

2005 U.S. Car Rental Market^{††}

Fleet, Locations and Revenue by Market Segments

| Company | U.S. Cars in Service (Avg.) 2005 | # U.S. Locations | U.S. Rental Revenue (M) | | Market Segmentation | | | |
|------------------------------------|-------------------------------------|---------------------|----------------------------|------------------|--------------------------------|------------------------------------|-------------------------------------|---|
| | | | 2005 (est.) | 2004 | Number of Airport Locations | Percent of Airport Transactions | Number of Local/Market Locations | Percent of Local/Market Transactions |
| * Enterprise Rent-A-Car | 592,426 | 5,719 | \$6.4B | \$5.83B | 320 | 9% | 5,399 | 91% |
| ** Hertz | 315,000 | N/A | \$3.87B | \$3.5B | N/A | 75% | N/A | 25% |
| ** Vanguard Car Rental USA | 209,400 | 626 | \$1.93B | \$1.84B | N/A | N/A | N/A | N/A |
| ** Avis Rent A CarSystem Inc. | 200,000 | 1,111 | \$2.45B | \$2.28B | 342 | N/A | 769 | N/A |
| ** Budget Rent A Car | 105,000 | 773 | \$1.22B | \$1.13B | 226 | N/A | 521 | N/A |
| ** Dollar Rent A Car | 75,000 | 260 | \$979.9M | \$1,009M | 120 | 90% | N/A | 10% |
| ** Thrifty Inc. | 65,000 | 426 | \$693.4M | \$679M | 85 | 66% | 341 | 34% |
| Advantage Rent-A-Car | 15,000 | 132 | \$150M | \$139M | 32 | 60% | 100 | 40% |
| U-Save Auto Rental of America Inc. | 14,000 | 359 | \$95M | \$90M | 24 | 5% | 335 | 95% |
| Rent-A-Wreck | 8,100 | 271 | \$66M | \$78M | 0 | 0% | 271 | 100% |
| ACE Rent A Car | 12,500 | 90 | \$101M | \$92M | 69 | 85% | 20 | 15% |
| Payless Car Rental System Inc. | 10,000 | 43 | \$90M | \$80M | 55 | 90% | 14 | 10% |
| Triangle Rent-A-Car | 4,800 | 25 | \$41M | \$37M | 0 | 0% | 25 | 100% |
| Priceless Rent-A-Car | 2,150 | 81 | \$19M | \$21M | 2 | 3% | 79 | 97% |
| Affordable/Sensible | 5,170 | 246 | \$35.42M | \$33.12M | 5 | 5% | 241 | 95% |
| Fox Rent A Car | 6,200 | 39 | \$40M | \$50M | 39 | 100% | 0 | 0% |
| [†] Independents (3,000) | 74,300 | 7,200 | \$732.5M | \$750M | N/A | N/A | N/A | N/A |
| TOTALS | 1,714,046 | 17,401 | \$18,913M | \$17,638M | | | | |

Statistics based on company-provided data, public documents, industry research and ARN estimates.

Revenue comes from car rental operations only, including ancillary counter sales. Revenue represents the entire system, including corporate and franchise revenue (for those companies with franchises).

*Enterprise fiscal year ends July 31.

**ARN estimates.

[†] Estimate based on available U.S. Census Bureau figures and adjustments for recent closures and consolidation.

^{††} Correction from chart published in the ARN 2006 Fact Book. Enterprise and Industry fleet totals updated.



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