

U.S. Department of Commerce
International Trade Administration



National Travel and Tourism Office

2013 Sector Profile: Rental Car



2013 Industry Sector Profile: Rental Car

Overseas Visitors Using Rental Cars

[thousands of visitors]	2006	2007	2008	2009	2010	2011	2012	2013	Change 2013/2006
Overseas Visitors ⁽¹⁾	6,284	6,785	7,602	6,913	7,962	8,198	9,643	10,669	4,385
% Change	-4	8	12	-9	15	3	18	11	70
Share of Overseas Visitors	29.0	28.4	30.0	29.1	30.2	29.4	32.4	33.3	
Point Change in Share	-1.2	-0.6	1.6	-0.9	1.1	-0.8	3.0	0.9	4.3

Country of Origin of Visitors Using Rental Cars

Visitor Origin	Market Share 2012 (Percent)	Volume 2012 (000)	Market Share 2013 (Percent)	Volume 2013 (000)
Regions				
Europe	47.9	4,619	43.6	4,652
South America	21.8	2,102	25.2	2,689
Asia	20.4	1,967	20.2	2,155
Oceania	**	**	4.7	501
Countries				
United Kingdom	15.9	1,533	13.6	1,451
Brazil	11.0	1,061	12.0	1,280
Germany	9.8	945	9.4	1,003
Japan	8.9	858	8.0	854
Argentina	4.1	395	4.1	437

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Information Sources Used to Plan Trip by Those Using Rental Cars

Information Sources Used (multiple response: top 6 of 9)	2012 (Percent)	2013 (Percent)	Point Change (2)
Airlines	47	48	1.3
Online Travel Agency	33	35	1.6
Personal Recommendation	29	29	0.3
Travel Agency Office	23	21	-1.9
Travel Guides	16	16	-0.2
Corporate Travel Dept.	13	13	0.3

Main Purpose of Trip

Main Purpose of Trip (top 4 of 8)	2012 (Percent)	2013 (Percent)	Point Change (2)
Vacation/Holiday	67	68	1.1
Business	14	13	-1.3
Visit Friends/Relatives	10	10	0.2
Convention/Conference/Trade Show	6	5	-0.4

All Purposes of Trip

Purpose of Trip (multiple response--top 4 of 8)	2012 (Percent)	2013 (Percent)	Point Change (2)
Vacation/Holiday	76	77	0.5
Visit Friends/Relatives	24	23	-0.9
Business	17	16	-1.0
Convention/Conference/Trade Show	8	8	-0.5
NET PURPOSES OF TRIP:			
Leisure & VFR	83	83	-0.2
Business & Convention	23	21	-1.8

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Transportation Used in United States by Those Using Rental Cars

Transportation Types Used in United States (multiple response--top 6 of 11)	2012 (Percent)	2013 (Percent)	Point Change (2)
Rented Auto	100	100	0.0
Air Travel between U.S. Cities	36	35	-0.8
Auto, Private or Company	22	22	-0.2
Taxicab/Limousine	23	22	-0.8
City Subway/Tram/Bus	22	21	-0.5
Bus between Cities	8	9	1.0

Activity Participation While in the United States

Activity Participation While in the U.S. (multiple response--top 10 of 22)	2012 (Percent)	2013 (Percent)	Point Change (2)
Shopping	91	92	0.8
Sightseeing	77	77	-0.1
Experience Fine Dining	41	42	1.6
Amusement/Theme Parks	40	41	1.3
National Parks/Monuments	41	39	-1.1
Small Towns/Countryside	40	38	-2.0
Historical Locations	31	31	0.0
Art Gallery/Museum	26	25	-0.4
Guided Tours	23	22	-0.8
Nightclubbing/Dancing	15	17	1.5



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

Visitation to U.S. Destinations/Regions (3)	Market Share 2012 (Percent)	Volume 2012 (000)	Market Share 2013 (Percent)	Volume 2013 (000)
Regions				
South Atlantic	45.8	4,416	48.3	5,153
Pacific	28.8	2,777	28.2	3,009
Middle Atlantic	21.7	2,093	20.3	2,166
Mountain	18.6	1,794	17.0	1,814
Pacific Islands	11.5	1,109	11.4	1,216
West South Central	6.3	608	6.6	704
East North Central	7.3	704	5.7	608
New England	6.0	579	5.6	597
States				
Florida	38.3	3,693	40.9	4,364
California	27.1	2,613	26.7	2,849
New York	19.5	1,880	17.8	1,899
Nevada	15.0	1,446	13.4	1,430
Hawaii	9.7	935	9.7	1,035
Texas	4.8	463	5.4	576
Arizona	5.4	521	4.6	491
Illinois	4.7	453	3.6	384
Massachusetts	5.2	501	**	**
Cities				
Miami	19.7	1,900	24.2	2,582
Orlando	22.1	2,131	23.6	2,518
New York City	19.0	1,832	17.0	1,814
Los Angeles	16.5	1,591	16.8	1,792
San Francisco	14.2	1,369	14.3	1,526
Las Vegas	14.5	1,398	13.1	1,398
Honolulu Oahu	7.5	723	7.9	843
Washington, D.C.	5.5	530	5.0	533
San Diego	4.5	434	4.5	480
Boston	4.9	473	**	**
Chicago	4.5	434	**	**

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Select Traveler Characteristics of Those Using Rental Cars

Traveler Characteristics	2012	2013	Change (2)
Advance Trip Decision Time (mean days)	108	109	1.8
Advance Trip Decision Time (median days)	90	90	0.0
Prepaid Package	15	13	-1.4
First International Trip to the U.S.	17	19	1.5
Length of Stay in U.S. (mean nights)	16.8	16.6	-0.2
Length of Stay in U.S. (median nights)	12	12	0.0
Number of States Visited (% 1 state)	59	63	3.9
Average Number of States Visited	1.7	1.6	-0.1
Hotel/Motel (% 1+ nights)	88	87	-1.6
Average # of Nights in Hotel/Motel	11.1	10.7	-0.4
Travel Party Size (mean # of persons)	1.9	1.9	0.0
Gender: % Male (among adults)	63	65	1.7
Household Income (mean average)	\$113,014	\$107,604	-\$5,410
Household Income (median average)	\$85,999	\$81,200	-\$4,799
Average Age: Female (among adults)	39	39	0.0
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

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

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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-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

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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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