



National Travel and Tourism Office

2015 Sector Profile: Rental Car



2015 Industry Sector Profile: Rental Car

Overseas Visitors Using Rental Cars

| [thousands of visitors] | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 ^r | 2015 ¹ | Change 2015/2008 |
|----------------------------------|-------|-------|-------|-------|--------|-------|-------------------|-------------------|---------------------|
| Overseas Visitors ⁽²⁾ | 8,752 | 8,568 | 8,883 | 8,575 | 10,234 | 9,830 | 12,785 | 13,591 | 4,839 |
| % Change | 2 | -2 | 4 | -3 | 19 | -4 | 30 | 7 | 55% |
| Share of Overseas Visitors | 30.0 | 29.1 | 30.2 | 29.4 | 32.4 | 33.3 | 35.3 | 35.4 | |
| Point Change in Share | 2 | -1 | 1 | -1 | 3 | 1 | 2 | 0 | 5 |

Country of Origin of Visitors Using Rental Cars

| Visitor Origin | Market Share 2014 (Percent) | Volume 2014 ^r (000) | Market Share 2015 (Percent) | Volume 2015 ¹ (000) |
|------------------|-----------------------------------|--------------------------------------|-----------------------------------|--------------------------------------|
| Regions | | | | |
| Europe | 41.7 | 5,143 | 43.8 | 5,953 |
| South America | 25.3 | 3,120 | 22.8 | 3,099 |
| Asia | 21.0 | 2,590 | 21.4 | 2,908 |
| Oceania | 4.7 | 580 | 4.6 | 625 |
| Central America | ** | ** | 2.3 | 313 |
| Countries | | | | |
| United Kingdom | 12.0 | 1,480 | 13.6 | 1,848 |
| Brazil | 12.1 | 1,492 | 10.4 | 1,413 |
| Germany | 8.5 | 1,048 | 9.3 | 1,264 |
| P. R. of China | ** | ** | 6.7 | 911 |
| Japan | 7.2 | 888 | 6.1 | 829 |
| Korea, South | ** | ** | 5.3 | 720 |
| France | 5.1 | 629 | 4.7 | 639 |
| Australia | 3.8 | 469 | ** | ** |
| Argentina | 3.6 | 444 | 3.6 | 489 |
| Colombia | 3.5 | 432 | 3.0 | 408 |

2015 Industry Sector Profile: Rental Car

Main Purpose of Trip

| Main Purpose of Trip | 2014 (Percent) | 2015 (Percent) | Point Change ⁽³⁾ |
|----------------------------------|-------------------|-------------------|--------------------------------|
| Vacation/Holiday | 70 | 69 | -0.4 |
| Business | 12 | 12 | 0.0 |
| Visit Friends/Relatives | 10 | 10 | 0.1 |
| Convention/Conference/Trade Show | 4 | 5 | 0.6 |
| Education | 3 | 3 | 0.1 |
| Health Treatment | 0.4 | 1 | 0.1 |
| Religion/Pilgrimages | 0.2 | 0.1 | -0.1 |
| Other | 1 | 0.3 | -0.3 |

All Purposes of Trip

| Purpose of Trip (multiple responses) | 2014 (Percent) | 2015 (Percent) | Point Change ⁽³⁾ |
|--------------------------------------|-------------------|-------------------|--------------------------------|
| Vacation/Holiday | 78 | 78 | -0.2 |
| Visit Friends/Relatives | 24 | 25 | 1.2 |
| Business | 16 | 15 | -0.6 |
| Convention/Conference/Trade Show | 7 | 7 | 0.5 |
| Education | 4 | 5 | 0.5 |
| Health Treatment | 1 | 1 | -0.2 |
| Religion/Pilgrimages | 1 | 1 | 0.1 |
| Other | 1 | 0.4 | -0.6 |
| | | | |
| NET PURPOSES OF TRIP: | | | |
| Leisure & VFR | 85 | 85 | 0.0 |
| Business & Convention | 21 | 20 | -0.2 |

2015 Industry Sector Profile: Rental Car

Information Sources Used to Plan Trip by Those Using Rental Cars

| Information Sources Used (multiple responses) | 2014 (Percent) | 2015 (Percent) | Point Change ⁽³⁾ |
|---|-------------------|-------------------|--------------------------------|
| Airlines | 47 | 48 | 1.3 |
| Online Travel Agency | 37 | 38 | 1.2 |
| Personal Recommendation | 29 | 30 | 0.8 |
| Travel Agency Office | 21 | 19 | -1.7 |
| Travel Guides | 16 | 16 | 0.0 |
| Corporate Travel Dept. | 12 | 12 | -0.5 |
| National/State/City Travel Office | 12 | 10 | -2.0 |
| Tour Operator/Travel Club | 9 | 8 | -0.8 |
| Other | 6 | 6 | -0.1 |

Transportation Used in United States by Those Using Rental Cars

| Transportation Types Used in United States (multiple responses) | 2014 (Percent) | 2015 (Percent) | Point Change ⁽³⁾ |
|--|-------------------|-------------------|--------------------------------|
| Rented Auto | 100 | 100 | 0.0 |
| Air Travel between U.S. Cities | 31 | 29 | -2.1 |
| Auto, Private or Company | 21 | 21 | 0.0 |
| Taxicab/Limousine | 19 | 19 | 0.0 |
| City Subway/Tram/Bus | 19 | 19 | -0.3 |
| Bus between Cities | 9 | 9 | 0.0 |
| Ferry/River Taxi/Srt Scenic Cruise | 7 | 7 | 0.0 |
| Cruise Ship/River Boat 1+ Nights | 4 | 4 | 0.1 |
| Railroad between Cities | 4 | 4 | 0.5 |
| Rented Bicycle/Motorcycle/Moped | 3 | 4 | 0.4 |
| Motor Home/Camper | 1 | 1 | 0.1 |

2015 Industry Sector Profile: Rental Car

Activity Participation While in the United States

| Activity Participation While in the U.S. (multiple responses) | 2014 (Percent) | 2015 (Percent) | Point Change ⁽³⁾ |
|--|-------------------|-------------------|--------------------------------|
| Shopping | 91 | 89 | -1.4 |
| Sightseeing | 77 | 77 | 0.1 |
| Amusement/Theme Parks | 42 | 42 | 0.1 |
| National Parks/Monuments | 40 | 41 | 1.3 |
| Experience Fine Dining | 42 | 41 | -1.4 |
| Small Towns/Countryside | 37 | 38 | 0.5 |
| Historical Locations | 30 | 30 | 0.8 |
| Art Gallery/Museum | 25 | 26 | 1.4 |
| Guided Tours | 22 | 21 | -0.8 |
| Cultural / Ethnic Heritage Sites | 16 | 17 | 1.2 |
| Sporting Event | 14 | 15 | 0.5 |
| Nightclubbing/Dancing | 15 | 14 | -1.2 |
| Concert/Play/Musical | 16 | 14 | -1.8 |
| Water Sports | 11 | 12 | 0.7 |
| Casinos/Gamble | 12 | 12 | 0.2 |
| American Indian Communities | 6 | 7 | 0.3 |
| Camping/Hiking | 6 | 7 | 0.3 |
| Environ./Eco. Excursions | 5 | 5 | 0.4 |
| Golfing/Tennis | 5 | 4 | -0.1 |
| Hunting/Fishing | 2 | 2 | -0.3 |
| Snow Sports | 2 | 1 | -0.4 |
| Other | 2 | 1 | -0.4 |



2015 Industry Sector Profile: Rental Car

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

| Visitation to U.S. Destinations/Regions (4) | Market Share 2014 (Percent) | Volume 2014 ^r (000) | Market Share 2015 (Percent) | Volume 2015 ¹ (000) |
|---|-----------------------------|--------------------------------|-----------------------------|--------------------------------|
| Regions | | | | |
| South Atlantic | 49.34 | 6,085 | 49.16 | 6,681 |
| Pacific | 28.30 | 3,490 | 28.94 | 3,933 |
| Middle Atlantic | 18.93 | 2,335 | 18.10 | 2,460 |
| Mountain | 17.09 | 2,108 | 17.15 | 2,331 |
| Pacific Islands | 10.69 | 1,318 | 10.34 | 1,405 |
| West South Central | 5.78 | 713 | 6.21 | 844 |
| New England | 5.26 | 649 | 5.80 | 788 |
| East North Central | 5.79 | 714 | 5.59 | 760 |
| States | | | | |
| Florida | 41.87 | 5,164 | 41.72 | 5,670 |
| California | 26.75 | 3,299 | 27.07 | 3,679 |
| New York | 16.54 | 2,040 | 15.85 | 2,154 |
| Nevada | 13.22 | 1,630 | 13.33 | 1,812 |
| Hawaii | 8.59 | 1,059 | 7.85 | 1,067 |
| Arizona | 5.26 | 649 | 5.11 | 695 |
| Massachusetts | 4.11 | 507 | 4.93 | 670 |
| Texas | 4.52 | 557 | 4.76 | 647 |
| Illinois | 3.40 | 419 | 3.38 | 459 |
| Cities | | | | |
| Miami | 24.12 | 2,975 | 24.57 | 3,339 |
| Orlando | 24.19 | 2,983 | 23.77 | 3,231 |
| Los Angeles | 17.48 | 2,156 | 17.40 | 2,365 |
| New York City | 15.77 | 1,945 | 15.12 | 2,055 |
| San Francisco | 13.67 | 1,686 | 13.74 | 1,867 |
| Las Vegas | 12.88 | 1,588 | 13.02 | 1,770 |
| Honolulu Oahu | 6.67 | 823 | 6.34 | 862 |
| Washington, D.C. | 4.97 | 613 | 5.75 | 781 |
| San Diego | 4.81 | 593 | 4.91 | 667 |
| Boston | 3.57 | 440 | 4.33 | 588 |
| Ft. Lauderdale | 4.39 | 541 | 4.33 | 588 |
| Florida Keys | 3.73 | 460 | 3.92 | 533 |
| Flagstaff/Grand Canyon/Sedona | ** | ** | 3.66 | 497 |
| Chicago | 3.16 | 390 | 3.26 | 443 |
| Tampa-St. Petersburg | 3.24 | 400 | 3.10 | 421 |

2015 Industry Sector Profile: Rental Car

Select Traveler Characteristics of Those Using Rental Cars

| Traveler Characteristics | 2014 | 2015 | Change (3) |
|--|-----------|----------|------------|
| Advance Trip Decision Time (mean days) | 112 | 118 | 6.1 |
| Advance Trip Decision Time (median days) | 90 | 90 | 0.0 |
| Prepaid Package | 14 | 13 | -1.3 |
| First International Trip to the U.S. | 19 | 19 | 0.3 |
| Length of Stay in U.S. (mean nights) | 16.1 | 17.1 | 1.0 |
| Length of Stay in U.S. (median nights) | 12 | 12 | 0.0 |
| Number of States Visited (% 1 state) | 64 | 64 | 0.5 |
| Average Number of States Visited | 1.7 | 1.7 | 0.0 |
| Hotel/Motel (% 1+ nights) | 88 | 86 | -1.8 |
| Average # of Nights in Hotel/Motel | 10.6 | 11.2 | 0.6 |
| Travel Party Size (mean # of persons) | 2.0 | 2.0 | 0.0 |
| Gender: % Male (among adults) | 63 | 63 | 0.5 |
| Household Income (mean average) | \$100,129 | \$94,945 | -\$5,184 |
| Household Income (median average) | \$78,530 | \$73,255 | -\$5,275 |
| Average Age: Female (among adults) | 39 | 39 | -0.2 |
| Average Age: Male (among adults) | 42 | 42 | -0.2 |

- (1) 2015 arrivals and percent change reflect a combination of additional records counted and market conditions.
- (2) Excludes Canada and Mexico
- (3) Percentage-point and percentage changes are based on non-rounded data.
- (4) 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.
- (r) Estimate was revised.
- (p) Estimate is preliminary and subject to revision.

This profile shows only a portion of the 37 travel characteristics data reported on international arrivals to the United States. 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? The 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: July 2016

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 |
| Table 2 | Information Sources | Table 21 | Transportation in the U.S. |
| Table 3 | Advance Trip Decision | Table 22 | Port of Entry |
| Table 4 | Advance Airline Reservation | Table 23 | Main Destination |
| Table 5 | Means of Booking Air Trip | Table 24 | U.S. Destinations Visited |
| Table 6 | Advance Air Ticket Payment | Table 25 | Leisure Activities |
| Table 7 | Prepaid, Inclusive Tour Package | Table 26 | Total Trip Expenditures |
| Table 8 | Pre-Booked Lodging | Table 27 | Itemized Trip Expenditures |
| Table 9 | Travel Insurance Purchased | Table 28 | Trip Payment Methods - Average |
| Table 10 | Travel Companions | Table 29 | Payment Methods- Frequency |
| Table 11 | Travel Party Size | Table 30 | Payment Methods - Expen.Weighted |
| Table 12 | Main Purpose of Trip | Table 31 | Factors in Airline Choice |
| Table 13 | Purpose(s) of Trip | Table 32 | Main Factor in Airline Choice |
| Table 14 | Type of Accommodation | Table 33 | Seating Area |
| Table 15 | Nights in the U.S. | Table 34 | Type of Airline Ticket |
| Table 16 | Total Nights Away From Home | Table 35 | Gender and Age of Travelers |
| Table 17 | First Trip to the U.S. | Table 36 | Occupation |
| Table 18 | U.S. Trips Last 12 months | Table 37 | Annual Household Income |
| 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

U.S. Department of Commerce

International Trade Administration
Industry & Analysis
National Travel and Tourism Office
1401 Constitution Ave, NW
Washington, D.C. 20230
Phone: (202) 482-0140
Fax: (202) 482-2887
ntto@trade.gov

<http://travel.trade.gov>