

# CarTrawler Car Rental Market Monitor: Vol. 3 2025

Strong Summer Travel, AI Trip Planning, Winter/Holiday Outlook

## ■ A Resilient 2025 Summer Travel Season

Despite predictions of uncertainty and potential softening demand, the global car rental market proved remarkably resilient during the summer travel period (Jun-Sep).

International arrivals to the U.S. declined as anticipated, but domestic traffic more than made up the shortfall.

As a result, car rental bookings in North America showed positive year-over-year growth during the peak summer period. Europe experienced steady demand, led by the top Iberian destinations of Mallorca, Malaga, and Alicante.

86%

of YTD North American rentals booked by U.S. residents

### Top 10 US Pickup Destination – Winter 2025 Outlook

From 15 Nov 2025 – 15 Jan 2026

- 1 San Francisco, CA
- 2 Orlando, FL
- 3 Kahului, HI
- 4 Honolulu, HI
- 5 Phoenix, AZ
- 6 Denver, CO
- 7 Kona, HI
- 8 Las Vegas, NV
- 9 Lihue, HI
- 10 Tampa, FL

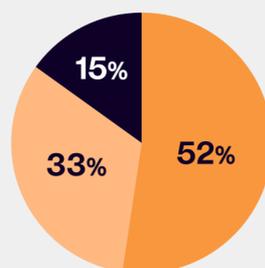
## ■ Winter/Holiday Travel Outlook

Car rental booking volumes in the November-January period typically lag the peak summer travel season but are projected to remain strong this year in both Europe and the U.S., where nearly two-thirds of Americans plan to travel this holiday season, up from about half in 2024. Like last year, U.S. travelers are heading to sunny climates with California, Florida, Hawaii, and Arizona among the top 10 destinations.

## ■ Gen AI's Role in Travel Planning

CarTrawler recently surveyed more than 1,000 U.S. travelers who have previously used AI for trip planning, uncovering generally positive attitudes toward AI tools and optimism that the technology can help them save time, effort, and money. We expect AI to become more integrated into the car rental booking process, assisting travelers in identifying optimal pricing and providing tailored recommendations.

### Brand Influence on Trust in AI for Travel

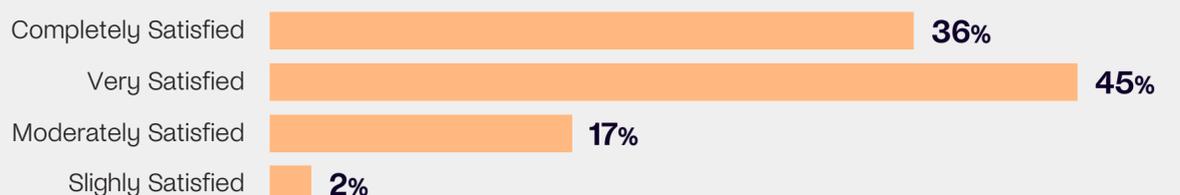


- I am more likely to use an AI travel booking tool if it is provided by a travel brand I already trust
- My trust in a travel brand has no effect on whether I will use an AI travel booking tool
- I am less likely to use an AI travel booking tool if it is provided by a travel brand I already trust

## ■ Loyalty Programs Shine as Distribution Channels

Car rental bookings associated with loyalty programs continue to surge in North America, demonstrating that loyalty is a critical distribution channel and highlighting the opportunity for programs to integrate car rentals into their earning and redemption options—an opportunity we project to be worth an estimated \$20 billion.

### How satisfied are you with the travel recommendations or options you've received from an AI tool?



For more insights into current car rental demand and mobility trends, read our **Car Rental Market Monitor: Vol. 3 2025**. The snapshots from previous volumes are available here: **Car Rental Market Monitor: Vol. 1 2025**, **Car Rental Market Monitor: Vol. 2 2025**. To learn more about CarTrawler and stay updated on industry trends, visit [www.cartrawler.com](http://www.cartrawler.com).

#### About CarTrawler

CarTrawler powers car rental and mobility solutions for many of the world's leading travel brands and loyalty programs, creating connected travel experiences through the most comprehensive network of car rental suppliers worldwide. Our Connect Platform scales to meet shifting consumer and traveller demand, giving airlines, OTAs, and loyalty programs the flexibility to offer trusted, reliable mobility services anywhere at any time. Handling over 1 billion passengers and bookings annually—nearly a quarter of the world's car rental market—CarTrawler is a leader in the global travel industry.

#### Data Sources Analysis

Except where otherwise noted, the data presented in this Car Rental Market Monitor reflects car rental activity from CarTrawler's extensive travel partners and supply partners. While representing a focused segment of the global car rental market, the findings have been analysed and extrapolated to offer CarTrawler's interpretation of broader industry trends and the direction of the wider market.