

Holiday Car Hire - UK - May 2012

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"If there was any doubt that an increasing focus on older holidaymakers is necessary for the major car hire brands, it is these adults who are the most likely of any age group to say that they are 'happy to use a smaller, local car hire company'."

– Tom Rees, Senior Travel and Tourism Analyst

In this report we answer the key questions:

- What does the shift towards short-haul holiday destinations mean for operators?
- Can car hire companies benefit from the rising market share of package holidays?
- How can operators reassure those car hirers who are concerned their requirements will not be met?
- How can operators harness current and developing in-car technology to boost overseas car hiring?
- How should car hire companies respond to changing UK population dynamics?

The holiday car hire market has contracted each year since 2009, reflecting not only a continuing drop in the number of overseas holidays taken by UK residents (down from a 2008 peak of 45.5 million to 36.3 million in 2011) but also an increase in package holidays' share of the market, further eroding the core independent traveller base for holiday car hire. Mintel's exclusive consumer research reveals that since July 2010, the number of people who report having hired a car abroad in the last three years has fallen significantly.

Despite this difficult trading environment, however, there are some grounds for optimism, especially as long-haul travel has reduced in favour of European holidays. In addition opportunities exist in appealing to those segments of the population forecast to increase over the next five years (and to become more influential in the overall holiday market).

This report examines consumer attitudes towards holiday car hire and why non-hirers do not get behind the wheel. It investigates what operators can do to stand out, the core market factors and looks at the key players in the industry, future opportunities and what demographic trends mean for the sector.

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