



Car traveler's road to decision 2012

Google/Ipsos OTX MediaCT
U.S., July 2012

Objective

Understand how consumers research and gather information about car rental throughout the booking process.

- What role does **the internet** play in travel planning?
- How does **loyalty membership** effect purchase behavior?
- Does the **research process** vary by traveler type?
- What **factors** do renters consider when booking a car rental?
- How are consumers using **mobile** to research and book cars?

Methodology

- Google commissioned OTX, an independent marketing research company, to conduct a travel tracking study to better understand the role travel plays in the lives of U.S.
- Respondents completed a 21 minute attitude & usage survey into travel habits and attitudes. If qualified, respondents were routed to one of four deep dive sections: Airline, Cruise, Lodgings, and Car Rental
- Interviews were conducted from 4/24/12 to 5/17/12 yielding a total sample of 5,000 consumers, age 21-64, who have traveled at least once for leisure reasons (or a minimum of 3 times for business purposes) in the past six months
- An augment of 1,500 affluent leisure travelers and 1,000 cruisers were also recruited

Traveler types defined



Leisure 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



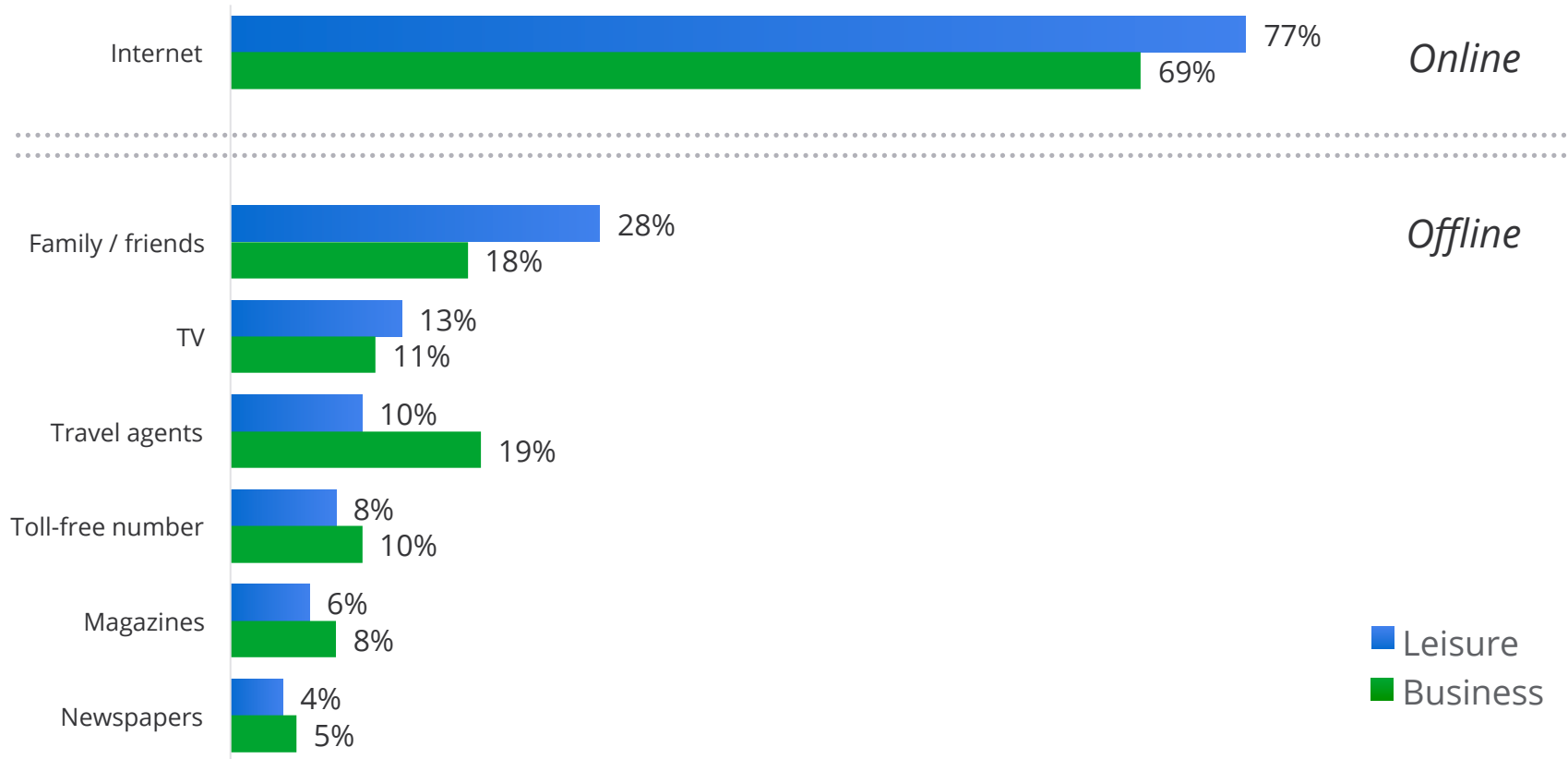
Affluent traveler
has taken at least one trip for leisure
in the past 6 months and has a
household income of \$250K+

Key car rental insights

- 1** 2 in 3 travelers book rental cars online, 2x the offline booking rate
- 2** Travelers use internet most for researching rental cars – meanwhile they continue to decrease use of offline media such as print, TV and magazines
- 3** 1 in 2 business and affluent travelers belong to a car rental loyalty program v. only 1 in 5 leisure travelers
- 4** Travelers use the mobile web 2x to 5x more than mobile apps to book rental cars on mobile
- 5** While car renters are sensitive to price and promotions, they also take social recommendations, mobile tools, and environmental factors into account when choosing which rental car to book

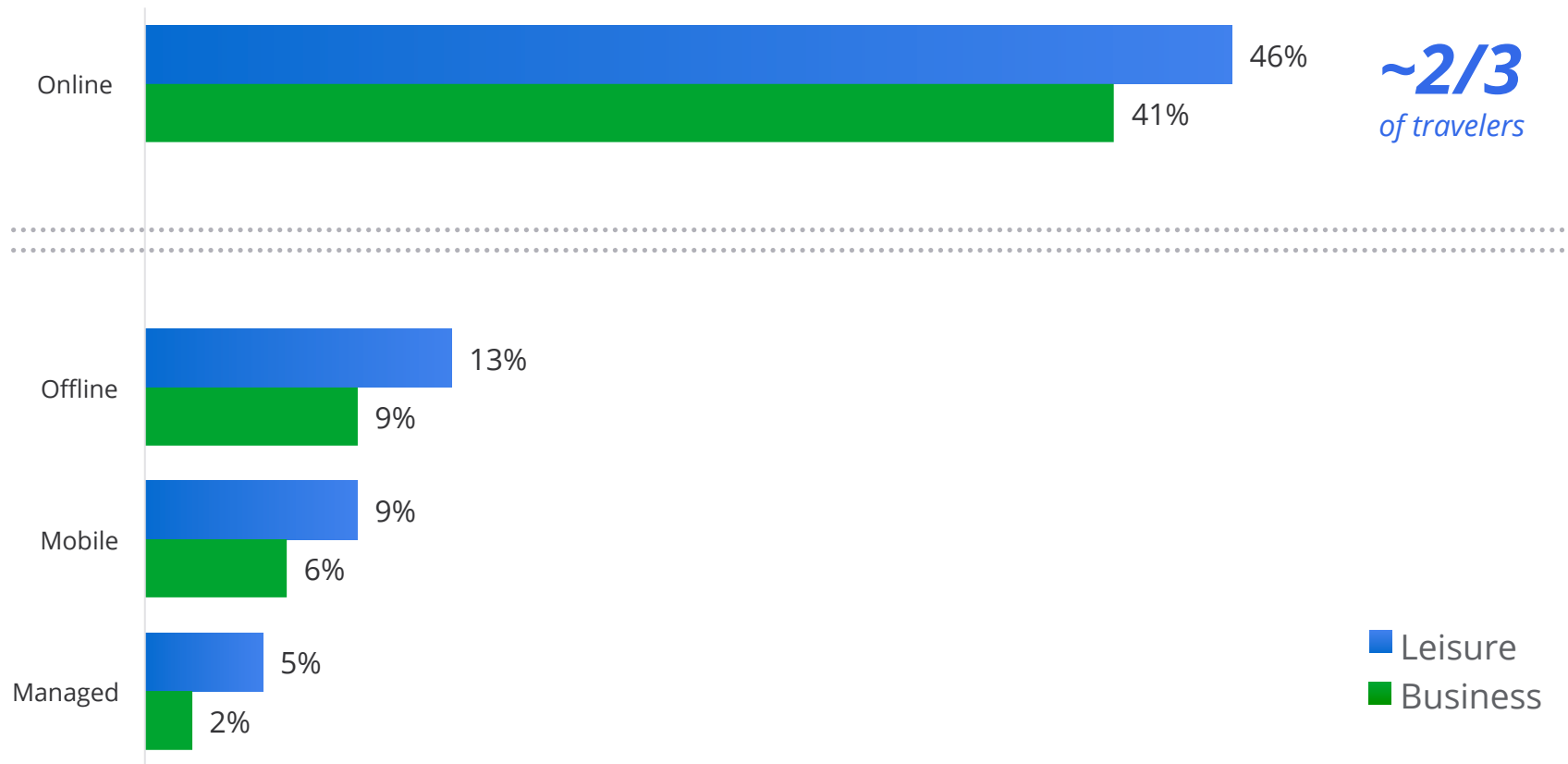
Travelers continue to shift from offline to online media to research car rentals

Sources used to research rental cars



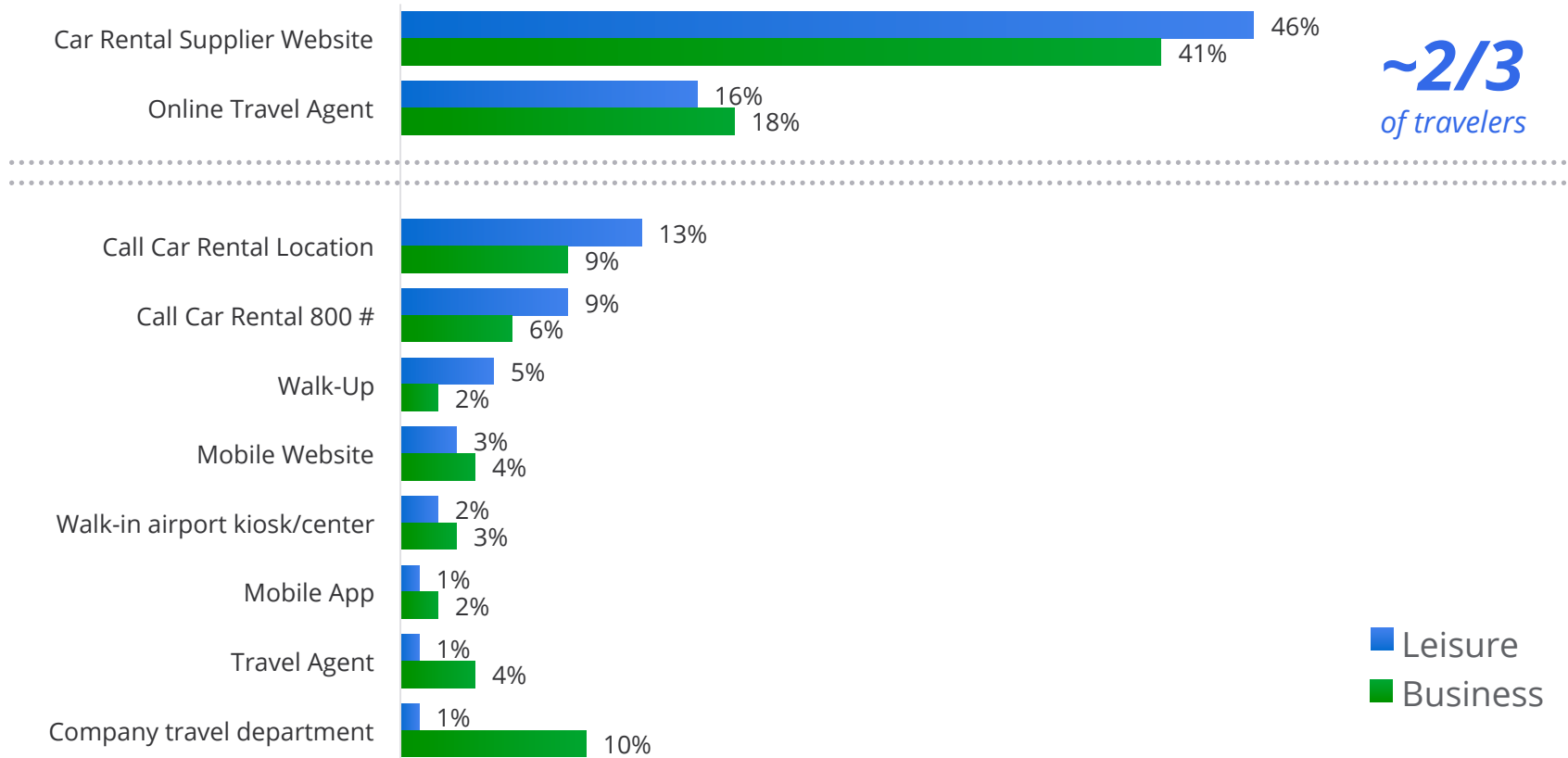
Nearly 2/3 of travelers reserve rental cars online

Typical car rental booking method, by channel

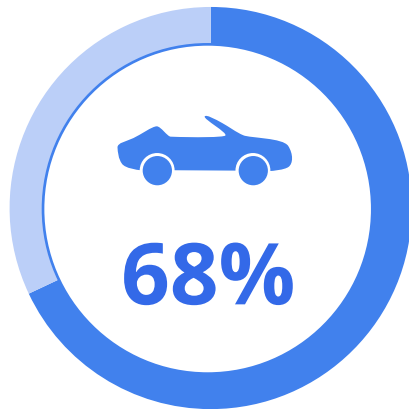


~2/3 of travelers book rental cars online, 2x the rate of offline booking

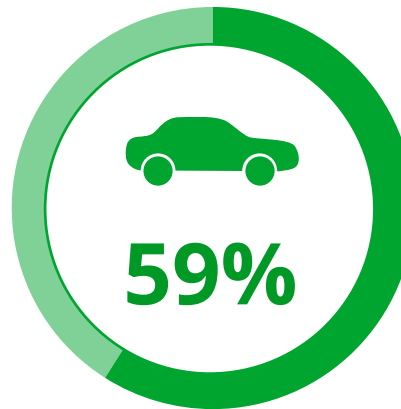
Typical booking method



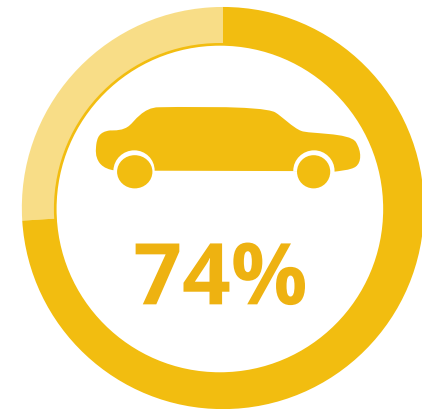
Travelers frequently comparison shop online when choosing rental cars



Leisure travelers



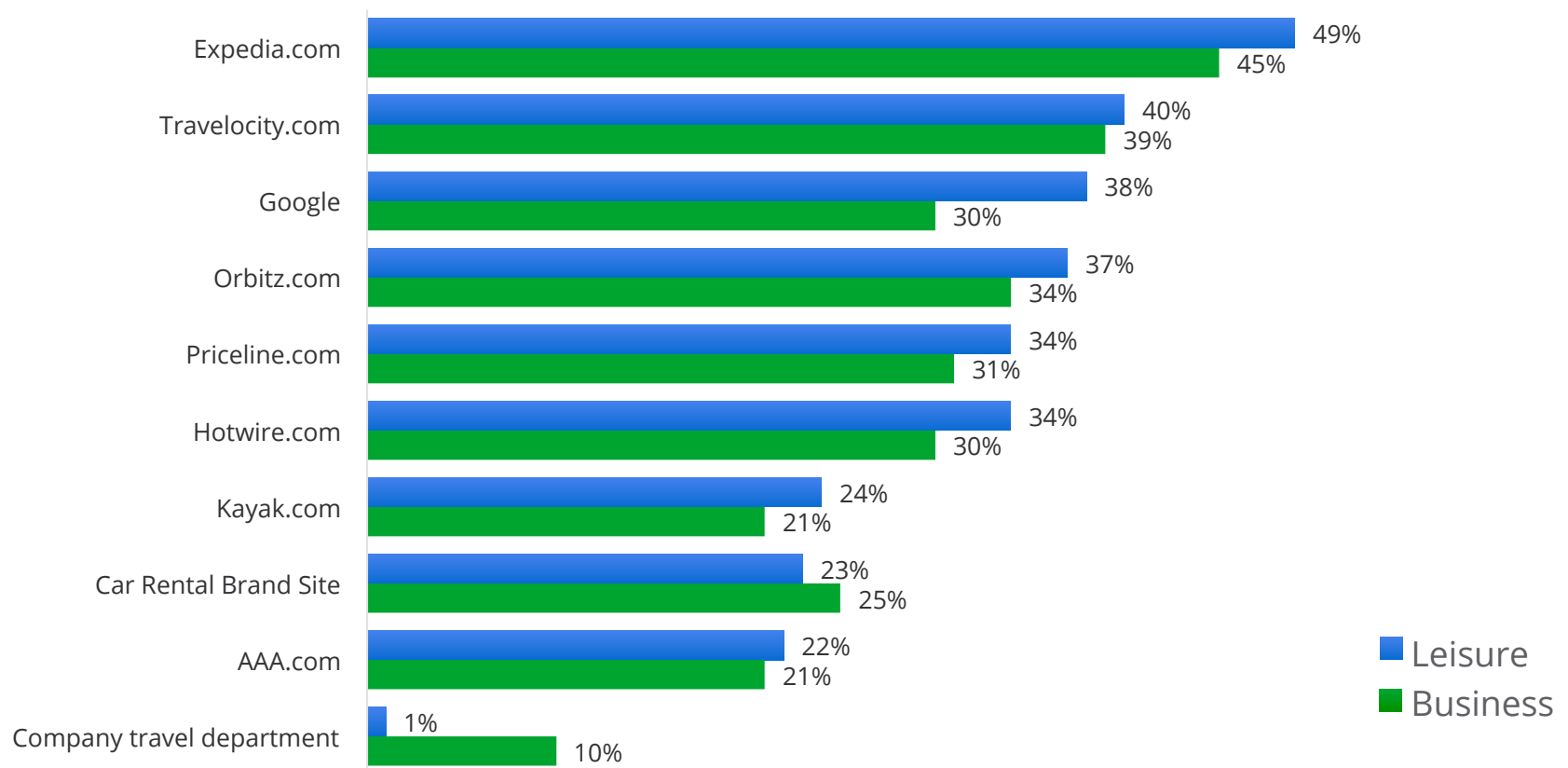
Business travelers



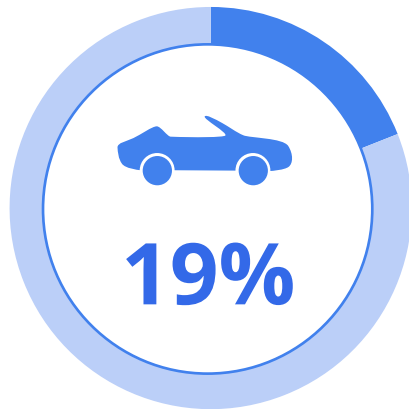
Affluent travelers

Expedia, Travelocity and Google top destinations for online car rental comparison shopping

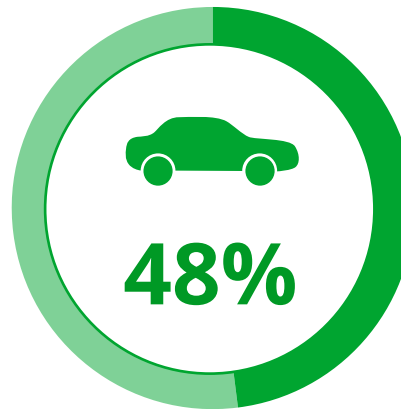
Sources used to choose a car rental brand to rent from



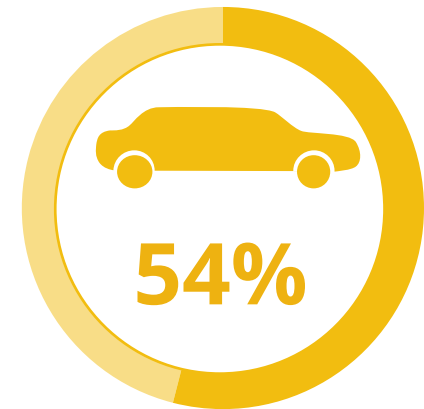
~20% of leisure travelers belong to a car rental loyalty program v. ~50% of business / affluent
Travel loyalty program membership, by kind/traveler type



Leisure travelers



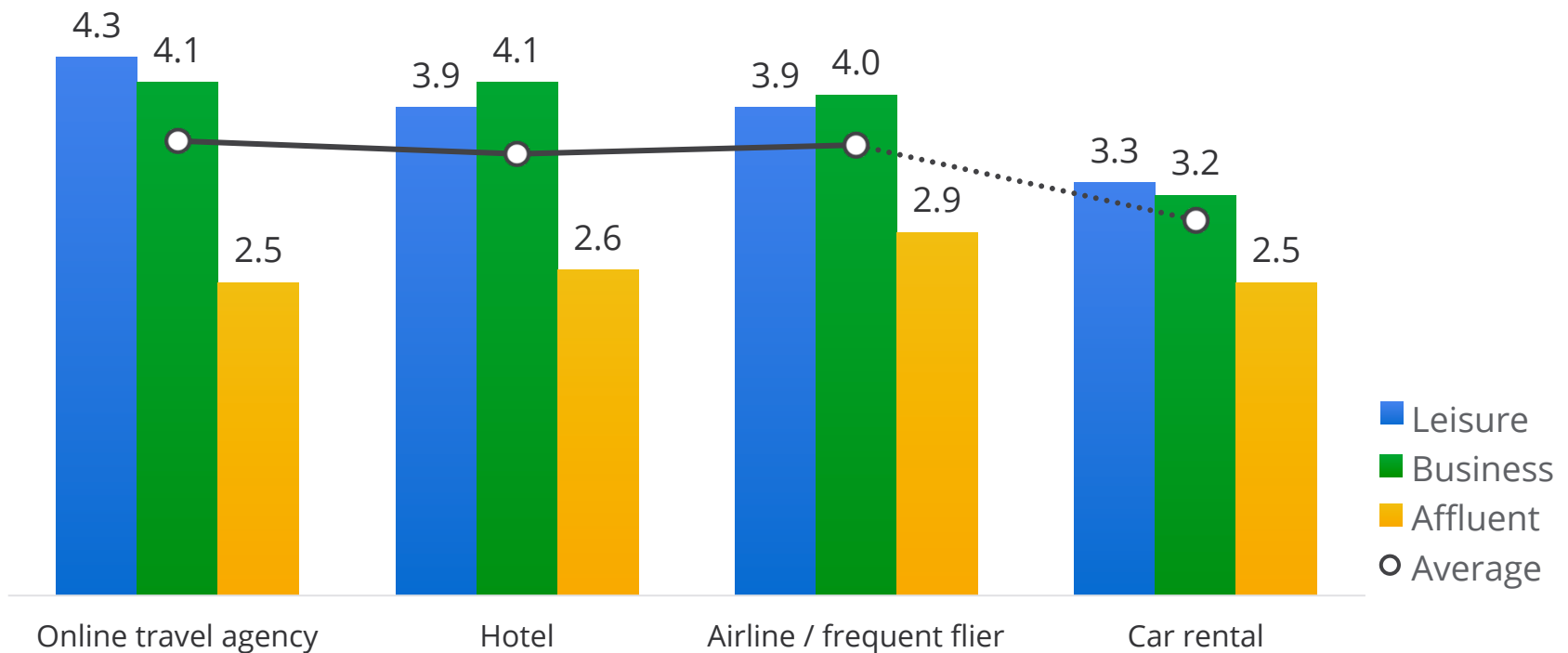
Business travelers



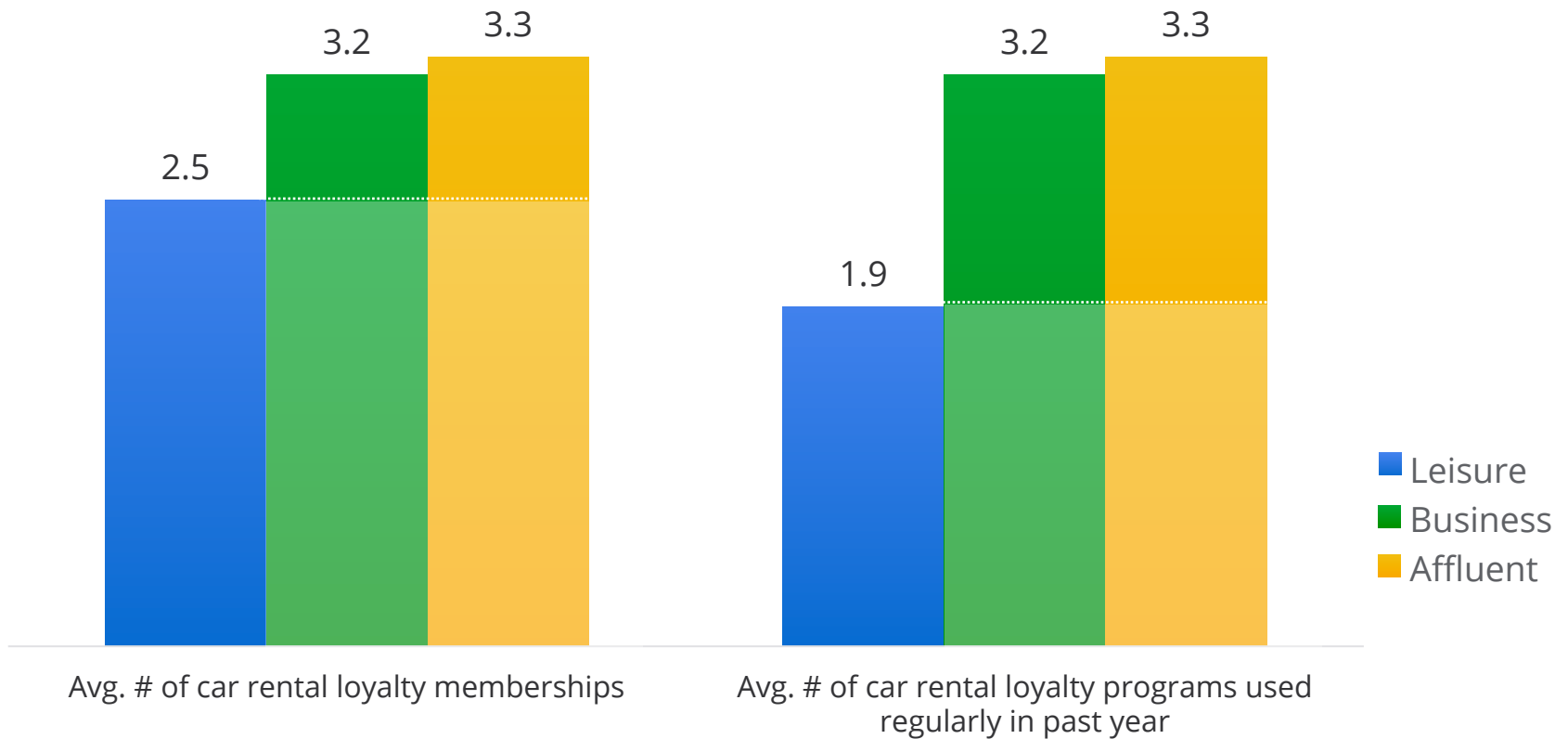
Affluent travelers

On average, travelers belong to ~3 car rental loyalty programs, fewer than other categories

Number of travel loyalty program memberships

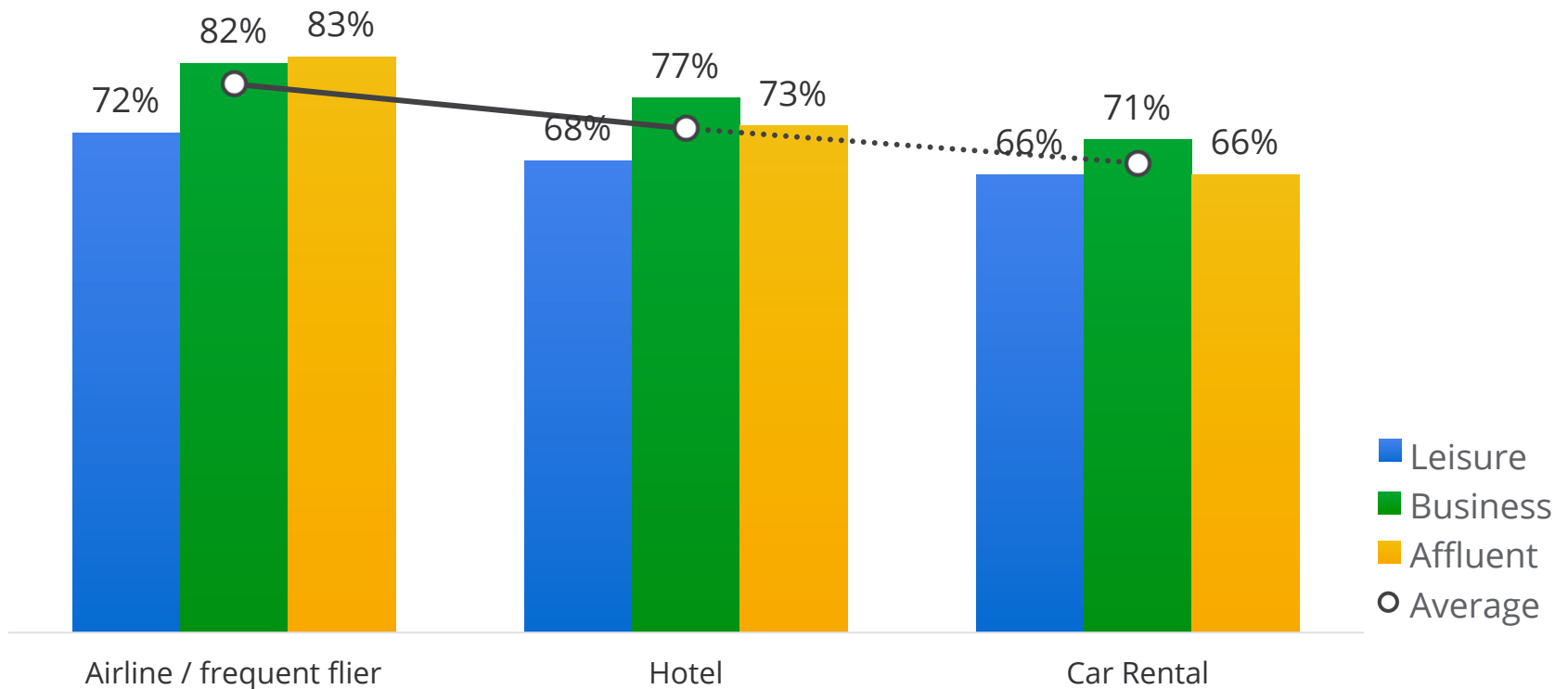


Affluent and business travelers utilize all car rental loyalty programs to which they belong



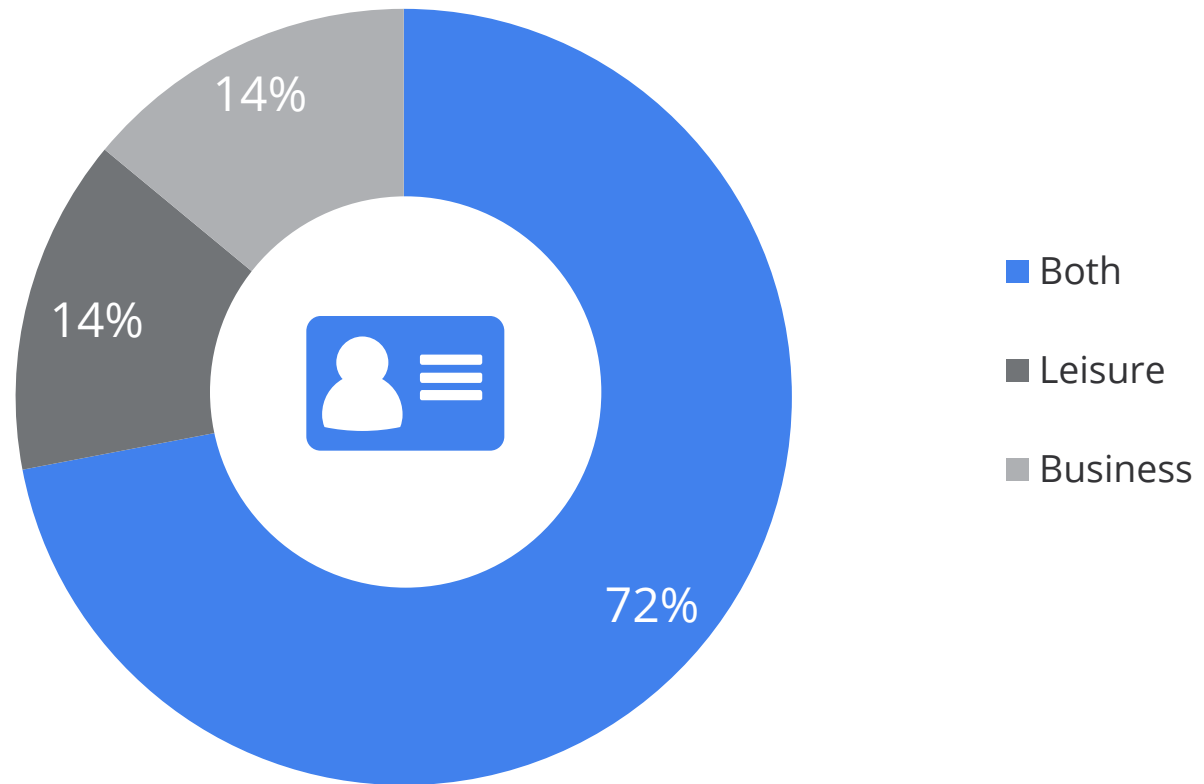
Car rental loyalty members are less likely to be brand loyal than hotel / air members

Likelihood to book with brand if part of loyalty program



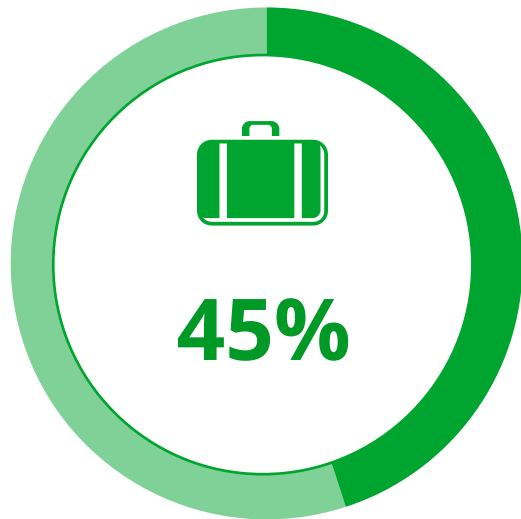
Business travelers use car rental loyalty programs for both business and leisure trips

Car rental loyalty program usage, by type of travel

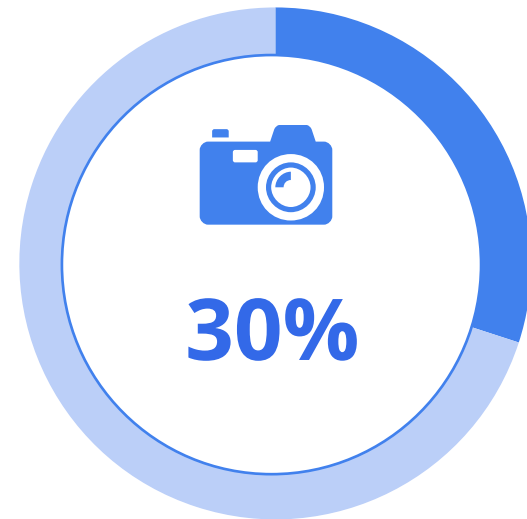


Business travelers are significantly more likely to rent cars on business/leisure trips

Car rental loyalty program usage, by type of travel



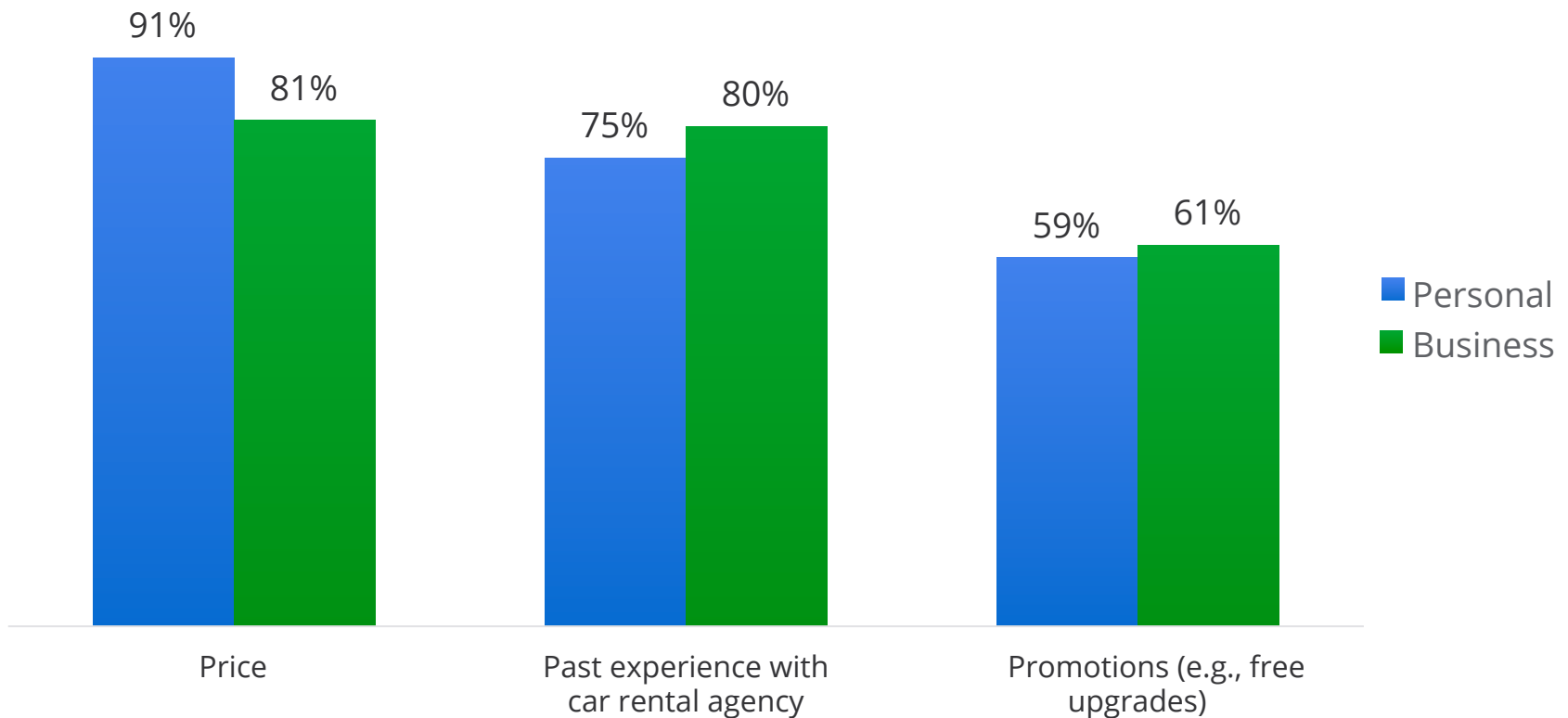
Business travelers frequently / always rent cars



Leisure travelers frequently / always rent cars

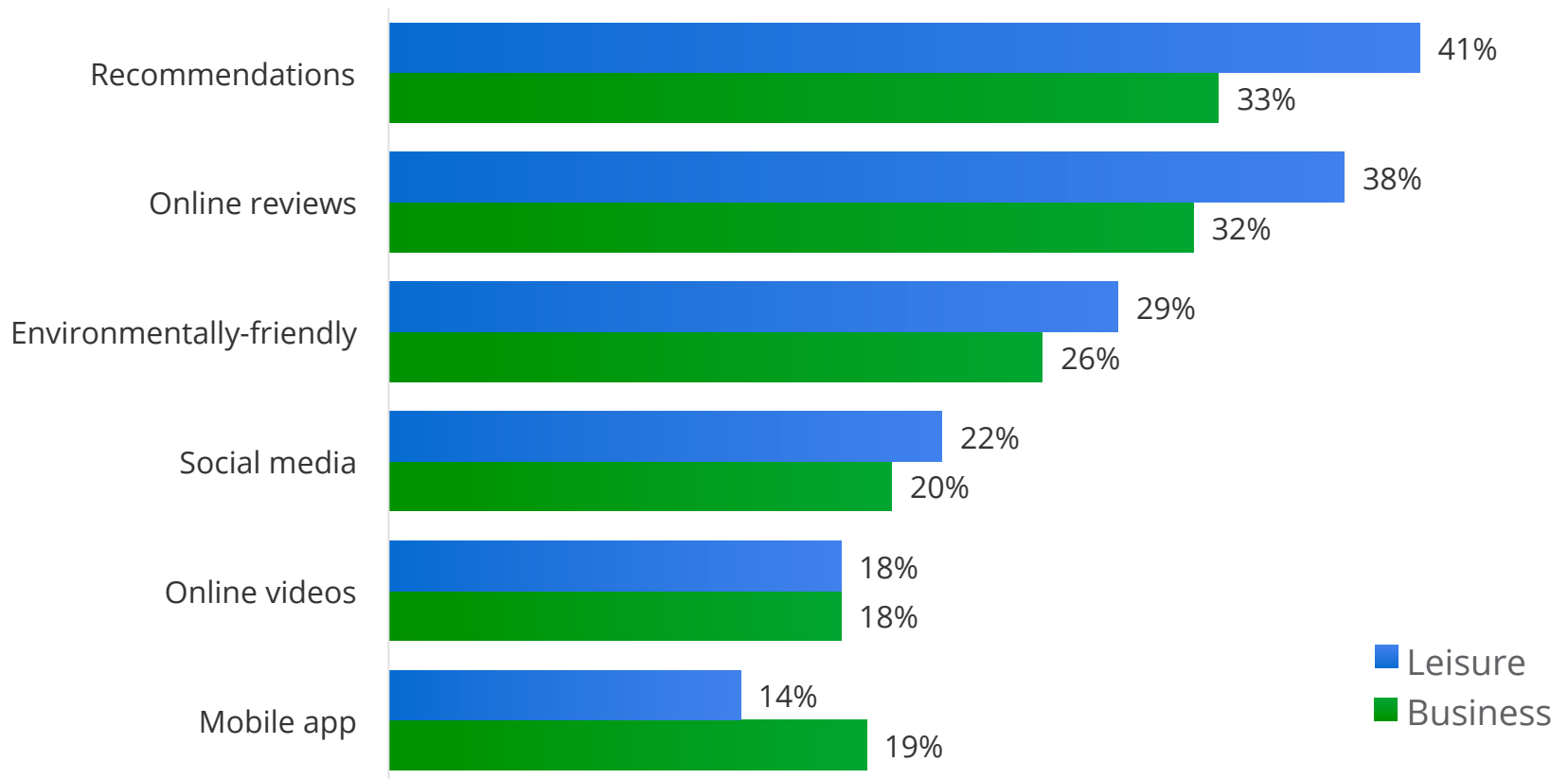
Business travelers are less price sensitive, but value promotions when choosing rental cars

Top 3 most important features when choosing a rental car



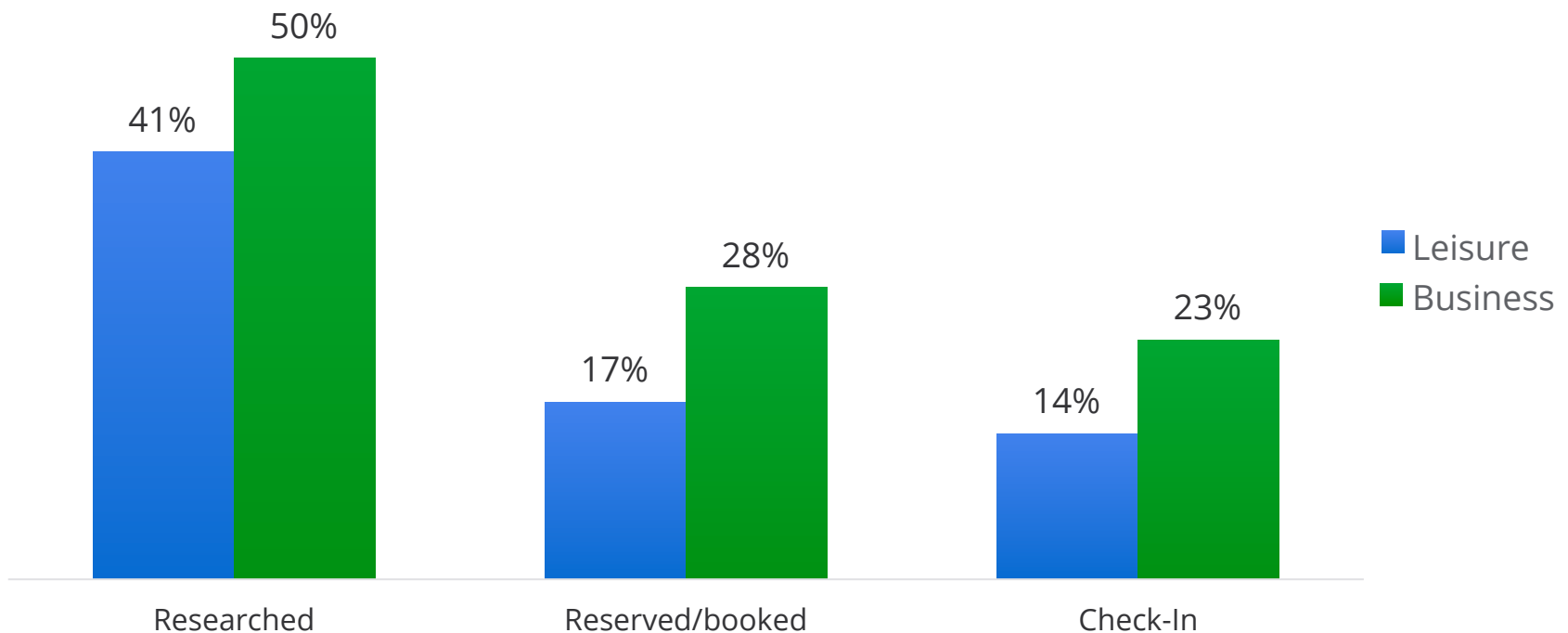
Social, mobile and environmental factors important to renters when choosing a car

Features car renters consider important when choosing a car rental



Business travelers are significantly more likely to use mobile for all stages of booking a car rental

Mobile device usage for car rentals



Business travelers significantly more likely to book on mobile apps than leisure travelers

Mobile platform used to reserve/book rental car

