

Louisville Regional Airport Authority
Rental Car Concessions
Market Share
Fiscal Year 2025

	<u>Alamo</u>	<u>Avis</u>	<u>Budget/Payless</u>	<u>Dollar/Thrifty</u>	<u>Enterprise</u>	<u>Hertz</u>	<u>National</u>	<u>Total</u>	<u>Prior Year</u>
July-24	716,859.61	1,311,789.08	1,294,109.41	889,421.92	1,853,686.79	1,625,231.27	1,591,650.46	9,282,748.54	8,841,586.32
% of Total	7.72	14.13	13.94	9.58	19.97	17.51	17.15	100.00	
August-24	494,973.73	1,021,839.99	711,442.14	898,707.27	1,456,978.58	1,401,914.20	1,606,271.00	7,592,126.91	7,280,403.46
% of Total	6.52	13.46	9.37	11.84	19.19	18.47	21.16	100.00	
September-24	405,859.10	1,017,188.00	764,751.70	711,881.53	1,451,666.20	1,207,833.70	1,484,276.64	7,043,456.87	7,663,696.44
% of Total	5.76	14.44	10.86	10.11	20.61	17.15	21.07	100.00	
October-24	533,558.88	1,227,321.32	1,395,928.05	657,116.76	2,024,085.68	1,348,699.12	1,707,895.71	8,894,605.52	8,794,798.08
% of Total	6.00	13.80	15.69	7.39	22.76	15.16	19.20	100.00	
November-24	334,145.39	936,400.10	976,626.61	535,061.22	1,306,717.26	1,235,348.49	1,333,882.13	6,658,181.20	6,910,821.74
% of Total	5.02	14.06	14.67	8.04	19.63	18.55	20.03	100.00	
December-24	309,662.88	880,486.52	665,927.43	502,643.57	1,175,231.08	1,039,832.56	1,302,069.55	5,875,853.59	5,806,117.92
% of Total	5.27	14.98	11.33	8.55	20.00	17.70	22.16	100.00	
January-25	174,190.11	667,675.55	494,160.17	392,613.07	893,355.69	835,715.49	1,117,864.45	4,575,574.53	4,539,940.33
% of Total	3.81	14.59	10.80	8.58	19.52	18.26	24.43	100.00	
February-25	148,318.31	736,804.55	559,663.16	391,221.39	895,619.27	945,980.72	1,262,028.10	4,939,635.50	5,228,992.48
% of Total	3.00	14.92	11.33	7.92	18.13	19.15	25.55	100.00	
March-25	274,887.68	1,023,611.88	841,907.78	434,209.16	1,285,317.89	1,164,192.69	1,479,398.17	6,503,525.25	6,556,923.43
% of Total	4.23	15.74	12.95	6.68	19.76	17.90	22.75	100.00	
April-25	338,791.77	1,117,489.01	966,833.53	485,717.74	1,481,842.92	1,254,668.42	1,536,608.78	7,181,952.17	7,629,990.78
% of Total	4.72	15.56	13.46	6.76	20.63	17.47	21.40	100.00	
May-25	483,930.13	1,268,510.59	1,244,618.01	484,695.19	1,636,519.58	1,597,255.17	1,701,083.17	8,416,611.84	9,677,203.03
% of Total	5.75	15.07	14.79	5.76	19.44	18.98	20.21	100.00	
June-25	470,190.47	1,191,380.78	1,192,257.42	667,949.25	1,858,043.07	1,469,657.62	1,555,995.07	8,405,473.68	7,941,371.76
% of Total	5.59	14.17	14.18	7.95	22.11	17.48	18.51	100.00	
YTD (\$)	\$ 4,685,368.06	\$ 12,400,497.37	\$ 11,108,225.41	\$ 7,051,238.07	\$ 17,319,064.01	\$ 15,126,329.45	\$ 17,679,023.23	\$ 85,369,745.60	\$ 86,871,845.77
% of Total	5.49	14.53	13.01	8.26	20.29	17.72	20.71	100.00	

Louisville Regional Airport Authority
Rental Car Concessions
Transaction Count
Fiscal Year 2025

	<u>Alamo</u>	<u>Avis</u>	<u>Budget/Payless</u>	<u>Dollar/Thrifty</u>	<u>Enterprise</u>	<u>Hertz</u>	<u>National</u>	<u>Total</u>	<u>Prior Year</u>
July-24	1,881	4,205	3,711	2,645	4,858	5,216	6,225	28,741	27,386
% of Total	6.54	14.63	12.91	9.20	16.90	18.15	21.66	100.00	
August-24	1,493	3,844	2,286	3,536	4,753	5,019	7,020	27,951	26,705
% of Total	5.34	13.75	8.18	12.65	17.00	17.96	25.12	100.00	
September-24	1,398	4,015	2,873	2,988	4,931	5,466	6,544	28,215	28,300
% of Total	4.95	14.23	10.18	10.59	17.48	19.37	23.19	100.00	
October-24	1,806	4,667	4,513	2,228	6,341	4,690	7,555	31,800	30,513
% of Total	5.68	14.68	14.19	7.01	19.94	14.75	23.76	100.00	
November-24	1,180	3,529	3,342	1,962	4,520	4,771	5,989	25,293	25,671
% of Total	4.67	13.95	13.21	7.76	17.87	18.86	23.68	100.00	
December-24	1,047	3,274	2,483	2,009	3,751	3,863	5,417	21,844	22,082
% of Total	4.79	14.99	11.37	9.20	17.17	17.68	24.80	100.00	
January-25	578	2,569	1,712	1,668	2,964	3,476	5,021	17,988	18,816
% of Total	3.21	14.28	9.52	9.27	16.48	19.32	27.91	100.00	
February-25	540	2,977	2,118	1,587	3,346	4,164	5,483	20,215	21,869
% of Total	2.67	14.73	10.48	7.85	16.55	20.60	27.12	100.00	
March-25	948	3,912	3,205	1,731	4,275	4,971	5,982	25,024	25,284
% of Total	3.79	15.63	12.81	6.92	17.08	19.86	23.91	100.00	
April-25	1,123	4,040	3,350	1,758	4,442	4,700	6,464	25,877	27,148
% of Total	4.34	15.61	12.95	6.79	17.17	18.16	24.98	100.00	
May-25	1,648	4,399	4,218	1,705	5,132	5,797	6,935	29,834	32,202
% of Total	5.52	14.74	14.14	5.72	17.20	19.43	23.25	100.00	
June-25	1,319	4,201	3,644	2,232	4,805	5,060	6,239	27,500	27,320
% of Total	4.80	15.28	13.25	8.12	17.47	18.40	22.69	100.00	
YTD	14,961	45,632	37,455	26,049	54,118	57,193	74,874	310,282	313,296
% of Total	4.82	14.71	12.07	8.40	17.44	18.43	24.13	100.00	

Louisville Regional Airport Authority
Rental Car Concessions
Revenue per Transaction
Fiscal Year 2025

	<u>Alamo</u>	<u>Avis</u>	<u>Budget/Payless</u>	<u>Dollar/Thrifty</u>	<u>Enterprise</u>	<u>Hertz</u>	<u>National</u>	<u>Total</u>	<u>Prior Year</u>
July-24	381.11	311.96	348.72	336.27	381.57	311.59	255.69	322.98	322.85
August-24	331.53	265.83	311.22	254.16	306.54	279.32	228.81	271.62	272.62
September-24	290.31	253.35	266.19	238.25	294.40	220.97	226.81	249.64	270.80
October-24	295.44	262.98	309.31	294.94	319.21	287.57	226.06	279.70	288.23
November-24	283.17	265.34	292.23	272.71	289.10	258.93	222.72	263.24	269.21
December-24	295.76	268.93	268.19	250.20	313.31	269.18	240.37	268.99	262.93
January-25	301.37	259.90	288.64	235.38	301.40	240.42	222.64	254.37	241.28
February-25	274.66	247.50	264.24	246.52	267.67	227.18	230.17	244.35	239.11
March-25	289.97	261.66	262.69	250.84	300.66	234.20	247.31	259.89	259.33
April-25	301.68	276.61	288.61	276.29	333.60	266.95	237.72	277.54	281.05
May-25	293.65	288.36	295.07	284.28	318.89	275.53	245.29	282.11	300.52
June-25	356.47	283.59	327.18	299.26	386.69	290.45	249.40	305.65	290.68
YTD	313.17	271.75	296.58	270.69	320.02	264.48	236.12	275.14	277.28

Louisville Regional Airport Authority
Rental Car Concessions
Market Share Report
Fiscal Year 2025

	Alamo			Avis			Budget/Payless			Dollar/Thrifty		
	<u>2024</u>	<u>2025</u>	<u>% Change</u>	<u>2024</u>	<u>2025</u>	<u>% Change</u>	<u>2024</u>	<u>2025</u>	<u>% Change</u>	<u>2024</u>	<u>2025</u>	<u>% Change</u>
July	469,105	716,860	52.81%	1,225,448	1,311,789	7.05%	1,488,047	1,294,109	-13.03%	990,647	889,422	-10.22%
August	345,542	494,974	43.25%	1,023,834	1,021,840	-0.19%	951,785	711,442	-25.25%	781,104	898,707	15.06%
September	393,241	405,859	3.21%	1,188,358	1,017,188	-14.40%	1,158,674	764,752	-34.00%	650,921	711,882	9.37%
October	632,468	533,559	-15.64%	1,265,728	1,227,321	-3.03%	1,638,333	1,395,928	-14.80%	683,482	657,117	-3.86%
November	400,077	334,145	-16.48%	999,705	936,400	-6.33%	1,065,955	976,627	-8.38%	716,361	535,061	-25.31%
December	263,595	309,663	17.48%	826,342	880,487	6.55%	758,552	665,927	-12.21%	668,646	502,644	-24.83%
January	222,466	174,190	-21.70%	667,262	667,676	0.06%	476,715	494,160	3.66%	474,727	392,613	-17.30%
February	173,738	148,318	-14.63%	778,863	736,805	-5.40%	620,748	559,663	-9.84%	498,506	391,221	-21.52%
March	316,345	274,888	-13.11%	935,525	1,023,612	9.42%	988,462	841,908	-14.83%	529,807	434,209	-18.04%
April	494,695	338,792	-31.52%	1,058,985	1,117,489	5.52%	1,033,987	966,834	-6.49%	668,940	485,718	-27.39%
May	592,686	483,930	-18.35%	1,519,553	1,268,511	-16.52%	1,345,752	1,244,618	-7.52%	714,418	484,695	-32.16%
June	580,499	470,190	-19.00%	1,039,356	1,191,381	14.63%	1,014,753	1,192,257	17.49%	800,786	667,949	-16.59%
Totals	4,884,457	4,685,368	-4.08%	12,528,959	12,400,497	-1.03%	12,541,763	11,108,225	-11.43%	8,178,345	7,051,238	-13.78%

	Enterprise			Hertz			National			Totals		
	<u>2024</u>	<u>2025</u>	<u>% Change</u>	<u>2024</u>	<u>2025</u>	<u>% Change</u>	<u>2024</u>	<u>2025</u>	<u>% Change</u>	<u>2024</u>	<u>2025</u>	<u>% Change</u>
July	1,756,137	1,853,687	5.55%	1,400,309	1,625,231	16.06%	1,511,893	1,591,650	5.28%	8,841,586	9,282,749	4.99%
August	1,382,389	1,456,979	5.40%	1,256,970	1,401,914	11.53%	1,538,780	1,606,271	4.39%	7,280,404	7,592,127	4.28%
September	1,393,759	1,451,666	4.15%	1,270,962	1,207,834	-4.97%	1,607,783	1,484,277	-7.68%	7,663,698	7,043,457	-8.09%
October	1,639,761	2,024,086	23.44%	1,261,350	1,348,699	6.93%	1,673,675	1,707,896	2.04%	8,794,797	8,894,606	1.13%
November	1,413,374	1,306,717	-7.55%	968,426	1,235,348	27.56%	1,346,924	1,333,882	-0.97%	6,910,822	6,658,181	-3.66%
December	1,164,056	1,175,231	0.96%	857,436	1,039,833	21.27%	1,267,491	1,302,070	2.73%	5,806,118	5,875,854	1.20%
January	1,000,464	893,356	-10.71%	673,903	835,715	24.01%	1,024,404	1,117,864	9.12%	4,539,941	4,575,575	0.78%
February	1,090,700	895,619	-17.89%	826,712	945,981	14.43%	1,239,725	1,262,028	1.80%	5,228,992	4,939,636	-5.53%
March	1,370,709	1,285,318	-6.23%	959,355	1,164,193	21.35%	1,456,721	1,479,398	1.56%	6,556,924	6,503,525	-0.81%
April	1,636,385	1,481,843	-9.44%	1,264,311	1,254,668	-0.76%	1,472,687	1,536,609	4.34%	7,629,990	7,181,952	-5.87%
May	1,892,092	1,636,520	-13.51%	1,614,836	1,597,255	-1.09%	1,997,866	1,701,083	-14.85%	9,677,203	8,416,612	-13.03%
June	1,632,526	1,858,043	13.81%	1,325,666	1,469,658	10.86%	1,547,786	1,555,995	0.53%	7,941,372	8,405,474	5.84%
Totals	17,372,352	17,319,064	-0.31%	13,680,236	15,126,329	10.57%	17,685,735	17,679,023	-0.04%	86,871,847	85,369,746	-1.73%

Louisville Regional Airport Authority
Rental Car Concessions
Deplanements & Market Share
Fiscal Year 2025

	Deplanements			Market Share	
	2024	2025			
July	227,884	232,795	2.16%	Alamo	5.49%
August	184,998	192,309	3.95%	Avis	14.53%
September	206,905	200,228	-3.23%	Budget/Payless	13.01%
October	239,388	230,160	-3.85%	Dollar/Thrifty	8.26%
November	193,309	182,683	-5.50%	Enterprise	20.29%
December	180,191	173,533	-3.69%	Hertz	17.72%
January	160,269	144,863	-9.61%	National	20.71%
February	166,789	151,683	-9.06%		
March	199,121	185,408	-6.89%	Totals	100.00%
April	212,866	194,164	-8.79%		
May	232,076	211,387	-8.91%		
June	230,738	223,229	-3.25%		
Totals	2,434,534	2,322,442	-4.60%		

