

## 2010 U.S. CAR RENTAL MARKET FLEET, LOCATIONS, AND REVENUE

COMPANY	U.S. CARS IN SERVICE (AVG.) 2010	# U.S. LOCATIONS	2010 U.S. REVENUE EST. (in millions)	2009 U.S. REVENUE (in millions)
Enterprise Holdings (Includes Alamo Rent A Car, Enterprise Rent-A-Car, National Car Rental)	850,689	6,187	\$9,800	\$9,500
Hertz (Includes Advantage Rent-A-Car)	290,000 <sup>3</sup>	2,300 <sup>3</sup>	\$4,158 <sup>3</sup>	\$3,950 <sup>3</sup>
Avis Budget Group	270,000	2,100	\$3,850 <sup>3</sup>	\$4,000
Dollar Thrifty Automotive Group	108,000 <sup>3</sup>	464 <sup>3</sup>	\$1,540 <sup>3</sup>	\$1,467 <sup>3</sup>
U-Save Auto Rental System Inc.	10,950	350	\$102 <sup>3</sup>	\$98 <sup>3</sup>
Fox Rent A Car <sup>1</sup>	9,500	13	\$140	\$105
Payless Car Rental System Inc.	9,500	35	\$110	\$100
ACE Rent A Car	9,000	95	\$100	\$95
Zipcar	7,000 <sup>3</sup>	94 <sup>3,5</sup>	\$143 <sup>3</sup>	\$125 <sup>3</sup>
Rent-A-Wreck of America	4,833	179	\$34	\$32
Triangle Rent-A-Car <sup>2</sup>	4,000	27	\$40	\$38
Affordable/Sensible	3,589	179	\$34 <sup>3</sup>	\$32.5 <sup>3</sup>
Independents <sup>4</sup>	52,500 <sup>3</sup>	5,100 <sup>3</sup>	\$500 <sup>3</sup>	\$502 <sup>3</sup>
<b>TOTAL</b>	<b>1,629,561</b>	<b>17,254</b>	<b>\$20.551B</b>	<b>\$20.045B</b>

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

Revenue comes from U.S. car rental operations only. Fleet, location and revenue numbers represent entire U.S. operations, including franchises.

<sup>1</sup> Does not include affiliate operations.

<sup>2</sup> Fleet and U.S. locations are solely corporate owned. No franchise operations.

<sup>3</sup> ARN estimates.

<sup>4</sup> Independents estimates based on available U.S. Census Bureau figures and adjustments for recent closures and consolidation.

<sup>5</sup> Areas of coverage

Alamo Rent A Car, Enterprise Rent-A-Car and National Car Rental are part of Enterprise Holdings, which ended its fiscal year July 31, 2010.

# ●●● [U.S. CAR RENTAL MARKET] MARKET DATA ●●●

THE CAR RENTAL INDUSTRY REPLACED AGING FLEETS WHILE REGAINING REVENUE LOST IN THE RECESSION.

