



Office of Travel and Tourism Industries

2011 Sector Profile: Rental Car



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Overseas Visitors Using Rental Cars

[thousands of visitors]	2004	2005	2006	2007	2008	2009	2010	2011	Change 2011/2004
Overseas Visitors ⁽¹⁾	6,198	6,547	6,284	6,785	7,602	6,913	7,962	8,198	2,000
% Change	11	6	-4	8	12	-9	15	3	32
Share of Overseas Visitors	30.5	30.2	29.0	28.4	30.0	29.1	30.2	29.4	
Point Change in Share	-0.5	-0.3	-1.2	-0.6	1.6	-0.9	1.1	-0.8	-1.1

Country of Origin of Visitors Using Rental Cars

Visitor Origin	Market Share 2010 (Percent)	Volume 2010 (000)	Market Share 2011 (Percent)	Volume 2011 (000)
WORLD REGIONS				
Europe	50.5	4,021	50.6	4,148
Western Europe	49.4	3,933	49.4	4,050
Asia	22.1	1,760	22.3	1,828
South America	16.8	1,338	17.5	1,435
COUNTRIES OF RESIDENCE				
United Kingdom	17.8	1,417	16.3	1,336
Germany	9.9	788	10.3	844
Japan	11.7	932	9.9	812

2011 Industry Sector Profile: Rental Car

Information Sources Used to Plan Trip by Those Using Rental Cars

Information Sources Used (multiple response: top 4 of 12)	2010 (Percent)	2011 (Percent)	Point Change (2)
Personal Computer	51	51	0.4
Travel Agency	35	34	-1.9
Airlines Directly	25	24	-0.5
Friends/Relatives	16	16	0.3

Main Purpose of Trip

Main Purpose of Trip (top 4 of 8)	2010 (Percent)	2011 (Percent)	Point Change (2)
Leisure/Rec./Holidays	64	62	-2.0
Business/Professional	18	19	0.7
Visit Friends/Relatives	12	13	0.6
Convention/Conference	3	3	-0.4

All Purposes of Trip

Purpose of Trip (multiple response--top 4 of 8)	2010 (Percent)	2011 (Percent)	Point Change (2)
Leisure/Rec./Holidays	76	75	-1.0
Visit Friends/Relatives	28	26	-1.1
Business/Professional	22	22	0.8
Convention/Conference	6	6	-0.6
NET PURPOSES OF TRIP:			
Leisure & VFR	84	83	-1.1
Business & Convention	25	26	0.6

2011 Industry Sector Profile: Rental Car

Transportation Used in United States by Those Using Rental Cars

Transportation Types Used in United States (multiple response--top 5 of 8)	2010 (Percent)	2011 (Percent)	Point Change (2)
Rented Auto	100	100	0.0
Airlines in U.S.	29	30	0.7
Taxi/Cab/Limousine	26	27	0.8
City Subway/Tram/Bus	19	19	-0.3
Company or Private Auto	9	8	-0.8

Activity Participation While in the United States

Activity Participation While in the U.S. (multiple response--top 10 of 25)	2010 (Percent)	2011 (Percent)	Point Change (2)
Shopping	90	90	0.5
Dining in Restaurants	86	87	0.7
Sightseeing in Cities	45	44	-1.0
Visit Historical Places	42	42	-0.5
Amusement/Theme Parks	42	41	-1.2
Visit Small Towns	37	36	-0.4
Visit National Parks	29	30	0.9
Touring Countryside	28	29	1.2
Water Sports/Sunbathing	28	27	-1.3
Cultural Heritage Sites	26	26	-0.6



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

Visitation to U.S. Destinations/Regions (3)	Market Share 2010 (Percent)	Volume 2010 (000)	Market Share 2011 (Percent)	Volume 2011 (000)
REGIONS				
South Atlantic	45.8	3,647	41.8	3,427
Pacific	30.4	2,420	32.0	2,623
Middle Atlantic	24.1	1,919	25.5	2,090
Mountain	17.4	1,385	19.7	1,615
Pacific Islands	**	**	9.5	779
New England	6.8	541	7.1	582
East North Central	6.7	533	6.6	541
West South Central	5.9	470	6.3	516
STATES				
Florida	36.4	2,898	32.0	2,623
California	29.0	2,309	30.3	2,484
New York	21.1	1,680	22.6	1,853
Nevada	13.6	1,083	15.0	1,230
Hawaiian Islands	**	**	7.9	648
Arizona	**	**	6.2	508
Massachusetts	5.2	414	5.5	451
Texas	**	**	4.7	385
CITIES				
New York City-WP-Wayne	20.4	1,624	21.8	1,787
Orlando	21.2	1,688	18.9	1,549
Los Angeles	18.4	1,465	18.5	1,517
Miami	19.0	1,513	15.7	1,287
San Francisco	14.9	1,186	15.4	1,262
Las Vegas	13.3	1,059	14.5	1,189
Washington, D.C.	6.7	533	6.5	533
Honolulu	**	**	6.4	525
Boston	4.6	366	5.0	410

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Select Traveler Characteristics of Those Using Rental Cars

Traveler Characteristics	2010	2011	Change (2)
Advance Trip Decision Time (mean days)	104	108	3.6 days
Advance Trip Decision Time (median days)	60	70	10.0 days
Prepaid Package	17%	14%	-3.0 pts.
First International Trip to the U.S.	20%	23%	2.9 pts.
Length of Stay in U.S. (mean nights)	16.5	17.0	0.5 nights
Length of Stay in U.S. (median nights)	12	12	0 nights
Number of States Visited (% 1 state)	57%	57%	0.7 pts.
Average Number of States Visited	1.8	1.8	0.0 states
Hotel/Motel (% 1+ nights)	88%	88%	0.7 pts.
Average # of Nights in Hotel/Motel	10.2	10.4	0.2 nights
Travel Party Size (mean # of persons)	1.9	1.8	-0.1
Gender: % Male (among adults)	65%	63%	-2.0 pts.
Household Income (mean average)	\$100,400	\$100,200	-\$200
Household Income (median average)	\$90,000	\$90,100	\$100
Average Age: Female	39	40	0.3 years
Average Age: Male	43	43	0.7 years

(1) Overseas includes all countries except 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.

Note: This profile shows only a portion of the 35 travel characteristics data reported on international arrivals to the United States. Additional information may be obtained for a fee. To learn more, please visit: <http://tinnet.ita.doc.gov/research/programs/ifs/index.html>.

U.K. includes residents of England, Scotland, Wales, and Northern Ireland.

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

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries.

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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:

<http://tinet.ita.doc.gov/research/programs/ifs/customized.html>

For OTTI programs of interest visit:

<http://www.tinet.ita.doc.gov/research/index.html>

- 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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