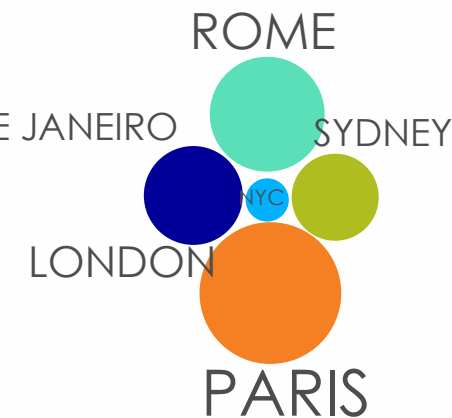
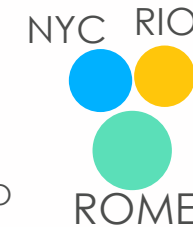
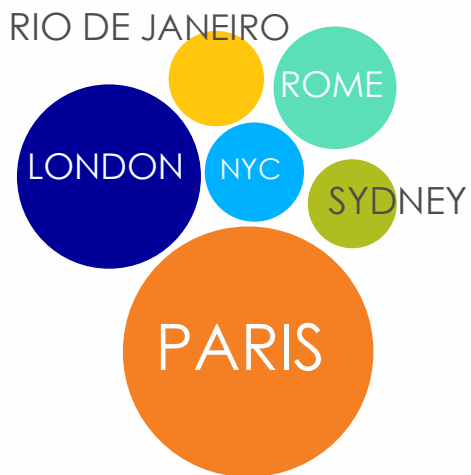
WEEK 4 BEFORE

WEEK 3 BEFORE

WEEK 2 BEFORE

WEEK 1 BEFORE

WEEK OF BOOKING



Travel is a Complex & Considered Purchase:

Travel consumers make
140 travel site visits
on average prior to booking

Data Source: comScore UK, US, CA Desktop Panels, Custom Path to Booking Visitation Analysis, Share of Total Visits, Online Travel Booker Segment: Dec '15 – Feb '16

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 media solutions

5

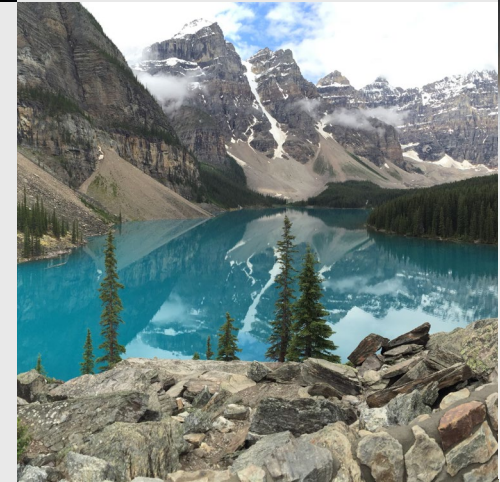
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121



140

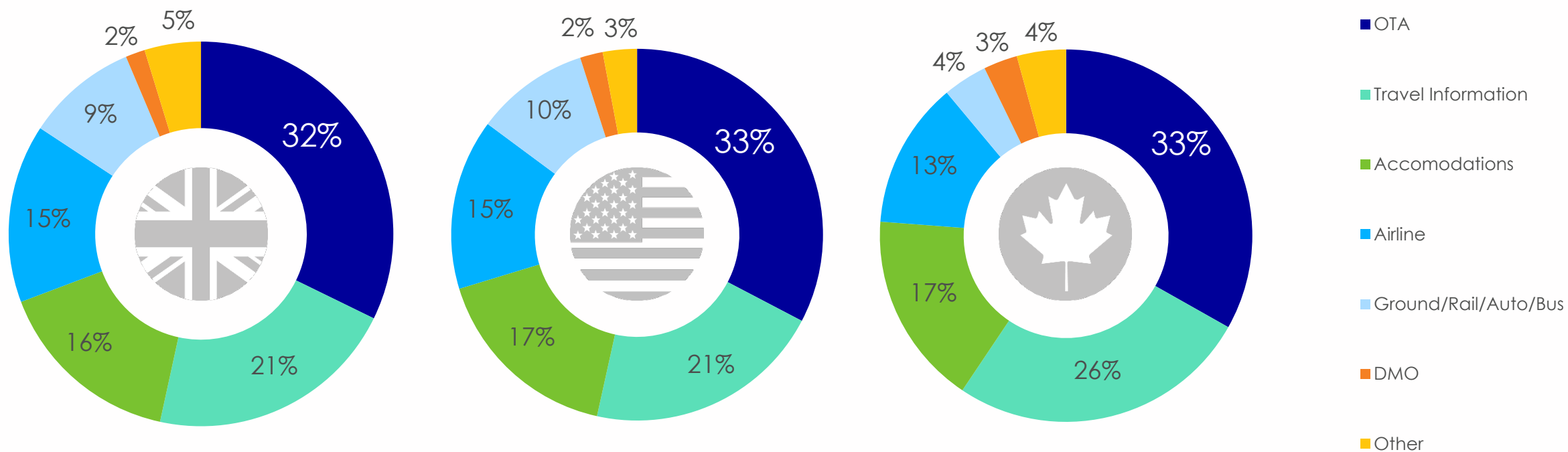


161

Online Travel Agencies (OTAs) Reach:

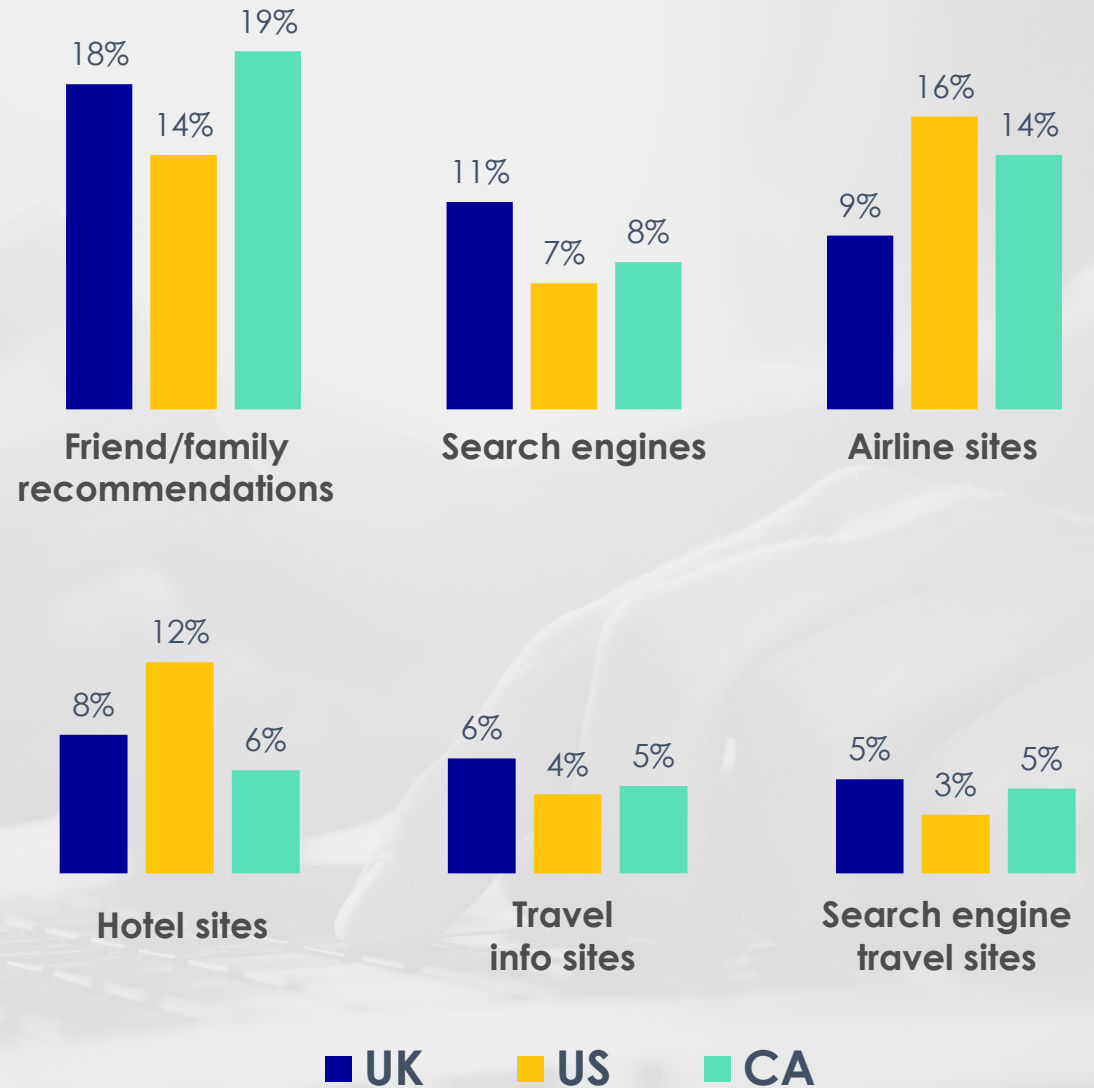
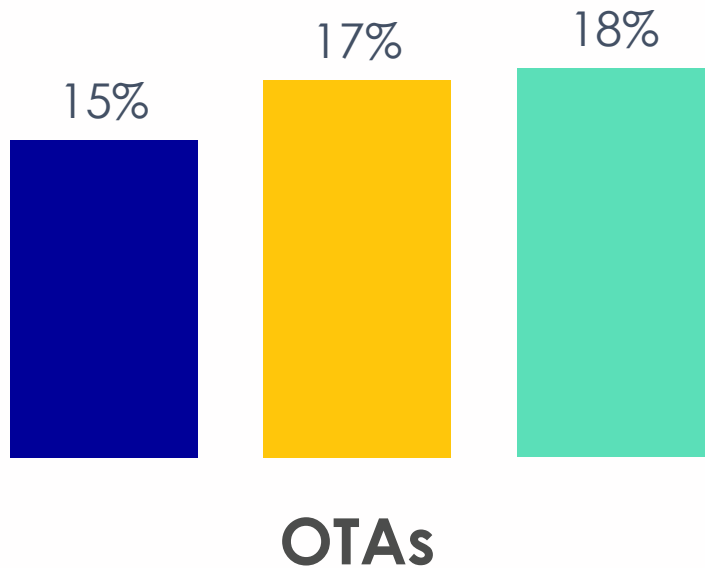
OTAs have the largest share of site visitation across the consumer travel journey

Total Visits Share Throughout 45 Day Path to Booking



Most Influential Resources for Destination Selection

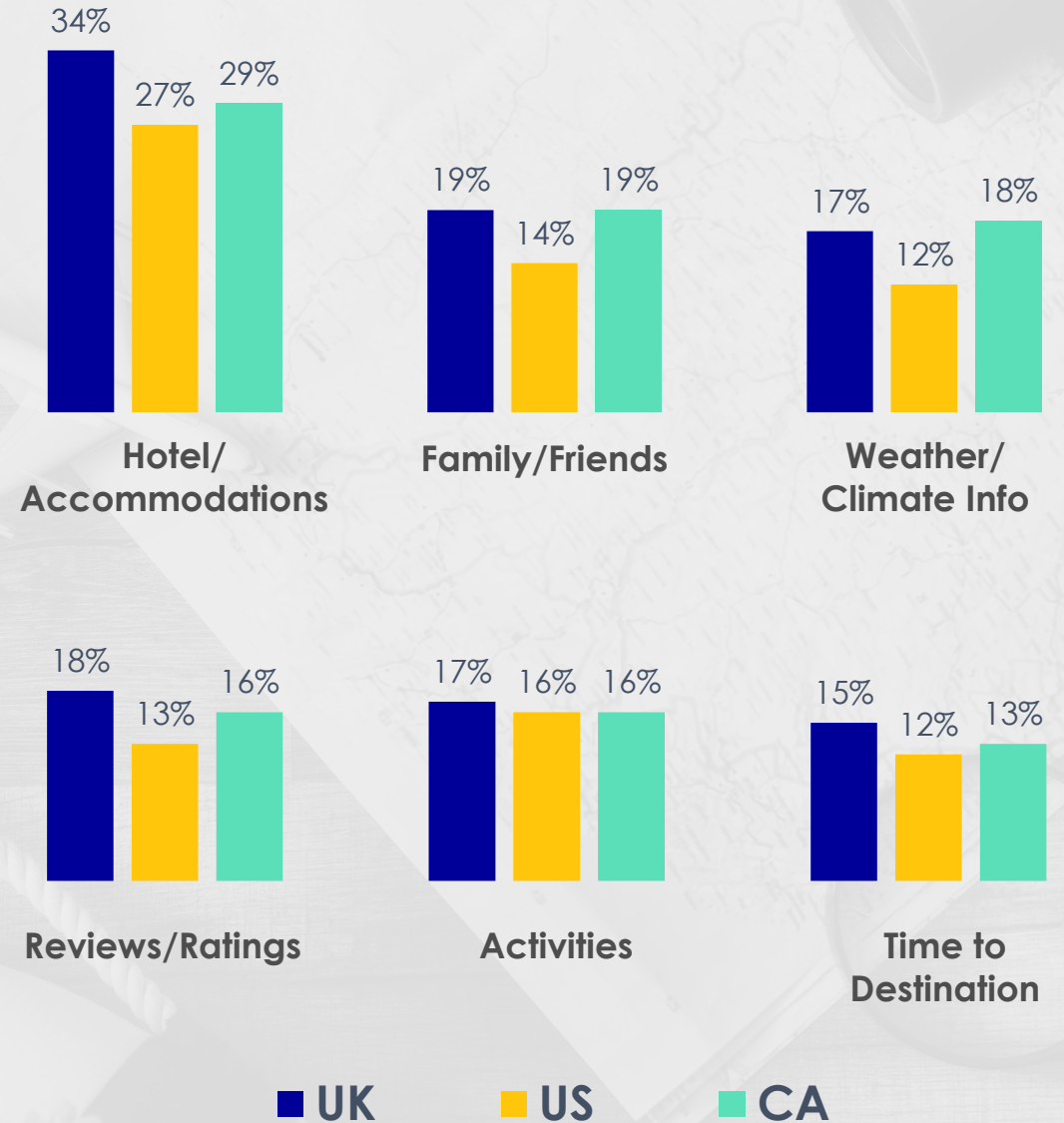
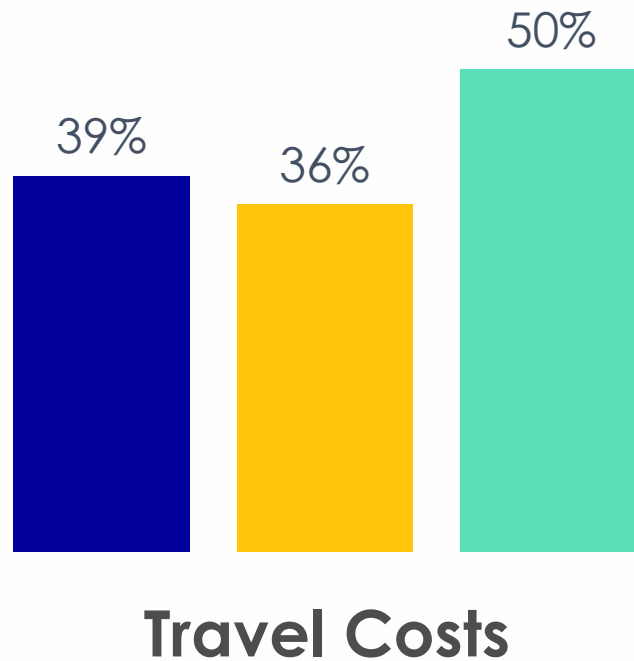
OTAs are the influential online resource



Data Source: comScore Survey 2016, PLEASE RANK THE TOP THREE RESOURCES THAT INFLUENCED YOUR DESTINATION DECISION. Among UK Online Travel Buyers Who Used Resources (n=780). Among Total U.S. Online Travel Bookers (n=758). Among Total CA Online Travel Bookers (n=778)

Most Influential Factors for Destination Selection

Travel costs are the most influential factor

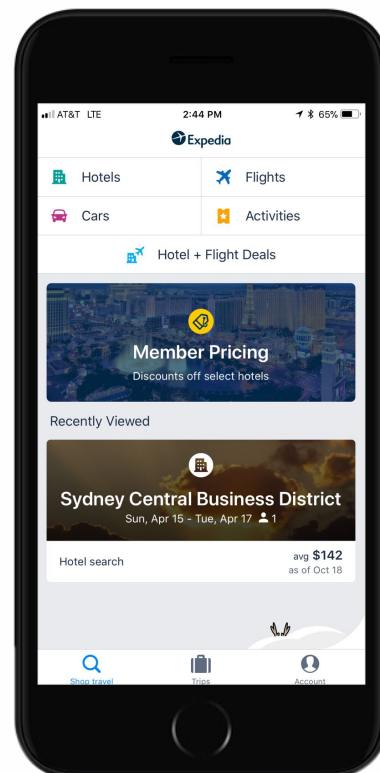
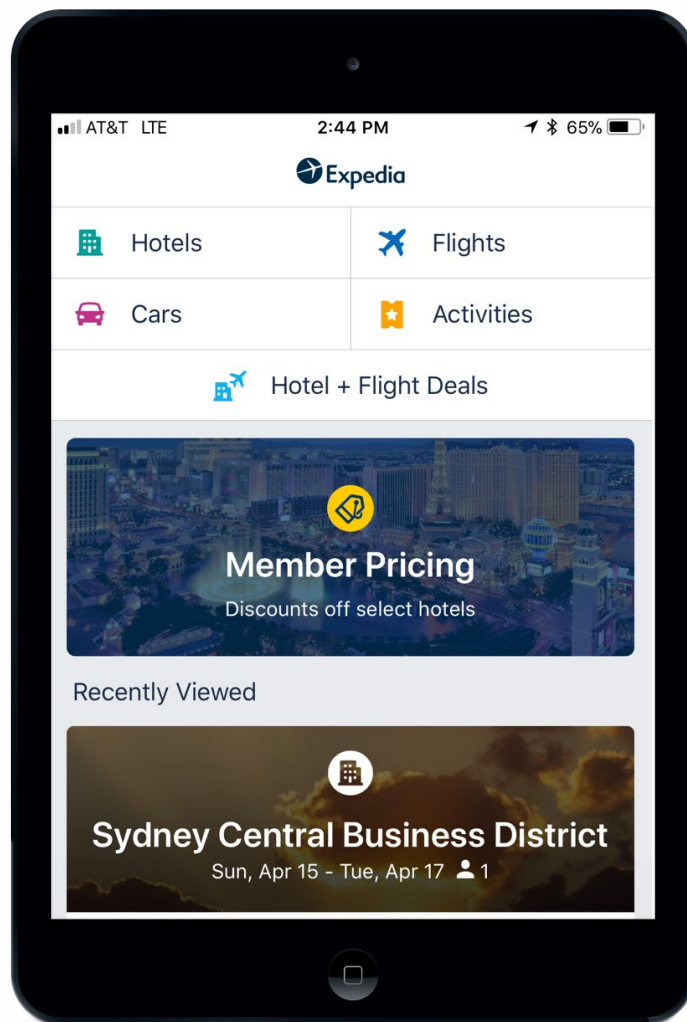


7 out of 10

OTA visitors engage with Expedia
Group US Sites

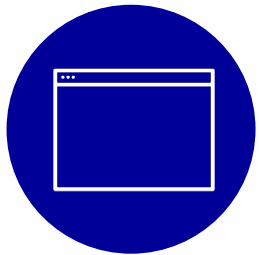
1 out of 4

OTA visitors engage with Expedia
Group worldwide sites



EXPEDIA GROUP™ MEDIA SOLUTIONS GLOBAL BRAND NETWORK

With a global audience of qualified
travel consumers



200

Sites



75

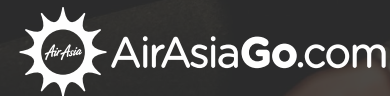
Countries



35

Languages

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Florida & Lee County Insights



Lee County growth consistent on all verticals



469.7K

Air Tickets

(+3.3% YoY)



475.6K

**Room
Nights**

(+4.3% YoY)



870.6K

Passengers

(+5.3% YoY)



2.4 Days

Avg. Length of Stay



13.0%

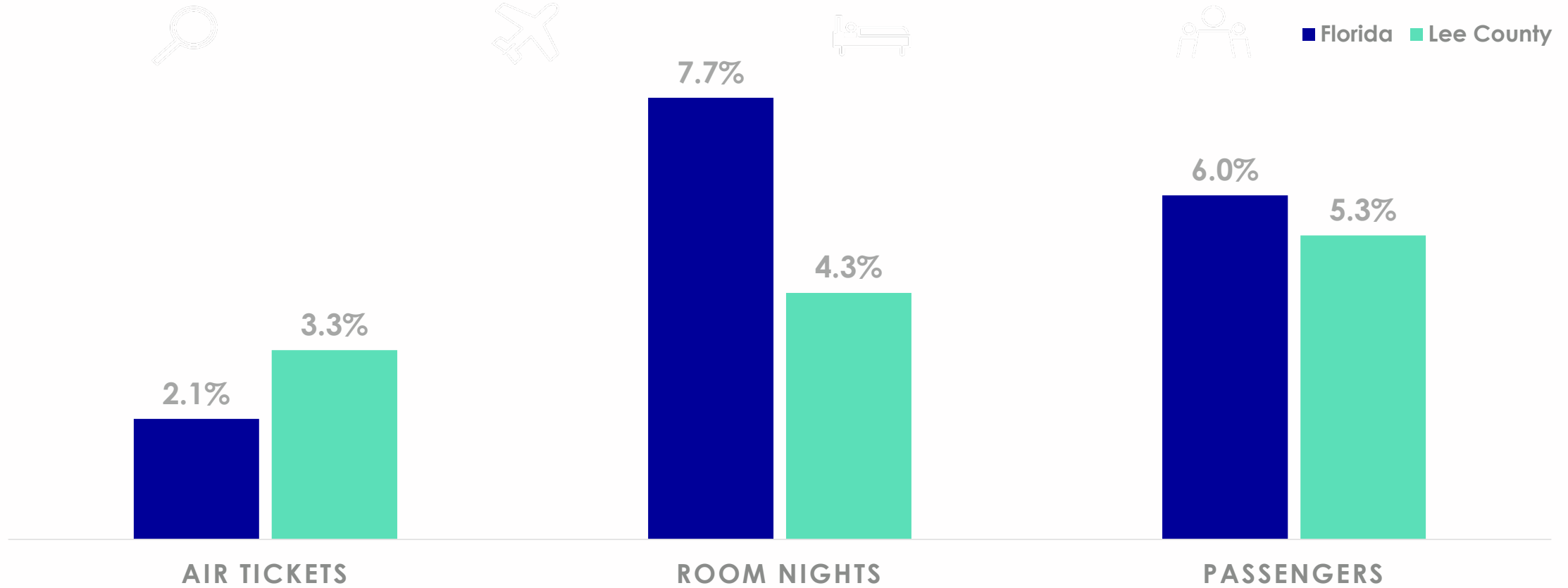
**Package
Bookings**

Lee County and Florida have consistent growth L12 Months YoY

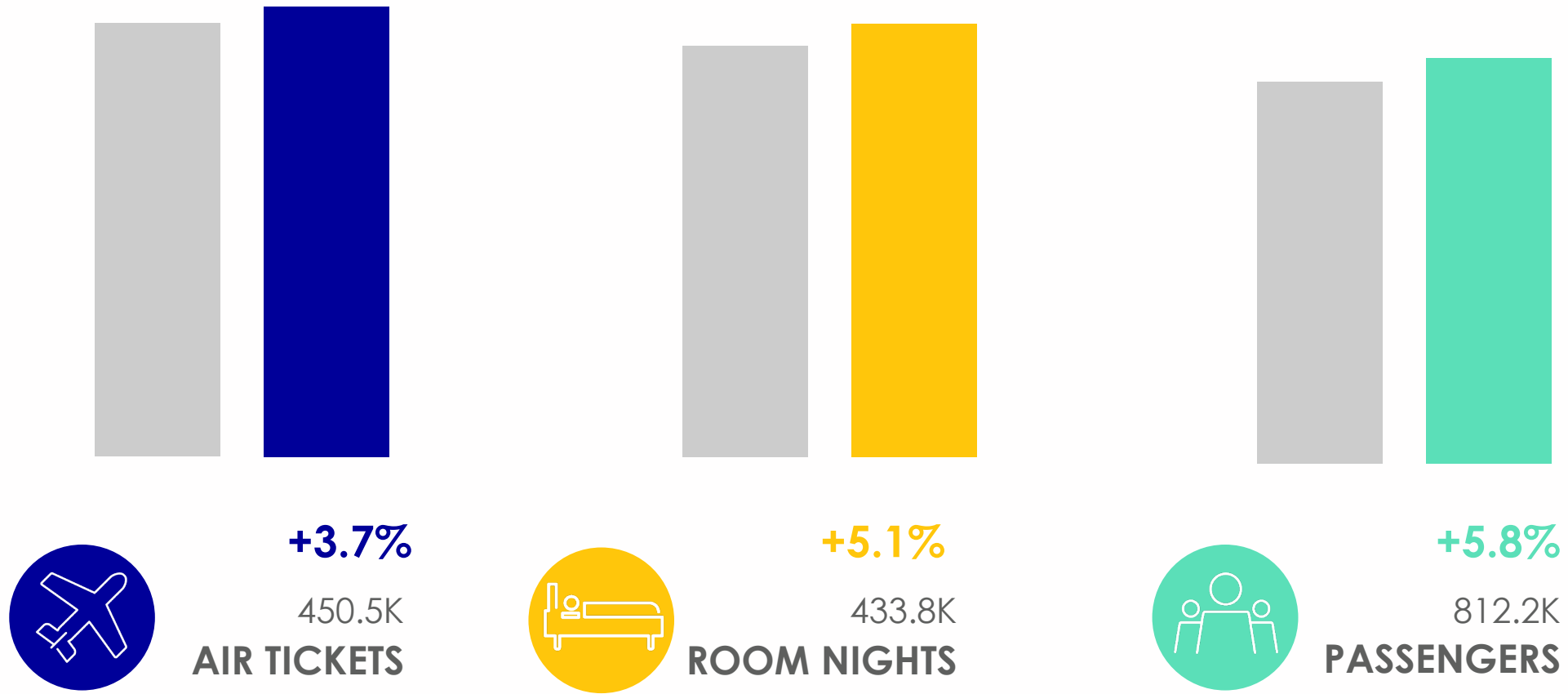


KEY INSIGHTS:

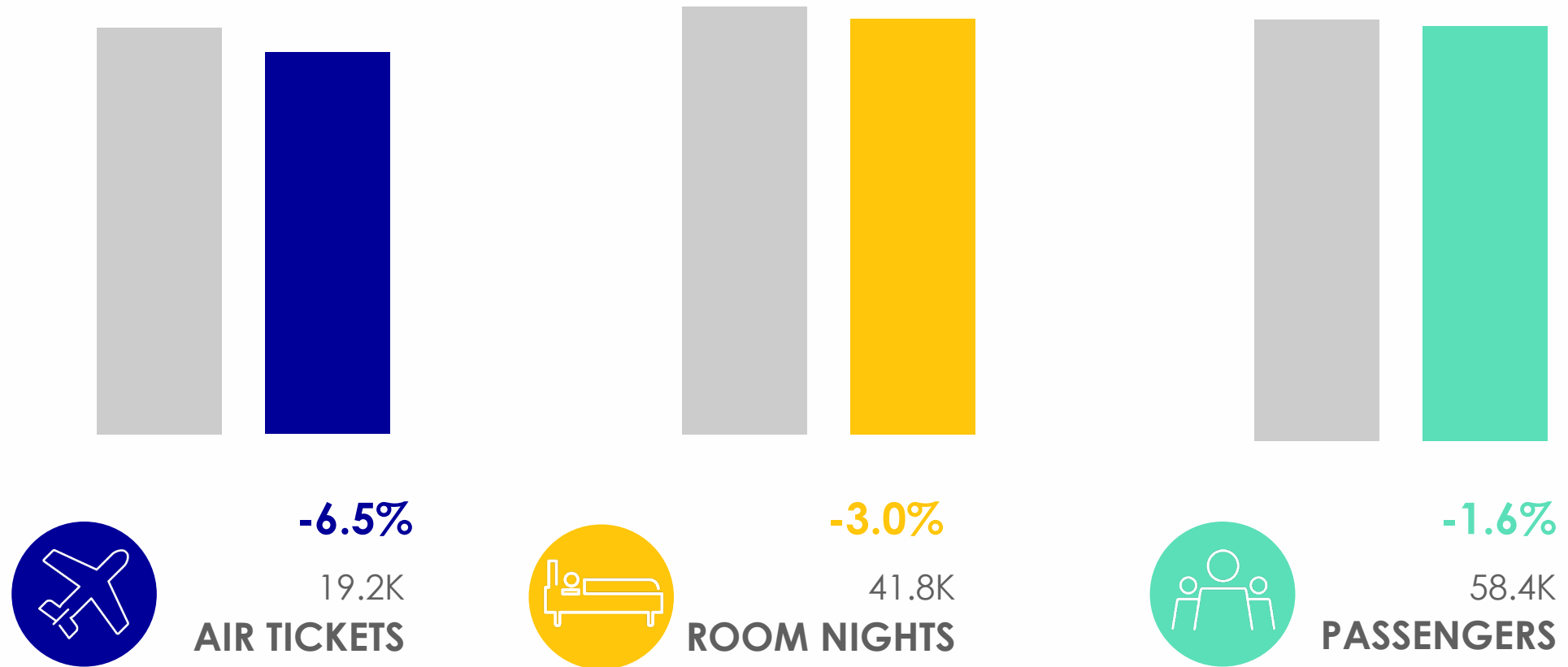
Lee County and Florida overall seeing strong growth YoY in the last 12 months. Lee County is out performing Florida for Air Tickets, and is not far behind for Room Nights and Passengers growth compared to Florida.



Lee County domestic production continues to grow



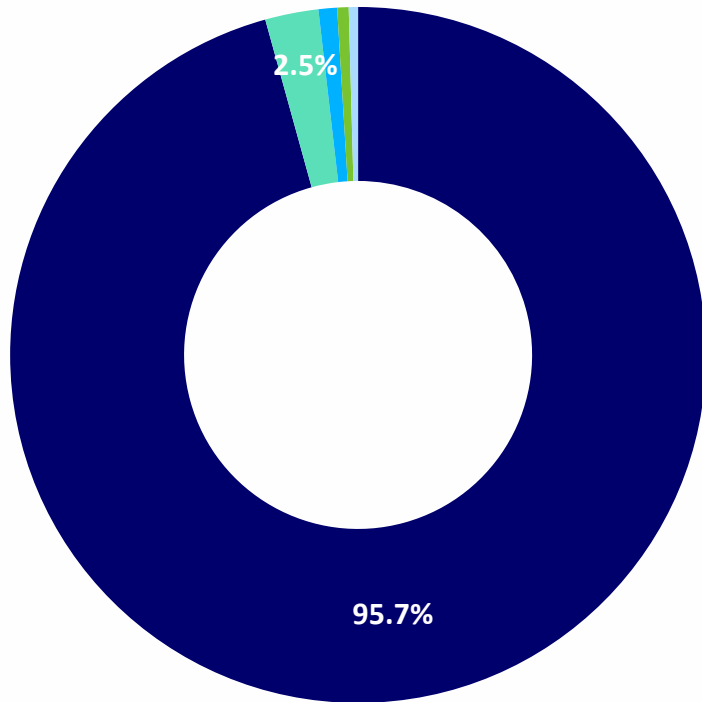
Lee County international production declining



Lee County domestic passengers grew YoY while top 4 international POS declined



842.5K Passenger bookings made to Lee County from
Top 5 feeder markets (96.8% of Total PAX)
 Passenger Breakdown per Market Dec '18 – Nov '19



■ United States ■ Canada ■ Germany ■ Sweden ■ United Kingdom



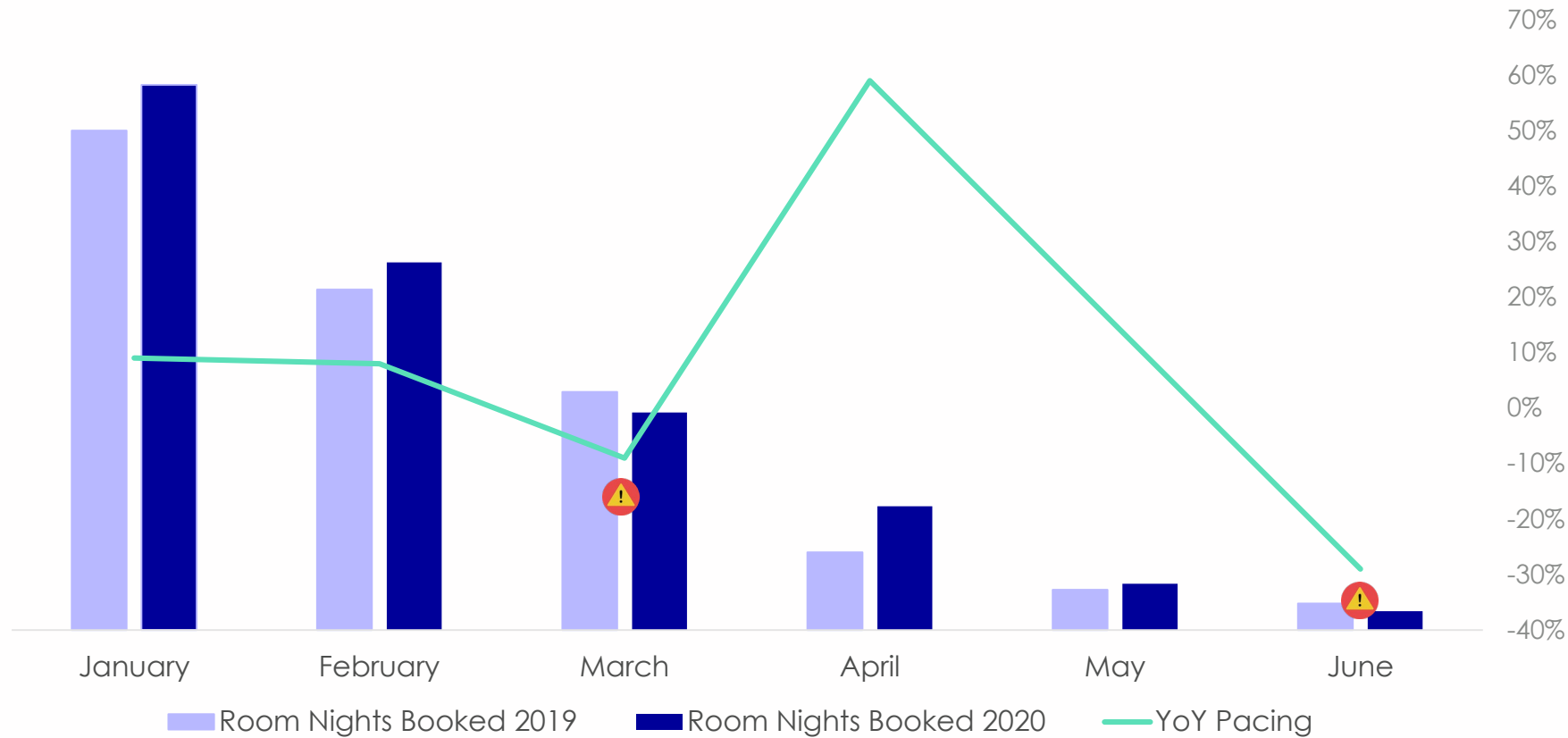
Source: 1st Party Expedia Group Booking Data Fort Myers Area, FL
 Date Range(s): Dec '18 – Nov '19 YoY
 Points of Sale (POS) used: US, CA, DE, SE, UK

Country	POS	PAX	Total	YoY
United States		405.4K	806.3K	+6.7%
		177.0K		
		111.1K		
		86.0K		
		19.1K		
Canada		17.6K	20.8K	-1.4%
		2.3K		
		0.9K		
Germany		4.8K	7.2K	-21.7%
		2.0K		
		0.3K		
Sweden		4.1K	4.5K	-19.2%
		0.2K		
		0.1K		
United Kingdom		2.0K	3.6K	-1.8%
		1.4K		
		0.2K		

Global Hotel Stays are up +7.9% in the next 6 months



SIX MONTH FORECAST



KEY INSIGHTS:

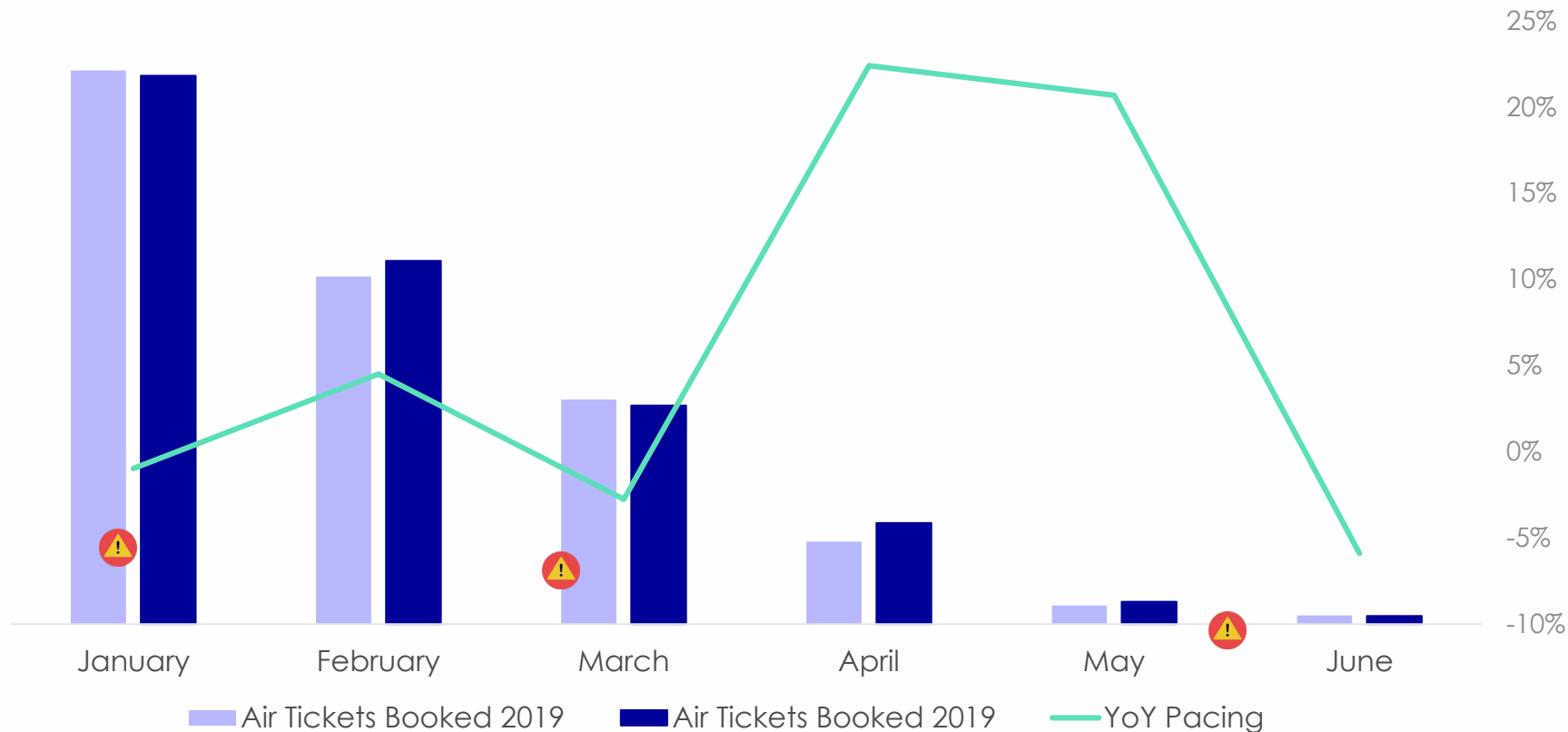
Global future room night stays in Lee County are on Global points of sale are up **+7.9%** from last year.

April has the strongest pace at **+59%** YoY.

Global Flights are up +2.1% in the next 6 months



SIX MONTH FORECAST



KEY INSIGHTS:

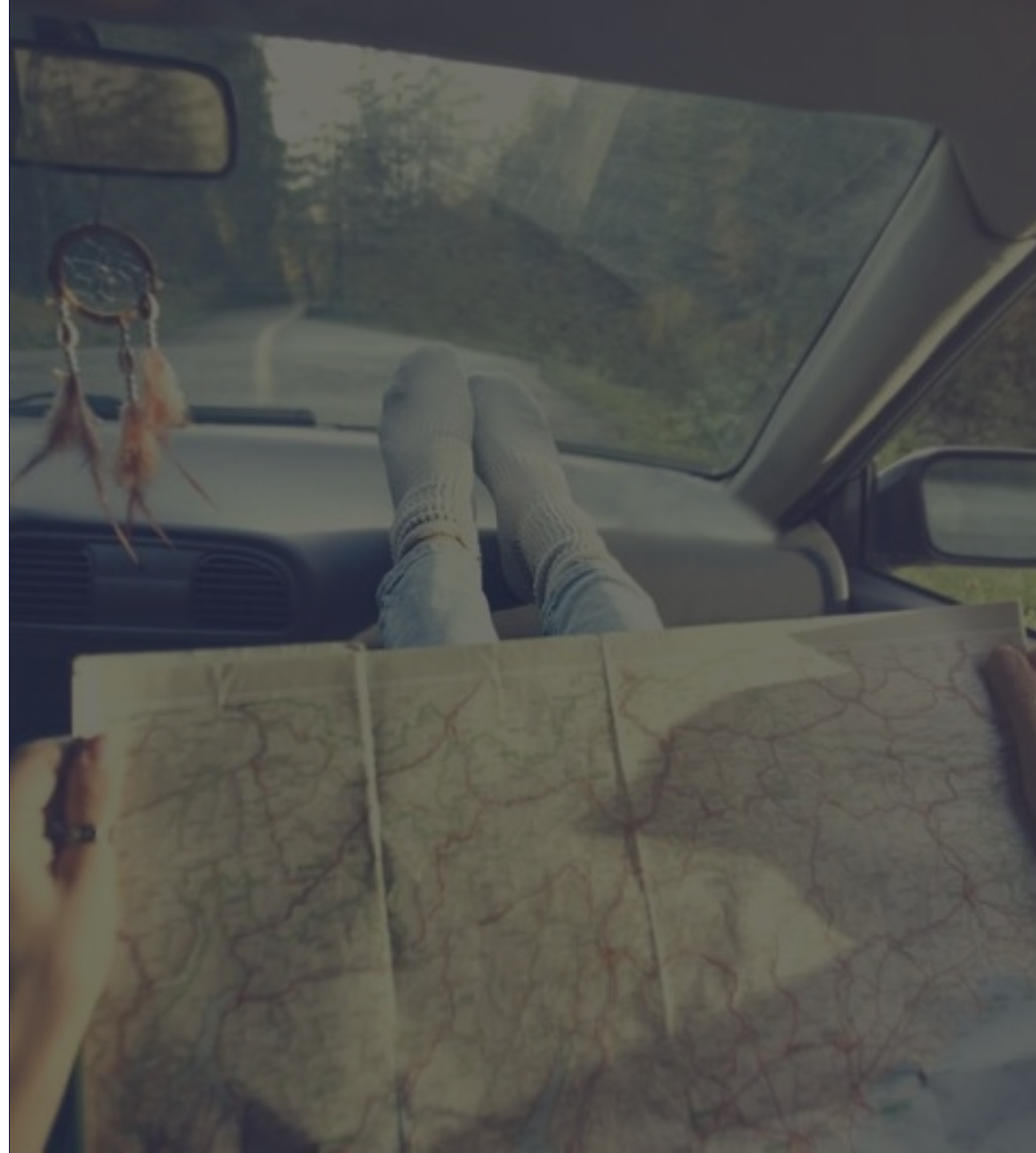
25%
20%
15%
10%
5%
0%
-5%
-10%

Future RSW flights on Global points of sale are up **+2.1%** from last year.

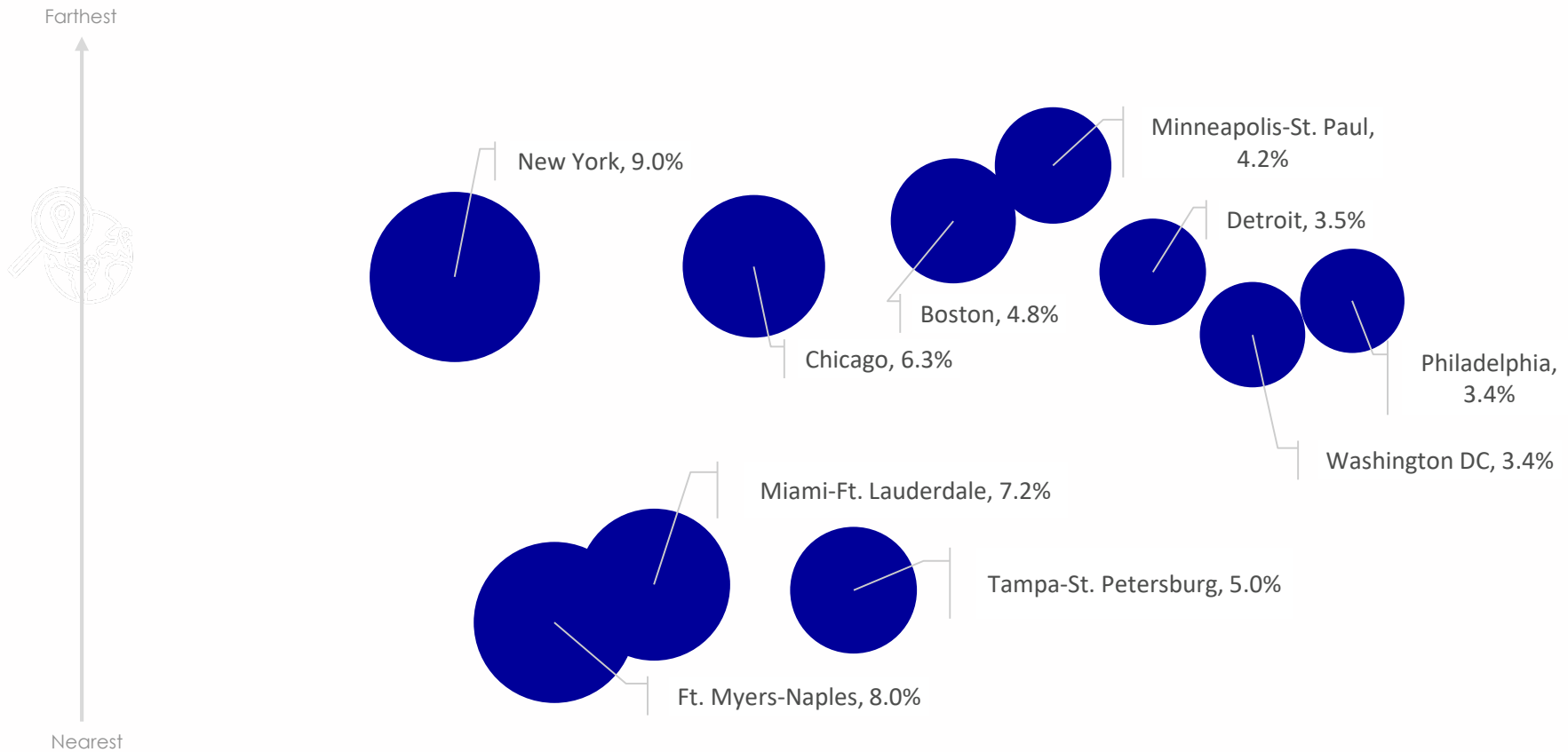
April has the strongest pace at **+22%** YoY.

Regional Destination Trends

UNITED STATES



Customers searching for Fort Myers Area are located in Florida or Eastern half of the country



KEY INSIGHTS:

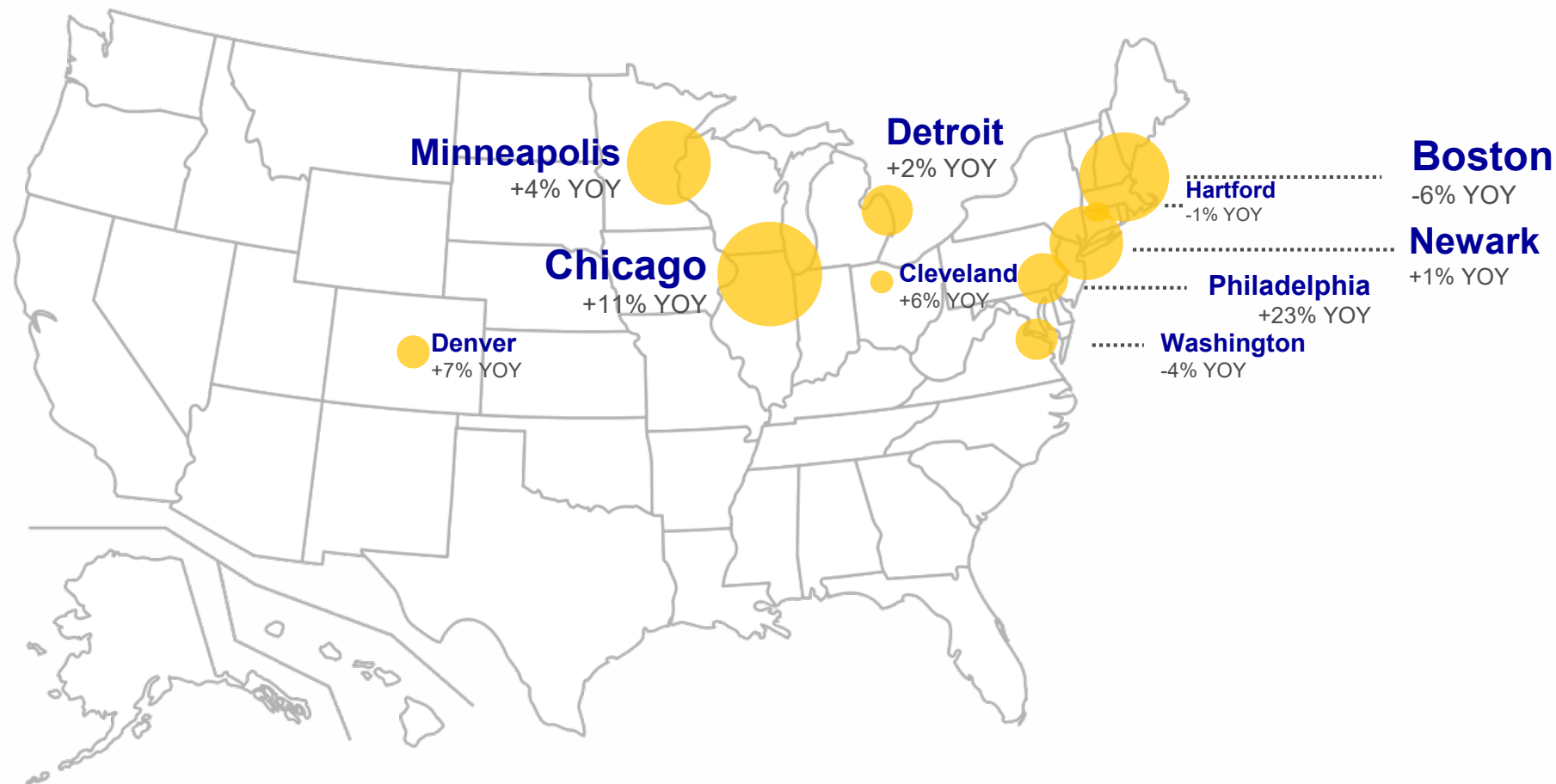
On US points of sale, Unique Visitor Searches to Lee County increased **+10.8%** compared to the previous 12-month period.

Top Domestic Fly Markets



KEY INSIGHTS:

- The top 10 markets account for **over half** of all domestic air tickets inbound to RSW.
- Domestic air tickets to Southwest Florida International Airport (RSW) are up **+3.7%** compared to the previous 12-month period.
- Ticket growth for the top 10 markets is pacing on par with the national average at **+4.3%** YoY.



Majority of origin flights to Florida and Lee County are located in the Eastern Half of the United States.



KEY INSIGHTS:

Top 10 origins are mainly located on the Eastern half of the country, Florida's exception is Los Angeles, while Lee County's is Minneapolis – which peaks at #3.

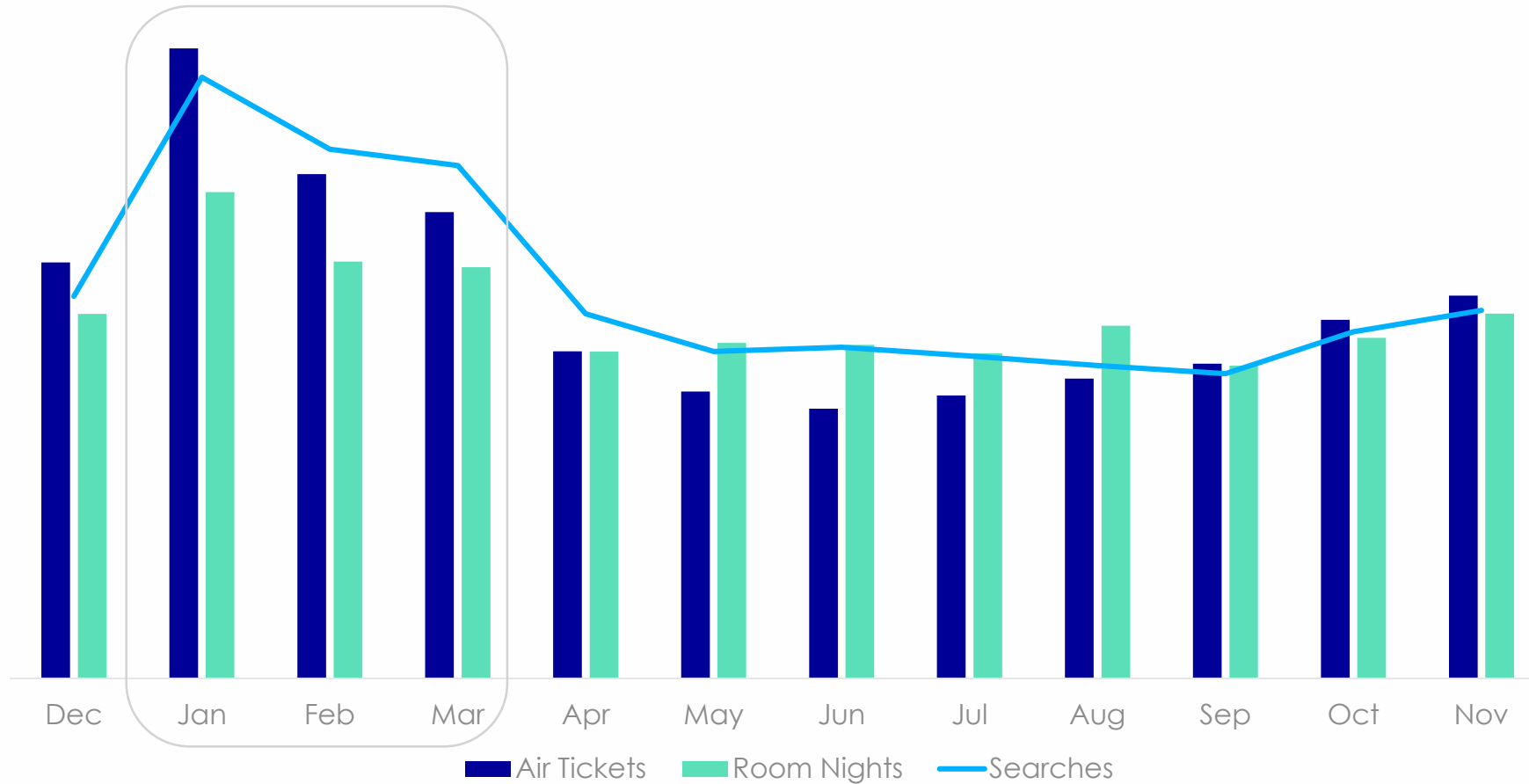


FLORIDA TOP 10 ORIGINS
NEW YORK
NEWARK
CHICAGO
BOSTON
PHILADELPHIA
WASHINGTON DC
DETROIT
LOS ANGELES
ATLANTA
TORONTO



LEE COUNTY TOP 10 ORIGINS
CHICAGO
BOSTON
MINNEAPOLIS
NEWARK
DETROIT
NEW YORK
PHILADELPHIA
WASHINGTON DC
CLEVELAND
TORONTO

Domestically, Q1 is the most popular time across all verticals to Search and Book Flights/Hotels.



KEY INSIGHTS:

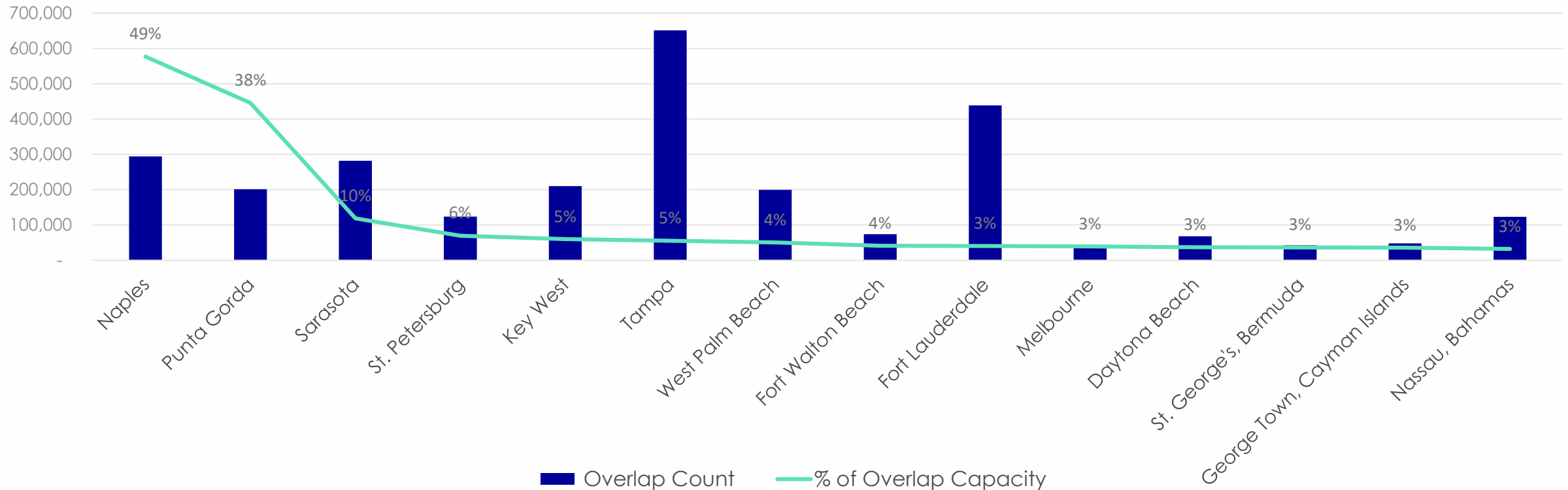
Q1 is the most popular period for both domestic Searches and Bookings to Lee County.

Both lines of business follow a similar path to purchase, with Hotel seasonality being slightly less polarized than Air.



Most competing destinations are located in Florida or the Caribbean. Almost 50% of people searching Lee County also Searched Naples.

People who searched for **Fort Meyers Area** also looked at:



Expedia Tools & Best Practices

Tips for Driving your Expedia Business

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A wooden boardwalk with railings leads down a grassy dune towards a sandy beach and the ocean. The sky is overcast with grey clouds. The text "Our first goal, our only goal" is overlaid in yellow at the top, and "YOUR SUCCESS" is overlaid in cyan in the middle.

Our first goal,
our only goal

YOUR SUCCESS

The insights you need



Research



Analytics



Market Reports

The Big Decision: How do travelers decide where to book?

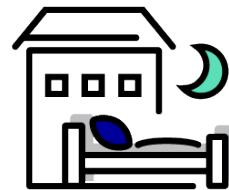
—
Results from our new
study reveal:



Price is by far the most influential
driver of hotel selection



Guest ratings have a strong
influence on consumer selection

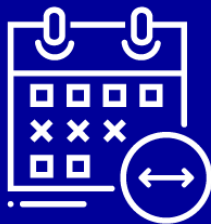


Consumers willing to pay more for
properties with higher guest
reviews

OTA travelers are premium travelers



Spend **17%**
MORE



Stay **8.4%**
LONGER

Partner Central Resources

Guest Ratings & Reviews to Drive Satisfaction

The influence of guest ratings

Consumers are willing to pay more for higher guest reviews

72%

chance that any consumer will value guest ratings more than brand

24%

Higher ADR for a 3.9 guest rating versus a 3.4 guest rating

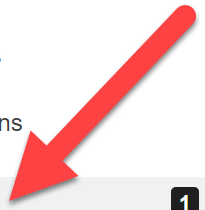
35%

Higher ADR for a 4.4 guest rating versus a 3.9 guest rating



Search Partner Central...

- Home
- Rooms and rates
- Marketing
- Reservations
- Guest relations
- Messages** 1
- In-house feedback 1
- Post-stay reviews 1
- Awards and downloads
- Accounting
- Property details
- Revenue management
- Analytics
- Internal tools



Messages

[Feedback](#)

- Messages**
- Templates and Schedules

[Settings](#)

The average response time of your property is around two days. For customer satisfaction, we encourage you to reply to your messages twice a day.

Search [Filters](#)

	8:51:31 AM
	12/28/2019
	12/21/2019
	12/28/2019
	12/27/2019
	12/27/2019
12/25/2019 - 12/26/2019	

Feb 12 - Feb 17 ★
Booked on Hotels.com

Special request

We expect to arrive early on Wednesday, about 1pm -- so we would love early check in if possible. If not, we would like to drop our bags and go exploring for a couple of hours or lay by the pool.

Dec 30, 8:51am

Search Partner Central...

- Home
- Rooms and rates
- Marketing
- Reservations
- Guest relations
 - Messages **1**
 - In-house feedback **1**
 - Post-stay reviews **1**
 - Awards and downloads
- Accounting
- Property details
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- Analytics
- Internal tools

Messages

Messages **Templates and Schedules**

[Feedback](#)

[Settings](#)

Create templates for the messages you send most, whether you want to provide directions, offer an upgrade, or just say hello.

Preset templates

Post-stay review requests

Your templates

Create new

Post-stay review requests

off

Write a custom message to guests thanking them for their stay and asking that they leave a review on Expedia Group sites. Increasing your number of reviews can give other travelers confidence and boost bookings.

We'll send this personalized message automatically after guests checkout, and include a link to our official review form. [Show tips](#)

Message

Dear [guest-name],

We hope you enjoyed your recent stay with us at [hotel-name].

Please take a moment to leave us a review. It lets us know how we did, and gives other travelers a better picture of what it's like to stay with us.

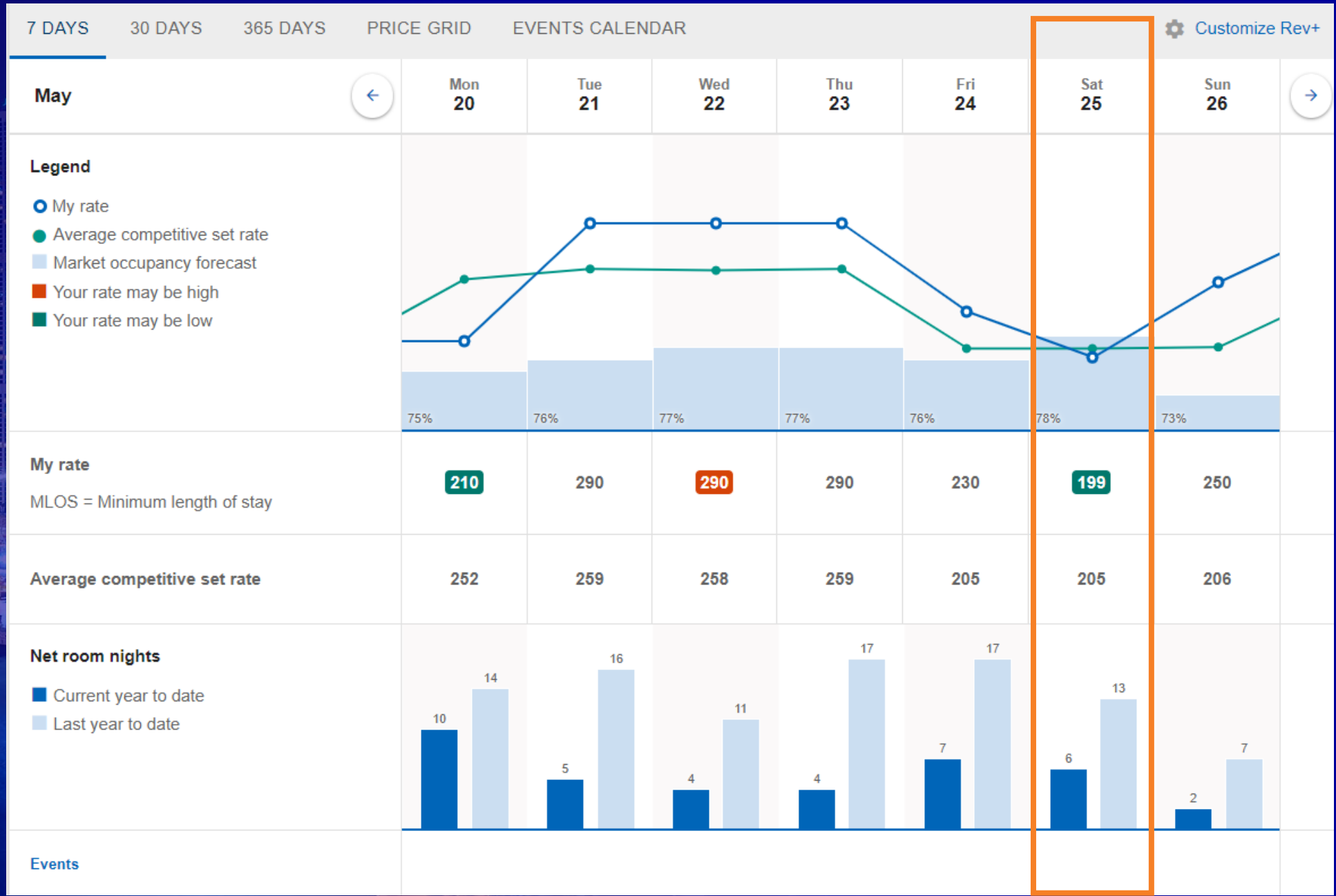
Thank you again for choosing [hotel-name], and we hope to see you again soon.

[Add custom details](#)

Revenue Management

Rev+ for Price Optimization and Market Insights

Using Real-Time Insights to deliver better supplier experiences



Rev+ revenue management

Smart, actionable data to set the right price

+20%

Faster revenue growth

\$26M

Generated in
incremental revenue

Marketing & Promotions

Package and International Opportunities

Multi-product Packages

Delight customers with the right product

1.2X Higher ADR

2X

Length of stay

1/2

Cancellation rate

2X

In advance bookings

Best Practices

Marketing & Promotions



Timing is Everything

Package and International travelers book further in advanced, so you should load promotions further in advanced.

Make sure you have your package and international promotions for Summer & Fall 2020 loaded now.



Stack Members

To add even more value and entice travelers, stack Members only discounts on top of your public promotions.

Use the auto-stacking feature for convenience and efficiency.



Be Competitive

Fenced channels are harder to shop, so this is your chance to provide your most competitive rates.

Beat or match your discounts on standalone rates to remain competitive.



THANK YOU

Linda Zimmerman | Sr. Business Development Manager

📞 +1 4072469949 ✉️ linzimmerman@expediagroup.com

Rachel Helms | Associate Market Manager

📞 +1 4077844312 ✉️ rhelms@expediagroup.com

