

U.S. Department of Commerce  
International Trade Administration



National Travel and Tourism Office

# 2014 Sector Profile: Rental Car



# 2014 Industry Sector Profile: Rental Car

## Overseas Visitors Using Rental Cars

[thousands of visitors]	2007	2008	2009	2010	2011	2012	2013	2014	Change 2014/2007
Overseas Visitors <sup>(1)</sup>	6,785	7,602	6,913	7,962	8,198	9,643	10,669	12,150	5,365
% Change	8	12	-9	15	3	18	11	14	79
Share of Overseas Visitors	28	30	31	30	29	32	33	35	
Point Change in Share	-1	2	-1	1	-1	3	1	2	7

## Country of Origin of Visitors Using Rental Cars

Visitor Origin	Market Share 2013 (Percent)	Volume 2013 (000)	Market Share 2014 (Percent)	Volume 2014 (000)
<b>Regions</b>				
Europe	43.6	4,652	41.7	5,067
South America	25.2	2,689	25.3	3,074
Asia	20.2	2,155	21.0	2,552
Oceania	4.7	501	4.7	571
<b>Countries</b>				
Brazil	12.0	1,280	12.1	1,470
United Kingdom	13.6	1,451	12.0	1,458
Germany	9.4	1,003	8.5	1,033
Japan	8.0	854	7.2	875
France	**	**	5.1	620
Australia	**	**	3.8	462
Argentina	4.1	437	3.6	437
Colombia	**	**	3.5	425

# 2014 Industry Sector Profile: Rental Car

## Main Purpose of Trip

Main Purpose of Trip	2013 (Percent)	2014 (Percent)	Point Change <sup>(2)</sup>
Vacation/Holiday	68	70	2.1
Business	13	12	-0.6
Visit Friends/Relatives	10	10	0.0
Convention/Conference/Trade Show	5	4	-1.0
Education	3	3	-0.2
Health Treatment	0.3	0.4	0.1
Religion/Pilgrimages	0.1	0.2	0.1
Other	1	1	-0.4

## All Purposes of Trip

Purpose of Trip (multiple responses)	2013 (Percent)	2014 (Percent)	Point Change <sup>(2)</sup>
Vacation/Holiday	77	78	1.3
Visit Friends/Relatives	23	24	0.6
Business	16	16	-0.6
Convention/Conference/Trade Show	8	7	-0.7
Education	5	4	-0.4
Health Treatment	1	1	0.3
Religion/Pilgrimages	1	1	0.0
Other	2	1	-0.7
<b>NET PURPOSES OF TRIP:</b>			
Leisure & VFR	83	85	2.2
Business & Convention	21	21	-0.8

# 2014 Industry Sector Profile: Rental Car

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

Information Sources Used (multiple responses)	2013 (Percent)	2014 (Percent)	Point Change (2)
Airlines	48	47	-1.2
Online Travel Agency	35	37	2.0
Personal Recommendation	29	29	-0.2
Travel Agency Office	21	21	-0.3
Travel Guides	16	16	-0.4
Corporate Travel Dept.	13	12	-0.9
National/State/City Travel Office	12	12	-0.3
Tour Operator/Travel Club	9	9	-0.4
Other	6	6	0.1

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

Transportation Types Used in United States (multiple responses)	2013 (Percent)	2014 (Percent)	Point Change (2)
Rented Auto	100	100	0.0
Air Travel between U.S. Cities	35	31	-3.8
Auto, Private or Company	22	21	-0.6
City Subway/Tram/Bus	21	19	-1.9
Taxicab/Limousine	22	19	-2.5
Bus between Cities	9	9	-0.7
Ferry/River Taxi/Srt Scenic Cruise	8	7	-1.2
Cruise Ship/River Boat 1+ Nights	4	4	0.2
Railroad between Cities	4	4	-0.6
Rented Bicycle/Motorcycle/Moped	4	3	-0.2
Motor Home/Camper	1	1	-0.3

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## Activity Participation While in the United States

Activity Participation While in the U.S. (multiple responses)	2013 (Percent)	2014 (Percent)	Point Change <sup>(2)</sup>
Shopping	92	91	-1.1
Sightseeing	77	77	0.2
Amusement/Theme Parks	41	42	1.2
Experience Fine Dining	42	42	-0.2
National Parks/Monuments	39	40	0.7
Small Towns/Countryside	38	37	-0.1
Historical Locations	31	30	-1.0
Art Gallery/Museum	25	25	-0.4
Guided Tours	22	22	-0.3
Cultural / Ethnic Heritage Sites	16	16	-0.2
Concert/Play/Musical	16	16	-0.2
Nightclubbing/Dancing	17	15	-1.2
Sporting Event	13	14	0.9
Casinos/Gamble	13	12	-1.6
Water Sports	11	11	-0.1
American Indian Communities	6	6	0.3
Camping/Hiking	6	6	0.5
Environ./Eco. Excursions	4	5	0.5
Golfing/Tennis	6	5	-1.1
Hunting/Fishing	1	2	0.7
Snow Sports	2	2	-0.5
Other	2	2	-0.3



# 2014 Industry Sector Profile: Rental Car

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

Visitation to U.S. Destinations/Regions (3)	Market Share 2013 (Percent)	Volume 2013 (000)	Market Share 2014 (Percent)	Volume 2014 (000)
<b>Regions</b>				
South Atlantic	48.3	5,153	49.3	5,990
Pacific	28.2	3,009	28.3	3,438
Middle Atlantic	20.3	2,166	18.9	2,296
Mountain	17.0	1,814	17.1	2,078
Pacific Islands	11.4	1,216	10.7	1,300
East North Central	5.7	608	5.8	705
West South Central	6.6	704	5.8	705
New England	5.6	597	5.3	644
<b>States</b>				
Florida	40.9	4,364	41.9	5,091
California	26.7	2,849	26.8	3,256
New York	17.8	1,899	16.5	2,005
Nevada	13.4	1,430	13.2	1,604
Hawaii	9.7	1,035	8.6	1,045
Arizona	4.6	491	5.3	644
Texas	5.4	576	4.5	547
Massachusetts	**	**	4.1	498
Illinois	3.6	384	3.4	413
<b>Cities</b>				
Orlando	23.6	2,518	24.2	2,940
Miami	24.2	2,582	24.1	2,928
Los Angeles	16.8	1,792	17.5	2,126
New York City	17.0	1,814	15.8	1,920
San Francisco	14.3	1,526	13.7	1,665
Las Vegas	13.1	1,398	12.9	1,567
Honolulu Oahu	7.9	843	6.7	814
Washington, D.C.	5.0	533	5.0	608
San Diego	4.5	480	4.8	583
Ft. Lauderdale	**	**	4.4	535
Florida Keys	**	**	3.7	450
Boston	**	**	3.6	437
Chicago	**	**	3.2	389
Tampa-St. Petersburg	**	**	3.2	389

# 2014 Industry Sector Profile: Rental Car

## Select Traveler Characteristics of Those Using Rental Cars

Traveler Characteristics	2013	2014	Change (2)
Advance Trip Decision Time (mean days)	109	112	2.7
Advance Trip Decision Time (median days)	90	90	0.0
Prepaid Package	13	14	0.6
First International Trip to the U.S.	19	19	0.3
Length of Stay in U.S. (mean nights)	16.6	16.1	-0.5
Length of Stay in U.S. (median nights)	12	12	0.0
Number of States Visited (% 1 state)	63	64	0.6
Average Number of States Visited	1.6	1.7	0.1
Hotel/Motel (% 1+ nights)	87	88	1.1
Average # of Nights in Hotel/Motel	10.7	10.6	-0.1
Travel Party Size (mean # of persons)	1.9	2.0	0.1
Gender: % Male (among adults)	65	63	-2.3
Household Income (mean average)	\$107,604	\$100,129	-\$7,475
Household Income (median average)	\$81,200	\$78,530	-\$2,670
Average Age: Female (among adults)	39	39	0.2
Average Age: Male (among adults)	42	42	0.5

(1) Excludes Canada and 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.

This profile shows only a portion of the 37 travel characteristics data reported on international arrivals to the U.S. Additional information may be obtained for a fee. To learn more, please visit our website: <http://travel.trade.gov/research/index.html>

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

Interested in data for your destination? NTTO sells custom reports. To learn more, go to: <http://travel.trade.gov/research/programs/ifs/customized.html>

Source: U.S. Department of Commerce, ITA, National Travel & Tourism Office

Publication Date: June 2015

## 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-seven 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 20	Number of Destinations Visited
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Table 19	Number of States Visited		



# Interested in obtaining data for your organization?

One of the unique features of the Survey program is its 'data-mining' potential. The Survey research data, collected from the questionnaire, is maintained in a computer database. Therefore, customized reports, special tables and data files are available.

To learn more, go to: <http://travel.trade.gov/research/programs/ifs/index.html>

## For NTTO programs of interest visit:

<http://travel.trade.gov/research/index.html>

- Summary of International Travel to the United States (I-94)
- U.S. International Air Traveler Statistics (APIS, formerly I-92)
- Survey of International Air Travelers (SIAT)
- Canadian Statistics
- 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

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