



Office of Travel and Tourism Industries

# 2012 Sector Profile: Rental Car



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## Overseas Visitors Using Rental Cars

| [thousands of visitors]          | 2005  | 2006  | 2007  | 2008  | 2009  | 2010  | 2011  | 2012  | Change<br>2012/2005 |
|----------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|---------------------|
| Overseas Visitors <sup>(1)</sup> | 6,547 | 6,284 | 6,785 | 7,602 | 6,913 | 7,962 | 8,198 | 9,643 | 3,096               |
| % Change                         | 6     | -4    | 8     | 12    | -9    | 15    | 3     | 19    | 47%                 |
| Share of Overseas Visitors       | 30.2  | 29.0  | 28.4  | 30.0  | 29.1  | 30.2  | 29.4  | 32.4  |                     |
| Point Change in Share            | -0.3  | -1.2  | -0.6  | 1.6   | -0.9  | 1.1   | -0.8  | 3.0   | 2.2                 |

## Country of Origin of Visitors Using Rental Cars

| Visitor Origin                | Market Share<br>2011<br>(Percent) | Volume<br>2011<br>(000) | Market Share<br>2012<br>(Percent) | Volume<br>2012<br>(000) |
|-------------------------------|-----------------------------------|-------------------------|-----------------------------------|-------------------------|
| <b>WORLD REGIONS</b>          |                                   |                         |                                   |                         |
| Europe                        | 50.6                              | 4,148                   | 47.9                              | 4,619                   |
| South America                 | 17.5                              | 1,435                   | 21.8                              | 2,102                   |
| Asia                          | 22.3                              | 1,828                   | 20.4                              | 1,967                   |
| <b>COUNTRIES OF RESIDENCE</b> |                                   |                         |                                   |                         |
| United Kingdom                | 16.3                              | 1,336                   | 15.9                              | 1,533                   |
| Brazil                        | **                                | **                      | 11.0                              | 1,061                   |
| Germany                       | 10.3                              | 844                     | 9.8                               | 945                     |
| Japan                         | 9.9                               | 812                     | 8.9                               | 858                     |
| France                        | **                                | **                      | 5.5                               | 530                     |
| Korea, South                  | **                                | **                      | 4.3                               | 415                     |
| Argentina                     | **                                | **                      | 4.1                               | 395                     |
| Australia                     | **                                | **                      | 4.0                               | 386                     |
| P. R. of China                | **                                | **                      | 3.3                               | 318                     |

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## Information Sources Used to Plan Trip by Those Using Rental Cars

|      | Information Sources Used              | 2011<br>(Percent) | 2012<br>(Percent) | Point<br>Change (2) |
|------|---------------------------------------|-------------------|-------------------|---------------------|
|      | Airlines (Directly)                   | 24                | 47                | 22.5                |
|      | Corporate Travel Dept.                | 7                 | 13                | 6.0                 |
|      | Travel Guide(s)                       | 9                 | 16                | 7.0                 |
| 2012 | Personal Recommendation (Friends/Rel) |                   | 29                |                     |
| 2011 | Friends/Relatives                     | 16                |                   |                     |
| 2012 | National/State/City Travel Office     |                   | 12                |                     |
| 2011 | Nat'l Govt. Tourist Ofc.              | 2                 |                   |                     |
| 2011 | State/City Travel Ofc.                | 4                 |                   |                     |
| 2012 | Tour Operator/Travel Club             |                   | 8                 |                     |
| 2011 | Tour Company                          | 5                 |                   |                     |
| 2012 | Online Travel Agency (OTA)            |                   | 33                |                     |
| 2012 | Travel Agency Office                  |                   | 23                |                     |
| 2011 | Travel Agency                         | 34                |                   |                     |
| 2012 | Other                                 |                   | 5                 |                     |
| 2011 | TV/Radio                              | 1                 |                   |                     |
| 2011 | Personal Computer                     | 51                |                   |                     |
| 2011 | In-flight Info. Systems               | 2                 |                   |                     |
| 2011 | Newspapers/Magazines                  | 3                 |                   |                     |

## Main Purpose of Trip

|      | Main Purpose of Trip              | 2011<br>(Percent) | 2012<br>(Percent) | Point<br>Change (2) |
|------|-----------------------------------|-------------------|-------------------|---------------------|
|      | Convention/Conference/Trade Show  | 3                 | 6                 | 2.7                 |
|      | Visit Friends/Relatives           | 13                | 10                | -2.9                |
|      | Health Treatment                  | 0.3               | 0.4               | 0.1                 |
|      | Religion/Pilgrimages              | 0.1               | 0.1               | 0.0                 |
| 2012 | Business                          |                   | 14                |                     |
| 2011 | Business/Professional             | 19                |                   |                     |
| 2012 | Vacation/Holiday                  |                   | 67                |                     |
| 2011 | Leisure/Rec./Holidays/Sightseeing | 62                |                   |                     |
| 2012 | Education                         |                   | 3                 |                     |
| 2011 | Study/Teaching                    | 2                 |                   |                     |
|      | Other                             | 1                 | 1                 | 0.2                 |

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## All Purposes of Trip

|      | Purpose of Trip                   | 2011<br>(Percent) | 2012<br>(Percent) | Point<br>Change (2) |
|------|-----------------------------------|-------------------|-------------------|---------------------|
|      | Convention/Conference/Trade Show  | 6                 | 8                 | 2.3                 |
|      | Visit Friends/Relatives           | 26                | 24                | -2.2                |
|      | Health Treatment                  | 1                 | 1                 | -0.1                |
|      | Religion/Pilgrimages              | 0.4               | 1                 | 0.1                 |
| 2012 | Business                          |                   | 17                |                     |
| 2011 | Business/Professional             | 22                |                   |                     |
| 2012 | Vacation/Holiday                  |                   | 76                |                     |
| 2011 | Leisure/Rec./Holidays/Sightseeing | 75                |                   |                     |
| 2012 | Education                         |                   | 5                 |                     |
| 2011 | Study/Teaching                    | 4                 |                   |                     |
|      | Other                             | 1                 | 1                 | 0.2                 |
|      |                                   |                   |                   |                     |
|      | NET PURPOSES OF TRIP:             |                   |                   |                     |
|      | Leisure & VFR                     | 83                | 83                | -0.1                |
|      | Business & Convention             | 26                | 23                | -2.5                |

## Transportation Used in United States by Those Using Rental Cars

|      | Transportation Types Used in United States | 2011<br>(Percent) | 2012<br>(Percent) | Point<br>Change (2) |
|------|--|-------------------|-------------------|---------------------|
|      | Airlines in U.S.                           | 30                | 36                | 5.9                 |
|      | Bus between Cities                         | 5                 | 8                 | 3.1                 |
|      | City Subway/Tram/Bus                       | 19                | 22                | 2.8                 |
|      | Company or Private Auto                    | 8                 | 22                | 14.1                |
|      | Railroad between Cities                    | 6                 | 4                 | -2.1                |
|      | Motor Home/Camper                          | 1                 | 1                 | -0.1                |
|      | Rented Auto                                | 100               | 100               | 0.0                 |
|      | Taxi/Cab/Limousine                         | 27                | 23                | -4.1                |
| 2012 | Cruise Ship/River Boat 1+ Nights           |                   | 4                 |                     |
| 2012 | Ferry/River Taxi/Short Scenic Cruise       |                   | 9                 |                     |
| 2012 | Rented Bicycle/Motorcycle/Moped            |                   | 3                 |                     |

# 2012 Industry Sector Profile: Rental Car

## Activity Participation While in the United States

|      | Activity Participation While in the U.S. | 2011<br>(Percent) | 2012<br>(Percent) | Point<br>Change (2) |
|------|--|-------------------|-------------------|---------------------|
|      | Amusement/Theme Parks                    | 41                | 40                | -0.8                |
|      | Art Gallery/Museum                       | 19                | 26                | 6.7                 |
|      | Sporting Event                           | 7                 | 12                | 5.1                 |
|      | Camping/Hiking                           | 6                 | 6                 | 0.5                 |
|      | Casino/Gambling                          | 15                | 14                | -1.0                |
|      | Concert/Play/Musical                     | 14                | 16                | 2.5                 |
|      | Environ./Eco. Excursions                 | 5                 | 4                 | -0.6                |
|      | Golfing/Tennis                           | 6                 | 6                 | -0.2                |
|      | Guided Tours                             | 16                | 23                | 6.9                 |
|      | Hunting/Fishing                          | 2                 | 2                 | 0.2                 |
|      | Nightclubs/Dancing                       | 11                | 15                | 4.2                 |
|      | Shopping                                 | 90                | 91                | 0.8                 |
|      | Visit American Indian Communities        | 5                 | 7                 | 1.5                 |
| 2012 | Cultural / Ethnic Heritage Sites         |                   | 17                |                     |
| 2011 | Cultural Heritage Sites                  | 26                |                   |                     |
| 2011 | Ethnic Heritage Sites                    | 4                 |                   |                     |
| 2012 | Experience Fine Dining                   |                   | 41                |                     |
| 2011 | Dining in Restaurants                    | 87                |                   |                     |
| 2012 | Sightseeing                              |                   | 77                |                     |
| 2011 | Sightseeing in Cities                    | 44                |                   |                     |
| 2012 | Snow Sports                              |                   | 2                 |                     |
| 2011 | Snow Skiing                              | 2                 |                   |                     |
| 2012 | Small Towns/Countryside                  |                   | 40                |                     |
| 2011 | Visit Small Towns/Villages               | 36                |                   |                     |
| 2011 | Touring Countryside                      | 29                |                   |                     |
| 2012 | National Parks/Monuments                 |                   | 41                |                     |
| 2011 | Visit National Parks                     | 30                |                   |                     |
| 2012 | Water Sports                             |                   | 13                |                     |
| 2011 | Water Sports/Sunbathing                  | 27                |                   |                     |
| 2012 | Visit Historical Locations               |                   | 31                |                     |
| 2011 | Visit Historical Places                  | 42                |                   |                     |
| 2012 | Other                                    |                   | 2                 |                     |
| 2011 | Cruises                                  | 7                 |                   |                     |
| 2011 | Ranch Vacations                          | 2                 |                   |                     |

# 2012 Industry Sector Profile: Rental Car

## U.S. Destinations Visited by Overseas Travelers Using Rental Cars

| Visitation to U.S. Destinations/Regions (3) | Market Share 2011 (Percent) | Volume 2011 (000) | Market Share 2012 (Percent) | Volume 2012 (000) |
|---|-----------------------------|-------------------|-----------------------------|-------------------|
| <b>REGIONS</b>                              |                             |                   |                             |                   |
| South Atlantic                              | 41.8                        | 3,584             | 45.8                        | 4,687             |
| Pacific                                     | 32.0                        | 2,744             | 28.8                        | 2,947             |
| Middle Atlantic                             | 25.5                        | 2,187             | 21.7                        | 2,221             |
| Mountain                                    | 19.7                        | 1,689             | 18.6                        | 1,904             |
| Pacific Islands                             | 9.5                         | 815               | 11.5                        | 1,177             |
| East North Central                          | 6.6                         | 566               | 7.3                         | 747               |
| West South Central                          | 6.3                         | 540               | 6.3                         | 645               |
| New England                                 | 7.1                         | 609               | 6.0                         | 614               |
| <b>STATES</b>                               |                             |                   |                             |                   |
| Florida                                     | 32.0                        | 2,744             | 38.3                        | 3,920             |
| California                                  | 30.3                        | 2,598             | 27.1                        | 2,773             |
| New York                                    | 22.6                        | 1,938             | 19.5                        | 1,996             |
| Nevada                                      | 15.0                        | 1,286             | 15.0                        | 1,535             |
| Hawaiian Islands                            | 7.9                         | 677               | 9.7                         | 993               |
| Arizona                                     | 6.2                         | 532               | 5.4                         | 553               |
| Massachusetts                               | 5.5                         | 472               | 5.2                         | 532               |
| Texas                                       | 4.7                         | 403               | 4.8                         | 491               |
| Illinois                                    | **                          | **                | 4.7                         | 481               |
| <b>CITIES</b>                               |                             |                   |                             |                   |
| Orlando                                     | 18.9                        | 1,621             | 22.1                        | 2,262             |
| Miami                                       | 15.7                        | 1,346             | 19.7                        | 2,016             |
| New York City                               | 21.8                        | 1,869             | 19.0                        | 1,944             |
| Los Angeles                                 | 18.5                        | 1,586             | 16.5                        | 1,689             |
| Las Vegas                                   | 14.5                        | 1,243             | 14.5                        | 1,484             |
| San Francisco                               | 15.4                        | 1,321             | 14.2                        | 1,453             |
| Oahu/Honolulu                               | 6.4                         | 549               | 7.5                         | 768               |
| Washington, DC                              | 6.5                         | 557               | 5.5                         | 563               |
| Boston                                      | 5.0                         | 429               | 4.9                         | 501               |
| Chicago                                     | **                          | **                | 4.5                         | 461               |
| San Diego                                   | **                          | **                | 4.5                         | 461               |

# 2012 Industry Sector Profile: Rental Car

## Select Traveler Characteristics of Those Using Rental Cars

| Traveler Characteristics                 | 2011      | 2012      | Change (2) |
|--|-----------|-----------|------------|
| Advance Trip Decision Time (mean days)   | 108       | 108       | 0.0        |
| Advance Trip Decision Time (median days) | 70        | 90        | 20.0       |
| Prepaid Package                          | 14        | 15        | 0.3        |
| First International Trip to the U.S.     | 23        | 17        | -5.2       |
| Length of Stay in U.S. (mean nights)     | 17.0      | 16.8      | -0.2       |
| Length of Stay in U.S. (median nights)   | 12        | 12        | 0.0        |
| Number of States Visited (% 1 state)     | 57        | 59        | 2.0        |
| Average Number of States Visited         | 1.8       | 1.7       | -0.1       |
| Hotel/Motel (% 1+ nights)                | 88        | 88        | -0.2       |
| Average # of Nights in Hotel/Motel       | 10.4      | 11.1      | 0.7        |
| Travel Party Size (mean # of persons)    | 1.8       | 1.9       | 0.1        |
| Gender: % Male (among adults)            | 63        | 63        | 0.3        |
| Household Income (mean average)          | \$100,200 | \$113,014 | \$12,814   |
| Household Income (median average)        | \$90,100  | \$85,999  | -\$4,101   |
| Average Age: Female                      | 40        | 39        | -0.4       |
| Average Age: Male                        | 43        | 42        | -1.2       |

(1) Overseas includes all countries except Canada & Mexico

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

(3) "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."

(\*\*) Estimate not shown due to sample size fewer than 400 for this year.

Note: Estimate not shown due to sample size fewer than 400 for this year. This profile shows only a portion of the 35 travel characteristics data in 2011 and the 37 items reported on international arrivals to the U.S. Additional information may be obtained for a fee. To learn more, please visit our website: <http://tinet.ita.doc.gov/research/programs/ifs/index.html>

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

Interested in data for your destination? OTTI sells custom reports. To learn more, go to:  
<http://www.tinet.ita.doc.gov/research/programs/ifs/customized.html>

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

Publication Date: August 2013

## Survey of International Air Travelers

The Survey of International Air Travelers 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 used rental cars while in 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 Rental Car   | Table 25 | Leisure Activities            |
| Table 8  | Advance Package Booking     | Table 26 | Total Trip Expenditures       |
| Table 9  | Pre-Booked Rental Car       | 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     |          |                               |



# Interested in obtaining data for your organization?

OTTI collects, analyzes and disseminates international travel and tourism statistics from the U.S. Travel and Tourism Statistical System and produces visitation data tables, including a business and pleasure arrivals rate of change analysis and detailed region, country and port analyses.

To learn more, you are encouraged to visit:

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- Summary of International Travel to the United States (I-94)
- U.S. International Air Traveler Statistics (I-92)
- Canadian Statistics
- Survey of International Air Travelers (SIAT)
- Forecast of International Arrivals to the United States
- U.S. Travel and Tourism Exports, Imports and the Balance of Trade
- U.S. Travel and Tourism Satellite Accounts
- Travel Trade Barometer

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