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Traveler's Road to Decision: Car Rentals

Google/OTX
U.S., July 2009

Research Methodology

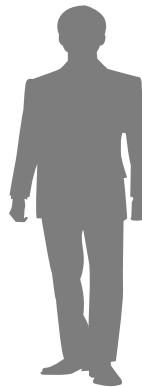
- Category covered: Car Rental
- Survey of 5,002 consumers who have traveled at least once for personal/business purposes in the past six months
- An augment of 1,500 affluent personal travelers was also recruited
- Partnered with OTX; interviews conducted 4/10 – 4/27

TRAVELER TYPES DEFINED



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



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Business Traveler
has taken at least one trip for business in the past 6 months



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Affluent Traveler
has taken at least one trip for leisure in the past 6 months and has a household income of \$150K+

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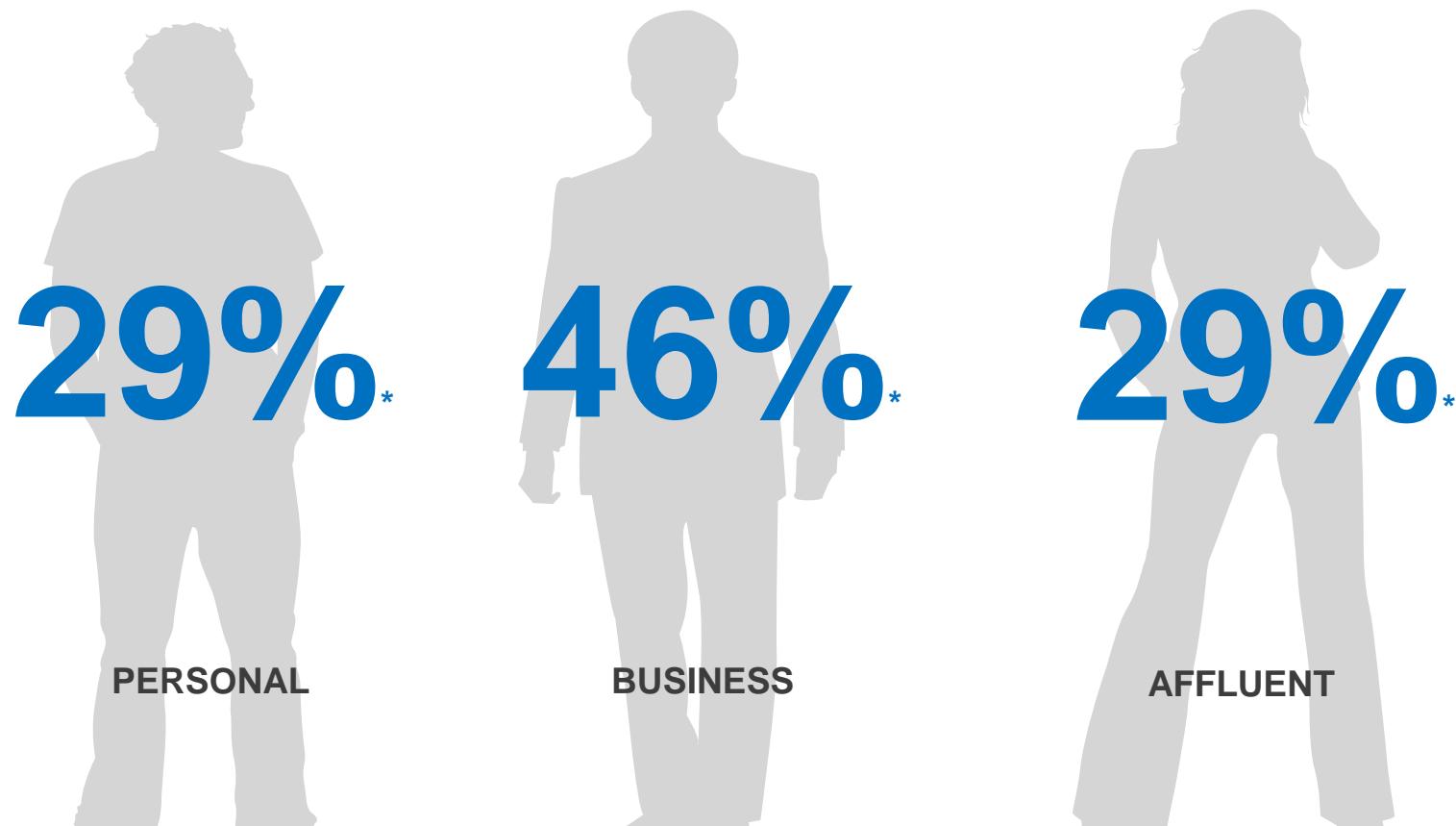
Source: Google & OTX, The Traveler's Road to Decision; June 2009

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Key Findings

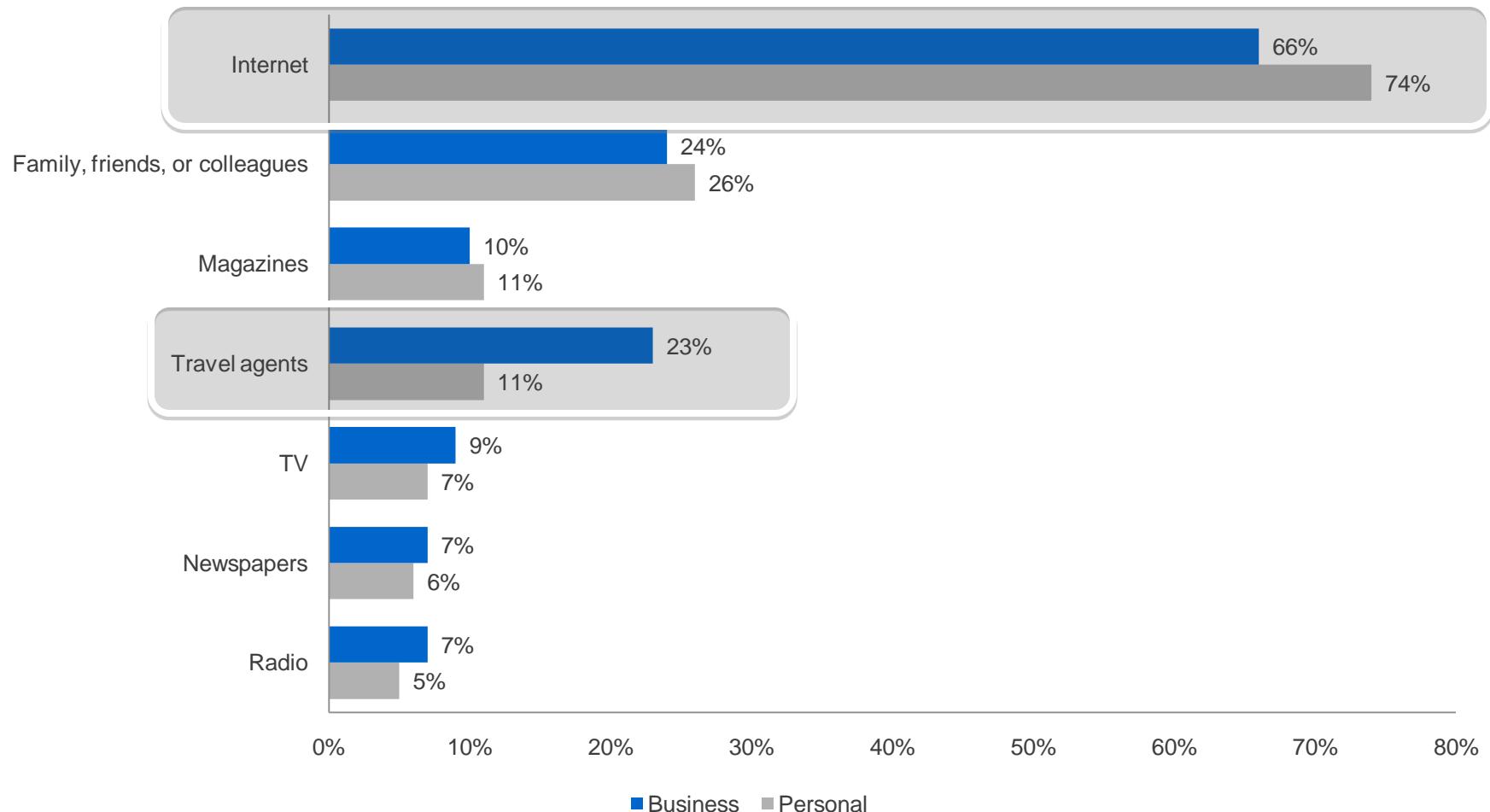
- 1 Business travelers are the heaviest car renters – nearly half rent a vehicle when they have to drive for travel
- 2 The Internet is the most widely used source for making car rental decisions
- 3 Google is used to comparison shop by almost one third of business and personal car renters and one in four affluent renters
- 4 Online is the preferred booking method across all segments
- 5 The car rental company website is the primary place where actual booking are made
- 6 Price, past experience and promotions are the most important factors to those who rent cars

Business Travelers Rent Cars More Often than Personal Travelers & Affluents

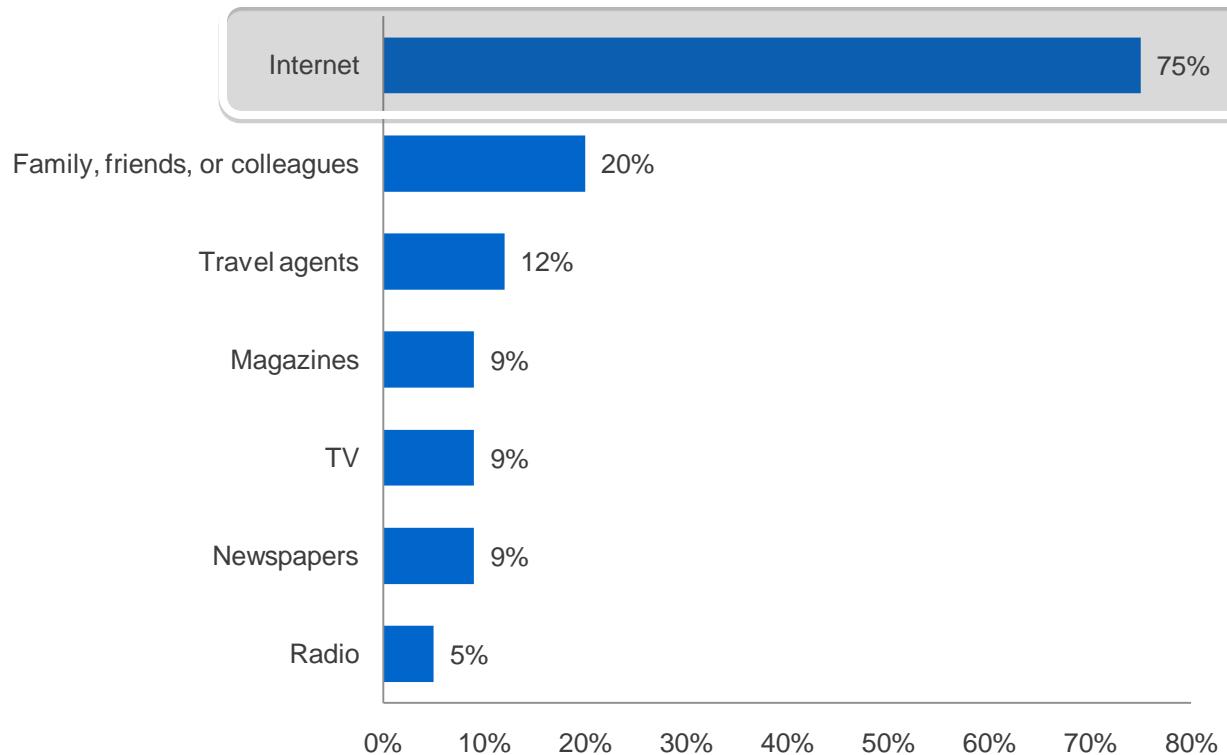


When you drive to a travel destination, how often do you rent a car rather than driving one that you/someone in your household owns?

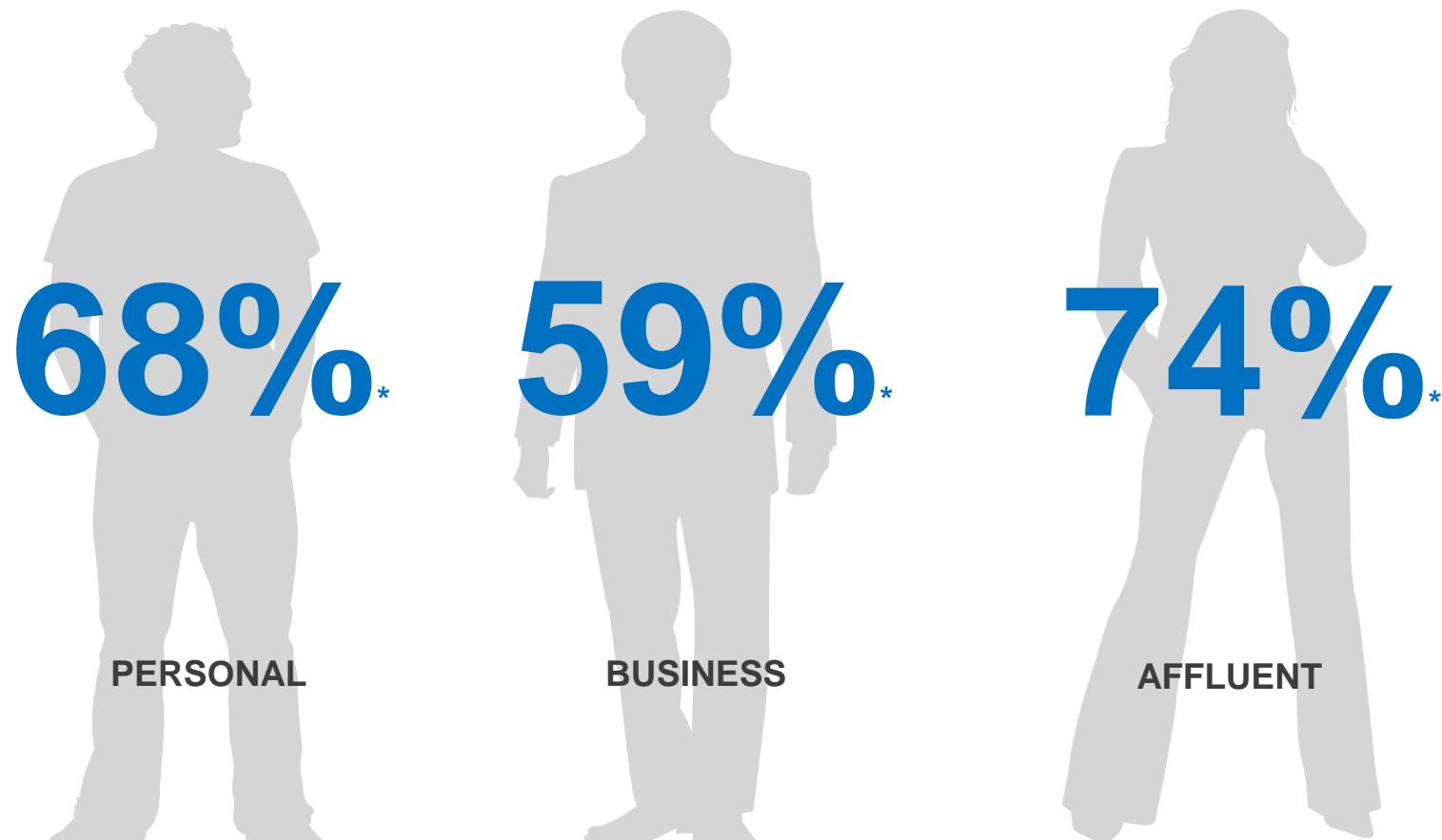
The Internet is the #1 Source Used to Make a Car Rental Decision Among Both Business & Personal Travelers



Affluents are Even More Likely to Use the Internet to Help Them Make a Decision

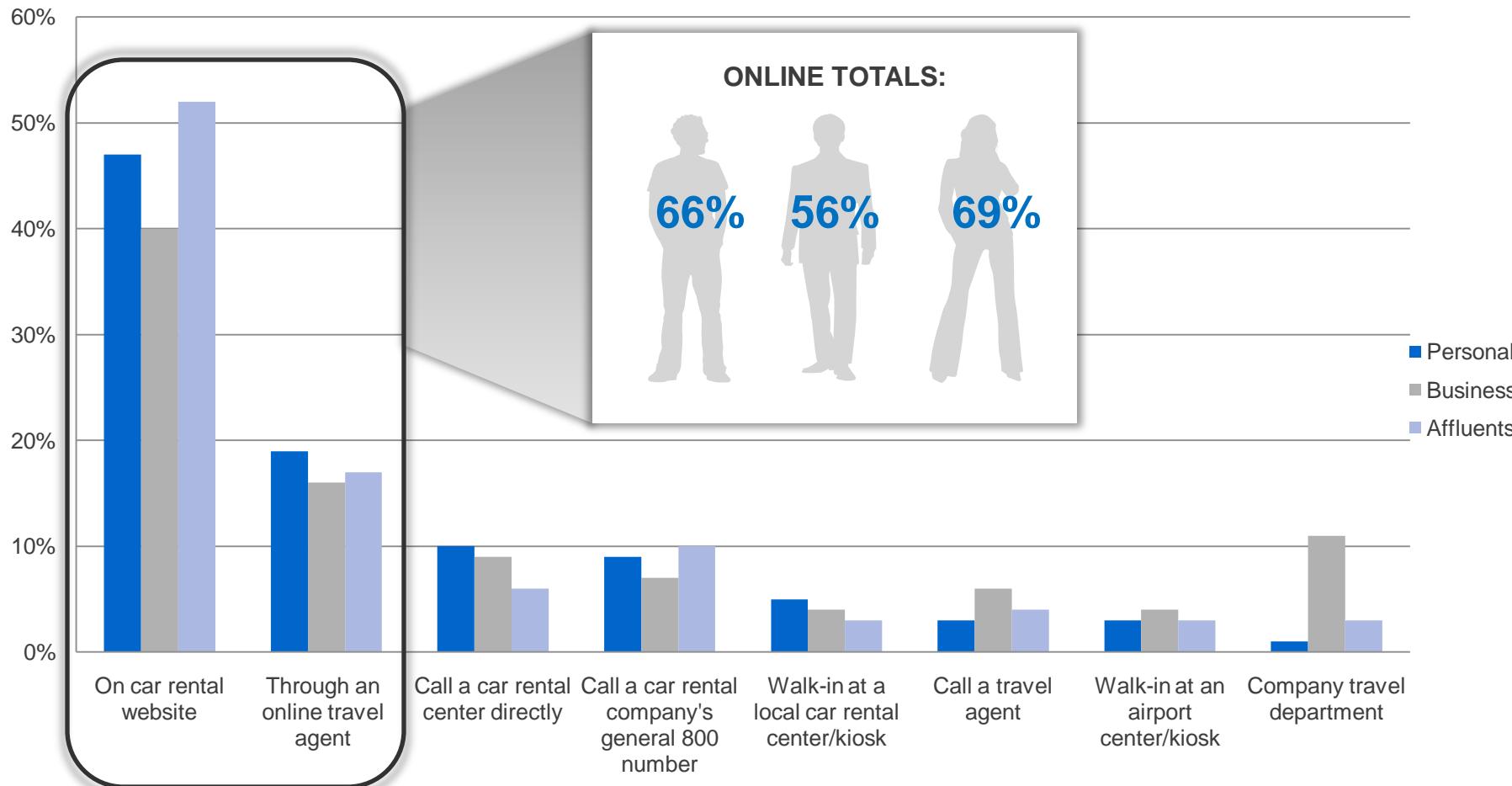


The Majority of Consumers Go Online to Comparison Shop Before Booking



Surprisingly, Affluents are the Most Likely Segment to Do Car Rental Comparison Shopping Online Before they Book

When it Comes to Booking, Online is the Preferred Method Across All Segments



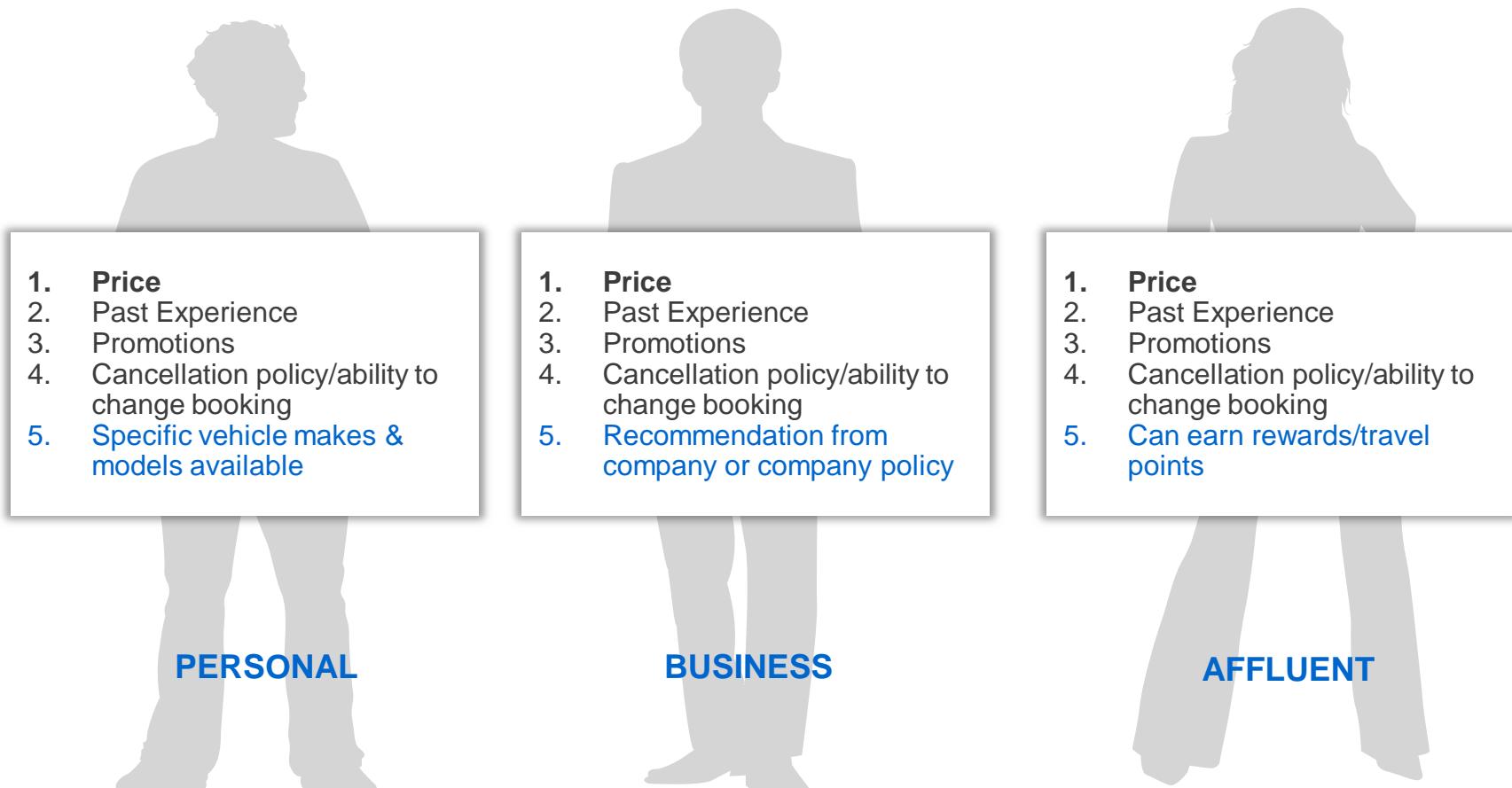
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(QR2) How do you typically reserve rental cars for a personal/business trip?
(n= 1202 Personal; n= 914 Business; n=831 Affluent)

Source: Google & OTX, The Traveler's Road to Decision; June 2009

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What's the Most Important Factor When Choosing Where to Rent?



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