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2010 Car Traveler's Road to Decision

The Role of Digital on Car Travelers

Google/OTX

U.S., September 2010

Research Methodology

- Category Covered: Rental Car
- Survey of 5,000 travelers
- An augment of 1,500 affluent personal travelers was also recruited
- Partnered with OTX; interviews conducted 4/21/10 – 5/1/10


Traveler Types Defined



Personal Traveler
has taken at least one trip for leisure in the past 6 months



Business Traveler
has taken at least three trips for business in the past 6 months



Affluent Traveler
has taken at least one trip for leisure in the past 6 months and has a household income of \$200K+

Key Findings

- 1** Echoing trends from the 2009 results of this study, nearly 50% of Business Travelers choose to rent a car when driving to a travel destination.

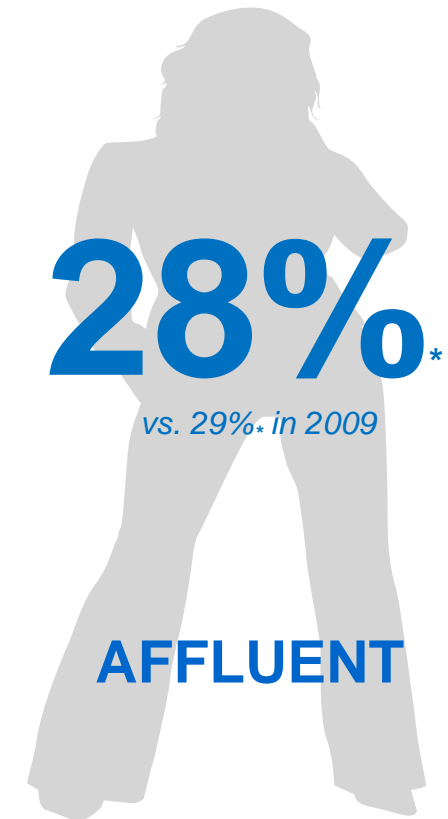
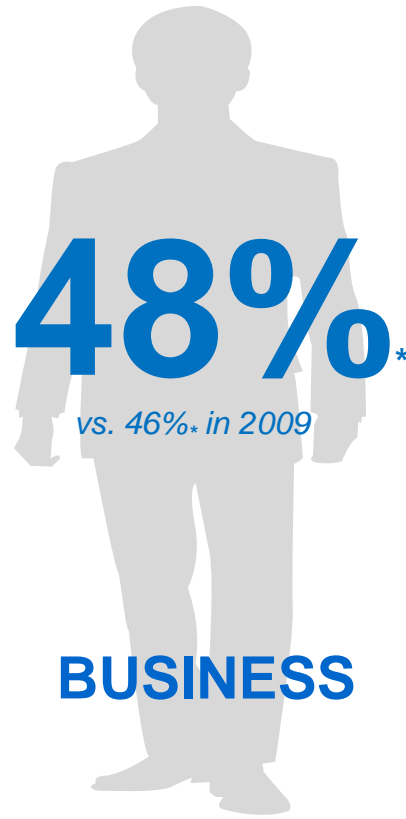
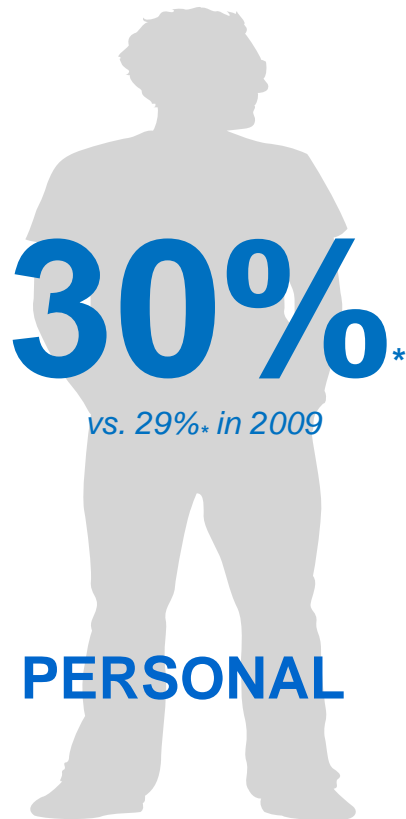
- 2** The Internet, especially search engines, are the top choice for car rental research.

- 3** Online, either direct from an agency or from an OTA, continues to be the preferred booking.

- 4** 95+% of travelers comparison shop, mainly with Google, Expedia, Orbitz & Travelocity and rent based on price.

- 5** Enterprise remains market leader; however, Affluent Travelers favor Hertz.

Business Travelers continue to rent more cars, more often than Personal and Affluent travelers



When you drive to a travel destination, how often do you rent a car vs. driving one that you / someone in your household owns?

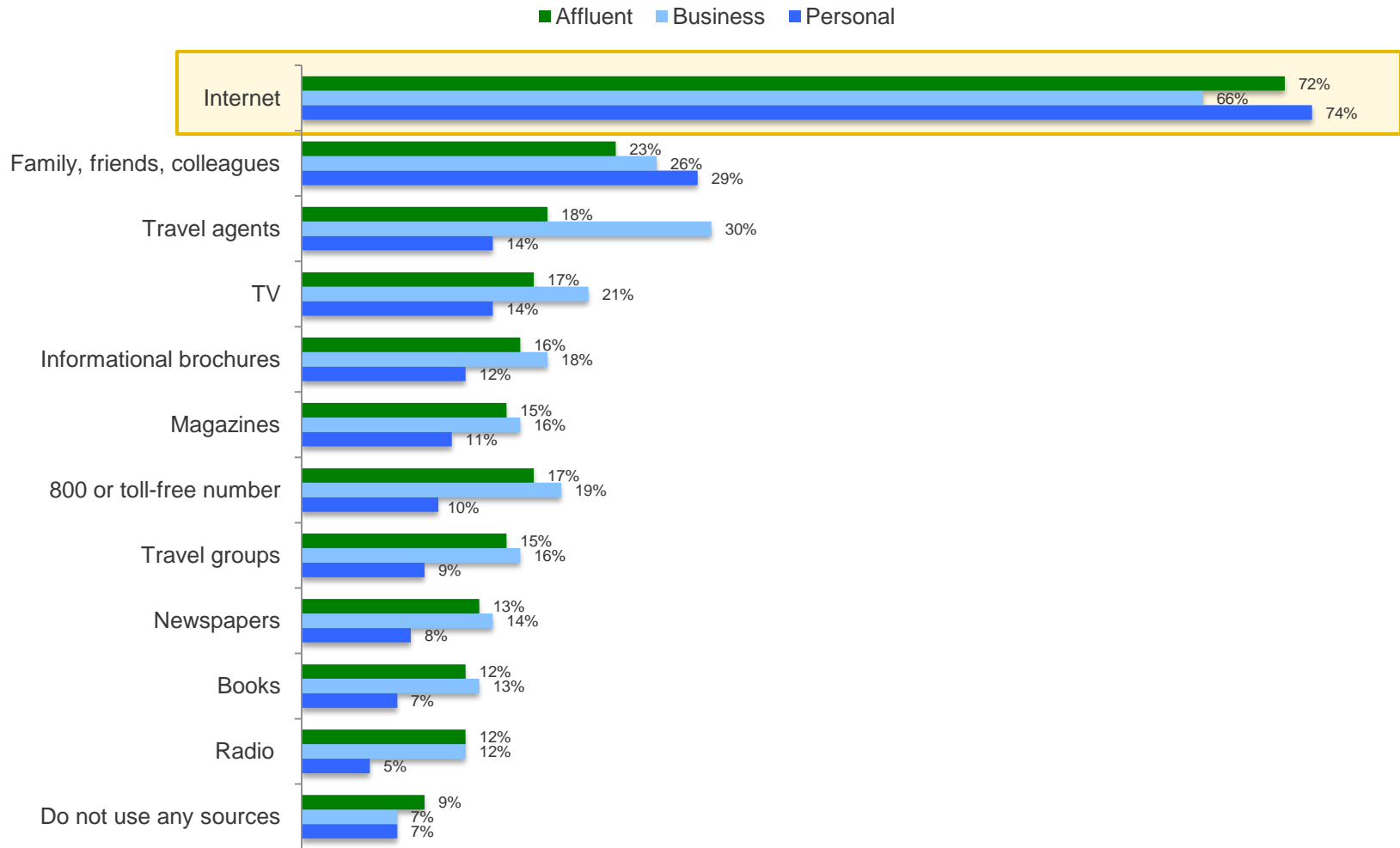
Source: 2010 Traveler's Road to Decision - Cars, Google/OTX, September 2010

*Top 2 box summary

(QW0) Thinking of destinations that you drive to for personal / business trips, how often do you rent a car, rather than driving a vehicle you / someone in your household owns?

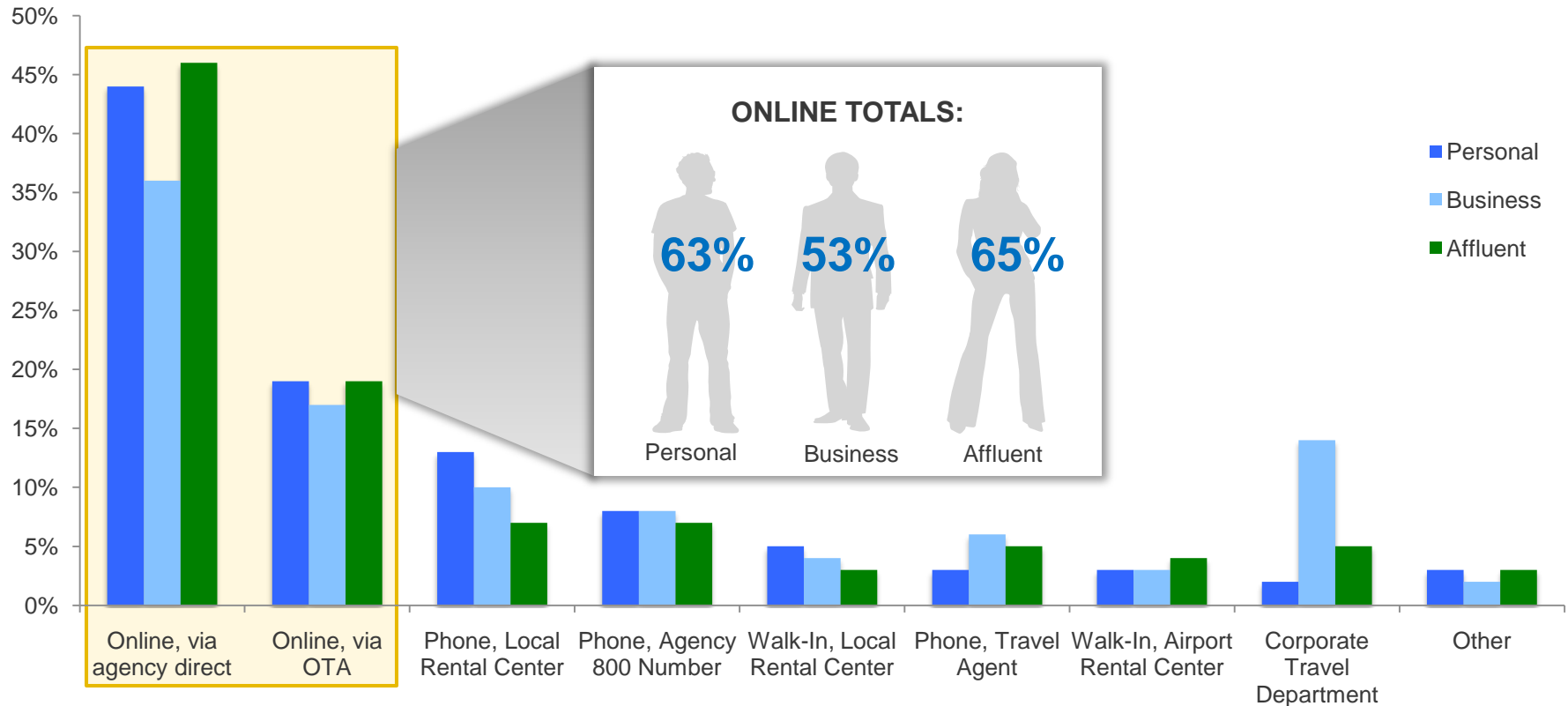
Personal (n=1,348), Business (n=959) & Affluent (n=852)

The Internet dominates as the top choice for car rental research for all three types of travelers



Consumers continue to go online to rent cars

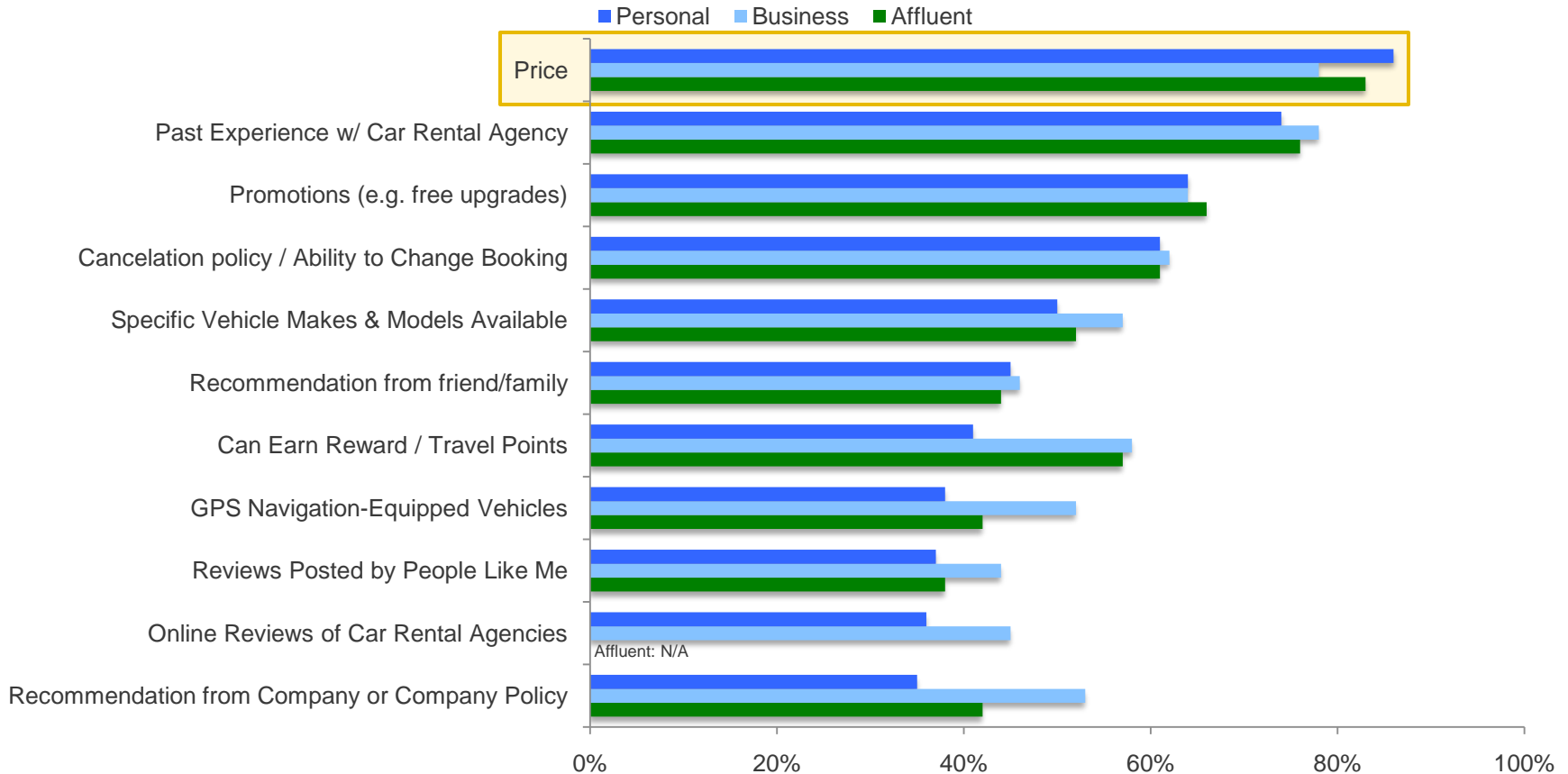
Methods Used to Rent a Car



As trends continue to highlight how consumers rent cars online, an accessible, easy to use booking engine is critical in driving conversions.

Price and Past Experience drive commitment

Important Features When Choosing Car Rental Agency (Top 2 Box)



Compelling price points and promotions in search and display ads are crucial for bookings.

Personal travelers actively comparison shop...



97%

**Some extent
every time**



68%

always/frequently

...when researching their car rental options.

Marketers must have a comprehensive and competitive search strategy complemented with remarketing across the Google Display Network to lure new and existing users to book quicker.

Business travelers actively comparison shop...



93%

**Some extent
every time**



66%

always/frequently

...when researching their car rental options.

Marketers must have a comprehensive and competitive search strategy complemented with remarketing across the Google Display Network to lure new and existing users to book quicker.

Affluent travelers actively comparison shop...



95%

**Some extent
every time**

72%

always/frequently

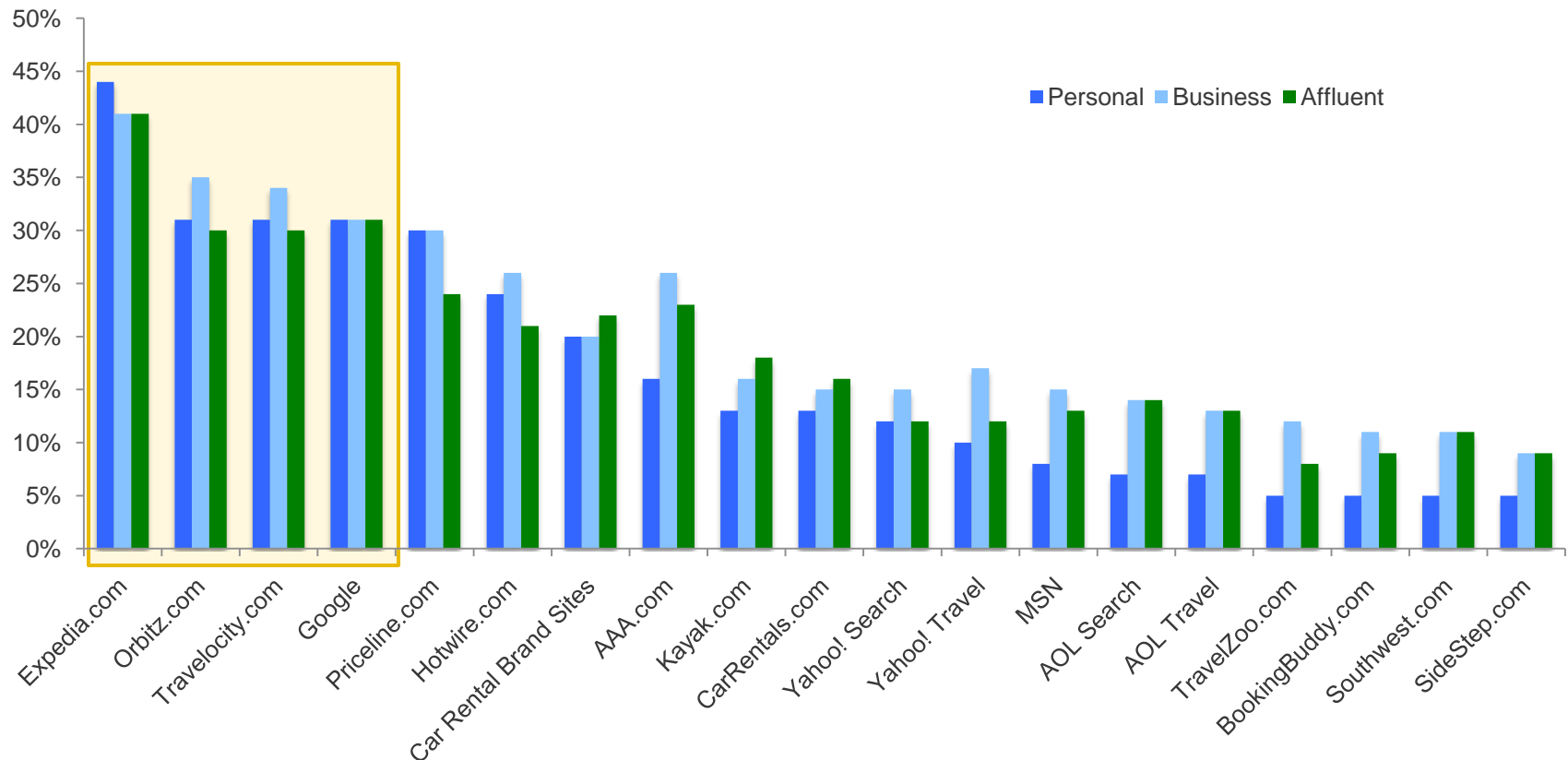
...when researching their car rental options.

Marketers must have a comprehensive and competitive search strategy complemented with remarketing across the Google Display Network to lure new and existing users to book quicker.

Google remains a top source for comparing

While Expedia, Orbitz and Travelocity all maintained share in this year's study, Google continues to surpass other major OTA and metasearch players. Leverage this traffic for your site.

Top Sites Used To Comparison Shop For Rental Cars



No company owns full market penetration

Car Rental Company Used (Past 6 Months)

Top 5 companies
the same across
all segments

Company	Personal	Business	Affluent
Enterprise	42%	43%	35%
Hertz	31%	42%	43%
Budget	29%	34%	30%
Avis	21%	36%	30%
Alamo	16%	22%	23%
AAA.com	13%	19%	19%
National	10%	22%	19%
Dollar	10%	20%	19%
Thrifty	7%	12%	12%
Advantage	5%	13%	13%
CarRentals.com	3%	11%	8%
Payless	3%	8%	6%
EZ	3%	8%	7%
Europcar	2%	8%	9%
Practical	2%	5%	5%



Most used (over 35%)

Opportunity exists to target the three types of rental consumers with unique value propositions to help grow market share.

Data into Action: Marketing Opportunities

- 1 Design persuasive ad text and display banners to encourage the undecided traveler to rent with your brand.
- 2 Develop an extensive online booking engine that is easy to navigate and user-friendly to allow quick online bookings.
- 3 Publish competitive price points and enticing promotions in your ads to help drive personal travelers' decisions.
- 4 Target affluent and business travelers by communicating brand loyalty programs and/or perks of renting frequently.
- 5 Develop an “always-on” comprehensive search and display strategy to be top of mind across the Internet to capture the majority that frequently comparison shop.

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