



Office of Travel and Tourism Industries

2008 Industry Sector Profile: Car Rental



Did You Know...?

- Overseas travelers who rent a car are four times more likely to use a personal computer to plan their trip now than they were in 1998 (48.4% vs. 12%).
- More likely to have traveled overseas in first class or business class than the average visitor from overseas.
- More likely to use a frequent flyer award or upgrade than the average overseas traveler.
- More likely than the average overseas visitor to stay from 11-35 nights and less likely to stay 1-10 nights. More likely to take between 2-10 trips to the U.S. and less likely to only take one trip to the U.S. per year.
- More likely to go to two or more destinations and less likely to go to only one destination in the U.S. when compared to the average overseas traveler.

Overseas Travelers Who Used a Rental Car (2008)

In 2008 7.6 million or 30% of the 25.3 million overseas visitors to the United States used a rental car as a mode of transportation. This was a 12% increase over 2007 car rentals by overseas visitors. The top five destination states for overseas travelers who rented a vehicle were Florida, California, New York, Nevada, and Massachusetts. The top five destination cities were Orlando, New York City, Los Angeles, San Francisco, and Miami.

The majority of overseas visitors who rented a car (57%) travel to the United States primarily for leisure which is more than the average overseas traveler. 24% stated that their main purpose of the trip was for business travel; visiting friends/

relatives accounted for 13% of overseas visitors who rented a car.

In 1998, 69% of overseas travelers who rented a car used a travel agent to book their airline tickets and the number who used the internet was almost non-existent (0.7%). In

2008, travel agent use had dropped to 42% while those using a personal computer had jumped to 27%.

Overseas travelers who rent a car continue to be majority male, but the number of female over-

seas visitors who rent a car has been increasing over the last ten years. Women now make up nearly one third of overseas travelers who rent a car (compared to 25% in 1997).



...continued.

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In addition, when compared to the average overseas traveler, those who rented a car are:

➤ More likely to participate in the following activities: amusement/theme parks, camping/hiking, casinos/gambling, environmental/eco excursions and golfing/tennis.

➤ 44% more likely to make their travel plans 181 or more days in advance.

➤ 34% more likely than the average overseas traveler to travel with a spouse, family or relatives, but less likely to travel alone or with a tour group; 68% more likely to travel with children.

➤ More likely to have their main purpose of trip be health treatment, but less likely to have their main purpose of trip be convention/conference, religion/pilgrimages, study/teaching and visit friends/relatives.

➤ More likely to arrive at the following ports of entry: Chicago, Boston, Los Angeles, Miami, and Orlando.

The average age for a male overseas traveler who rented a car was 44 while the average age for a female was 40.

➤ Males who rent cars are less likely to be under the age of 29 and most likely to be between the ages of 40 and 54. Females who rent cars are less likely to be under the age of 34 and over the age of 50; and most likely to be between the ages of 40 and 44.



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Overseas Visitors Using a Rental Car

[Thousands of Visitors]	2001	2002	2003	2004	2005	2006	2007	2008	Change 2008/2001
Total Overseas Visitors	6,161	5,984	5,588	6,198	6,547	6,284	6,785	7,602	1,441
Percentage Change (%)	-29%	-3%	-7%	11%	6%	-4%	8%	12%	23%

Information Sources Used for Trip Planning

Information Sources Used (multiple response: top 4 of 12)	2007	2008	% Point Change (1)
Personal Computer	44%	48%	4 pts.
Travel Agency	39%	35%	-4 pts.
Airlines Directly	20%	23%	3 pts.
Friends/Relatives	14%	14%	1 pt.

Main Purpose of Trip

Main Purpose of Trip (top 4 of 8)	2007	2008	% Point Change (1)
Leisure/Recreation/Holidays	52%	57%	5 pts.
Business/Professional	28%	24%	-4 pts.
Visit Friends/Relatives	13%	13%	0 pts.
Convention/Conference	5%	4%	-1 pt.

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All Purposes of Trip for Overseas Travelers Using a Rental Car

Purpose of Trip (multiple response--top 4 of 8)	2007	2008	% Point Change (1)
Leisure/Recreation/Holidays	65%	71%	6 pts.
Visit Friends/Relatives (VFR)	28%	29%	1 pt.
Business/Professional	31%	27%	-4 pts.
Convention/Conference	7%	6%	-2 pts.
NET PURPOSES OF TRIP:			
Leisure & VFR	76%	81%	5 pts.
Business & Convention	36%	31%	-5 pts.

Transportation Used in the United States

Transportation Types Used in United States (multiple response--top 5 of 8)	2007	2008	% Point Change (1)
Rented Auto	100%	100%	0 pts.
Airlines in U.S.	27%	28%	1 pt.
Taxi/Cab/Limousine	26%	27%	2 pts.
City Subway/Tram/Bus	15%	19%	3 pts.
Company or Private Auto	8%	8%	1 pt.

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Activity Participation of Overseas Travelers Using a Rental Car

Activity Participation While in the U.S. (multiple response--top 10 of 25)	2007	2008	% Point Change (1)
Shopping	90%	88%	-2 pts.
Dining in Restaurants	86%	88%	1 pt.
Sightseeing in Cities	39%	40%	1 pt.
Amusement/Theme Parks	35%	38%	3 pts.
Visit Historical Places	34%	36%	2 pts.
Visit Small Towns	31%	34%	3 pts.
Water Sports/Sunbathing	24%	29%	5 pts.
Touring Countryside	26%	28%	2 pts.
Visit National Parks	24%	27%	3 pts.
Cultural Heritage Sites	20%	24%	4 pts.

Select Traveler Characteristics

Traveler Characteristics	2007	2008	Change (1)
Advance Trip Decision Time (mean days)	92	103	11 days
Advance Trip Decision Time (median days)	60	60	0 days
Prepaid Package	17%	14%	-3 pts.
First International Trip to the U.S.	16%	18%	2 pts.
Length of Stay in U.S. (mean nights)	15.2	16.3	1 night
Length of Stay in U.S. (median nights)	10.0	12.0	2 nights
Number of States Visited (% 1 state)	62%	58%	-4 pts.
Average Number of States Visited	1.7	1.8	0 states
Hotel/Motel (% 1+ nights)	88%	86%	-2 pts.
Average # of Nights in Hotel/Motel	9.2	10.0	1 night
Travel Party Size (mean # of persons)	1.8	1.8	0.0
Gender: % Male (among adults)	67%	67%	0 pts.
Household Income (mean average)	\$104,700	\$110,600	\$5,900
Household Income (median average)	\$95,900	\$101,400	\$5,500
Average Age: Female	40	40	0 years
Average Age: Male	43	44	0 years

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U.S. Destinations Visited of Overseas Travelers Who Rent Cars

Visitation to U.S. Destinations/Regions (2)	Market Share 2007	Volume 2007 (000)	Market Share 2008	Volume 2008 (000)
REGIONS				
South Atlantic	41.2%	2,795	42.8%	3,254
Pacific	29.7%	2,015	30.6%	2,326
Middle Atlantic	21.8%	1,479	25.0%	1,901
Mountain	15.4%	1,045	17.9%	1,361
East North Central	9.1%	617	8.8%	669
New England	7.4%	502	7.3%	555
West South Central	5.4%	366	5.3%	403
STATES				
Florida	32.1%	2,178	33.3%	2,531
California	27.9%	1,893	28.8%	2,189
New York	18.4%	1,248	21.0%	1,596
Nevada	10.9%	740	13.0%	988
Massachusetts	5.8%	394	5.9%	449
CITIES				
Orlando	18.1%	1,228	20.0%	1,520
New York City	17.5%	1,187	19.9%	1,513
Los Angeles	14.6%	991	15.9%	1,209
San Francisco	12.8%	868	15.4%	1,171
Miami	14.0%	950	14.2%	1,079
Las Vegas	10.7%	726	12.5%	950
Washington, DC	4.9%	332	5.9%	449
Boston	5.3%	360	5.3%	403

(1) Percentage-point and percentage changes are based on non-rounded data.

(2) Only census region, state, and city destinations having a sample size of 400 or more are displayed. Due to quarterly data weighting by country and port of entry, some unreported destinations may have a higher proportion of total than those reported.

For a list of the states that comprise each census region, please visit: http://tinet.ita.doc.gov/outreachpages/census_regions.html.

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries; Bureau of Economic Analysis.

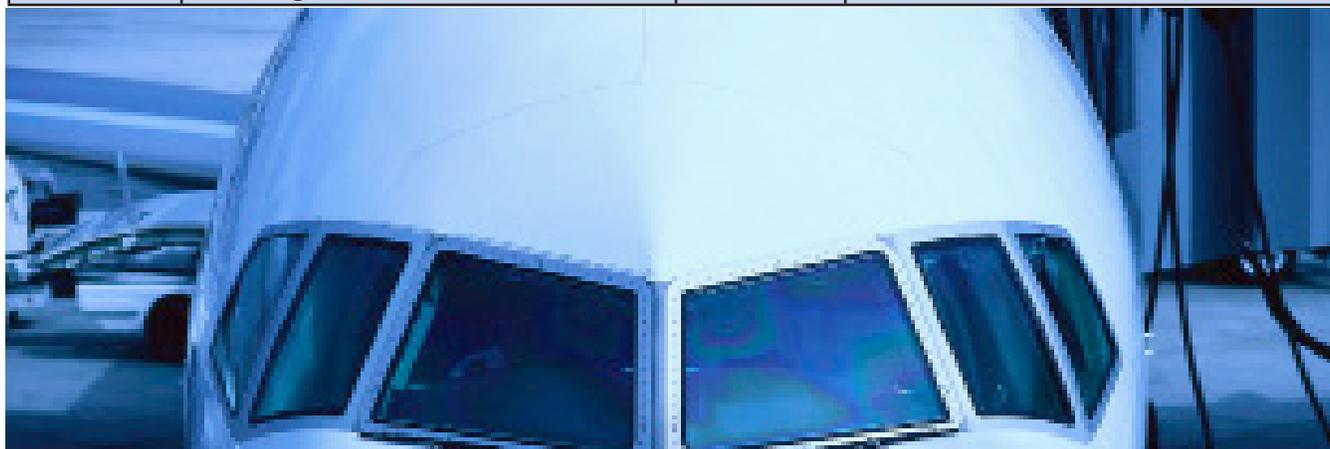
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Survey of International Air Travelers

The Survey of International Air Travelers (or “In-Flight” survey) provides a level of detail and insight into the traveler characteristics and travel patterns of international visitors to and from the United States not found elsewhere. Responses are weighted with data from the Department of Homeland Security and the following thirty-five tables are then populated. This report, which was constructed using just a fraction of the data available, summarizes what we know about the overseas traveler who visits the United States.

Survey of International Air Travelers: Table Number and Description

Table 1	Country of Residence	Table 19	Number of States Visited
Table 2	Advance Trip Decision	Table 20	Number of Destinations Listed
Table 3	Advance Airline Reservation	Table 21	Transportation in U.S.
Table 4	Means of Booking Air Trip	Table 22	Port of Entry
Table 5	Information Sources	Table 23	Main Destination
Table 6	Use of Package	Table 24	U.S. Destinations Visited
Table 7	Use of Prepaid Lodging	Table 25	Leisure Activities
Table 8	Advance Package Booking	Table 26	Total Trip Expenditures
Table 9	Pre-Booked Lodging	Table 27	Itemized Trip Expenditures
Table 10	Travel Companions	Table 28	Trip Expenses Payment Method
Table 11	Travel Party Size	Table 29	Factors in Airline Choice
Table 12	Main Purpose of Trip	Table 30	Main Factor in Airline Choice
Table 13	Purpose of Trip	Table 31	Type of Airline Ticket
Table 14	Type of Accommodation	Table 32	Seating Area
Table 15	Nights in the U.S.	Table 33	Gender & Age of Traveler
Table 16	First Int'l U.S. Trip	Table 34	Occupation
Table 17	U.S. Trips Last 12 Months	Table 35	Annual Household Income
Table 18	U.S. Trips Last 5 Years		



Custom Reports Available for Car Rentals

The Office of Travel and Tourism Industries (OTTI) survey data on overseas travelers to the United States can be segmented to focus on travelers who rented cars. Although OTTI surveyed over 37,000 overseas and Mexican air travelers to the country in 2008, there may be limitations due to sample size.

Possible Subsets Available:

- 1) All overseas travelers who used a rental car – (the big picture).
- 2) Countries of origin renting cars (United Kingdom, Japan, Germany, etc.).
- 3) Visitors who rented a car while on a business trip, leisure trip, or some combination thereof.
- 4) Visitors to a specific region, state or city who used a rental car.
- 5) Visitors who used a specific brand (Avis, Budget, Enterprise, etc).⁽¹⁾
- 6) Any of the other survey table responses.

Custom reports start at \$4,630 for a 12 column (you choose the 12 columns) and 35 tables on travelers who rented cars. For more info, go to: <http://tinet.ita.doc.gov/research/programs/ifs/customized.html>

(1) The client's brand data would be compared to its competitive aggregates. Brand data are confidential. All custom reports are developed by OTTI's contractor and sample sizes are checked before OTTI recommends purchasing a report.

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