

Accommodating Peer-to-Peer Carsharing at Airports

1PM (Eastern Time)

December 17, 2025

TRB Webinar based on ACRP Research Report 274:
Accommodating Peer-to-Peer Carsharing at Airports: A Guide.

Today's Learning Objectives

At the end of this webinar, participants will be able to:

- **Determine the financial impacts of implementing P2P carsharing at an airport,**
- **Understand common requirements for P2P carsharing companies as part of airport business agreements, and**
- **Establish a framework for determining the facility needs of P2P operations at your airport.**

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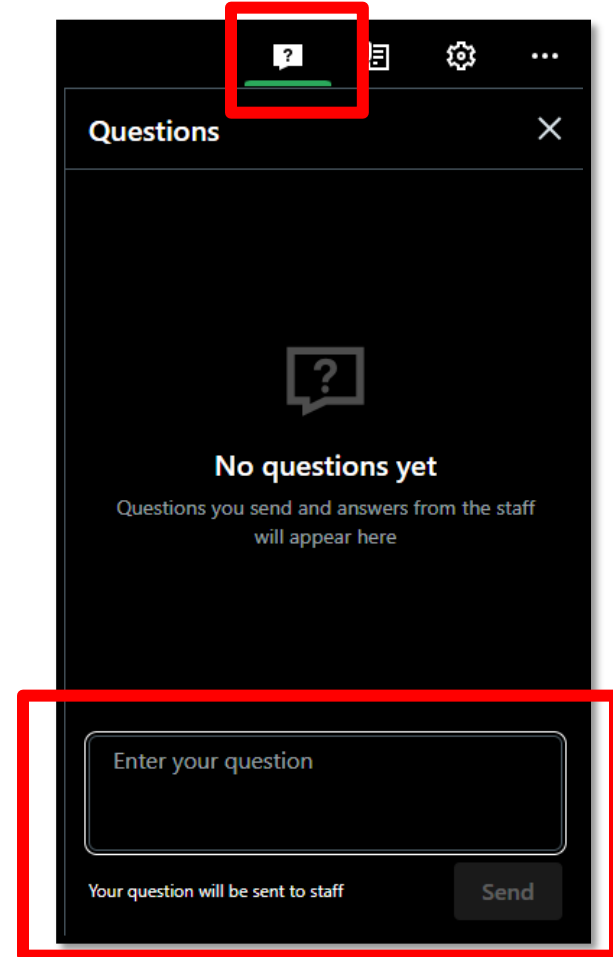
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Questions and Answers

Please type your questions into
your webinar control panel

We will read your questions out
loud, and answer as many as
time allows

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The screenshot shows a mobile application interface for a webinar Q&A session. At the top, there is a navigation bar with a question icon (a speech bubble with a question mark) highlighted by a red box. Below the navigation bar, the title "Questions" is displayed. The main content area shows a large question mark icon and the text "No questions yet" followed by "Questions you send and answers from the staff will appear here". At the bottom, there is a text input field with the placeholder "Enter your question" and a "Send" button, both highlighted by a red box. Below the input field, it says "Your question will be sent to staff".

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Accommodating Peer-to-Peer Carsharing at Airports

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What is P2P Carsharing

P2P Carsharing:

- Allows customers to reserve, pick-up and return a personally owned vehicle, for a fee

P2P Carsharing Business:

- Maintain web-enabled apps making it possible for vehicle owners (hosts) and customers to broker transactions and exchange vehicles
- Offer insurance and support



Source: Turo.com

What is P2P Carsharing (continued)

P2P Carsharing Hosts

- Owner of vehicles
- Hosts, not carsharing business, responsible for maintaining vehicles
- Small number of hosts account for a large percentage of cars rented (some owning >8 vehicles)

P2P Carsharing Customers

- Limited information
- Increasingly popular especially among younger consumers and those on personal/vacation trips



Source: Getaround.com

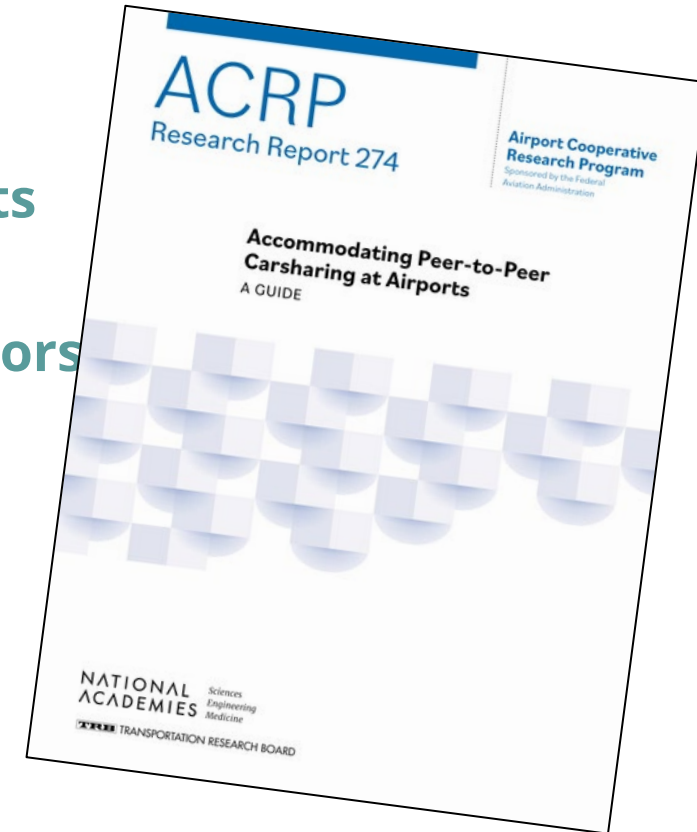
Background/Research Objectives

- ➔ **Objective:** Help airport staff understand, accommodate, and manage Peer-to-Peer (P2P) carsharing services
- ➔ **Background:** Significant evolution in carsharing since RFP was issued:

| | Before 2021 | 2025 |
|---------------------------------------|------------------------|---|
| P2P carsharing businesses at airports | Turo, Avail and others | Turo |
| Availability of P2P at airports | <20 airports | >100 airports |
| Airports with P2P business agreements | Few, if any | Most all airports |
| Locations of P2P vehicle exchanges | Curbsides | Major airports--parking; Smaller airports--curbsides |
| Airport fees | Varied | % of gross revenues |

Contents of Report 274

1. Introduction and Quick Start Guide
2. What is Carsharing
3. Other Forms of Commercial GT Commonly Found at Airports
4. Profile of P2P Carsharing at Airports
5. Financial Implications of P2P Carsharing for Airport Operators
6. State Regulation of P2P Carsharing
7. Airport Regulation of P2P Carsharing
8. Rental Car Operations at Airports
9. Overview of Business Agreements with P2P Companies
10. Providing for P2P Carsharing at Airports



Comparison with Traditional Rental Cars (RACs)

| Function | Traditional RAC | P2P Carsharing |
|--|-------------------------------|--|
| Vehicle ownership and maintenance | The rental car business | Host, not the P2P carsharing business |
| Provide site on/near airport (for storage and maintenance) | Needed for airport operations | Not needed, hosts store and maintain elsewhere |
| Vehicle inspection before renting to customer | RAC employee | Host, not the P2P carsharing business |
| Transport customers to exchange site | RAC business, if remote site | If needed, others, not P2P the carsharing business |

2023 P2P Carsharing Market Shares at Selected Airports

- ➔ About 10 to 15% of all O-D passengers rent a car at most airports. Varies based on trip purpose, proximity of major destinations, proportion of local O-D passengers
- ➔ Of those passengers renting a car the percent using P2P carsharing:

| Airport | Market share (%) | Airport | Market share (%) |
|---------|------------------|---------|------------------|
| DEN | 5.2 | BNA | 1.5 |
| SLC | 4.5 | MSP | 1.5 |
| TPA | 2.0 | IND | 1.1 |
| SRQ | 2.7 | GSO | 0.8 |
| CLT | 2.0 | TAL | 0.6 |

Source InterVISTAS Consulting, August 2023

Factors Influencing P2P Carsharing Market Shares

- Cost savings vs. traditional rental cars
- Convenience of vehicle exchange locations
- Appeal to younger customer/leisure customers
- Availability of cars (during Covid)
- Contactless pick-up (no interaction with host)
- Promotion of EVs by some traditional RACs

Preferred P2P Carsharing Exchange Locations

1. In safe locations--minimize vehicle break-ins or theft; allows for contactless exchanges
2. Not impinge on space allocated to other businesses or needed for parking
3. In non-designated portion of parking facility at major airports. Curbside acceptable at smaller airports without congestion

Accommodating P2P Carsharing--Other considerations

1. Do not require P2P carsharing vehicles to display placard
2. Do not limit how long P2P vehicles can remain parked
3. Do not limit number of cars one host may provide
4. Monitor and audit P2P carsharing businesses
 - Self-reporting, unless match license plates and revenue reports
 - Assure reporting of all “airport related” business or exchanges occurring nearby
 - Business agreement to allow use of supporting technology, if available

State Regulation of P2P Carsharing

Legislation (as of April 2024)

- 30 jurisdictions passed some form of legislation
- 4 jurisdictions had pending legislation (subsequently 2 failed, 2 stalled)
- 17 jurisdictions had no pending legislation or legislation had failed
- Some jurisdictions regulate at airports only
- Model Act prepared by National Conference of Insurance Legislators (NCOIL)

Scope of Legislation

- Varies widely
- Insurance provisions (often taken from NCOIL Model Act)
- Taxes, administrative fees
- Consumer protection regulations

State Regulation of P2P Carsharing

Insurance Requirements

- Most state regulations include insurance provisions
- Typically mandate specific coverages for vehicle owner
- Typically include conditions for when P2P company is responsible/liable

Consumer Protection Disclosures

- Typically require disclosures re: insurance (NCOIL Model Act)
- Less common disclosures: Recalls, Fees
- Not much traction for safety disclosures

Taxation

- Contentious topic
- Patchwork: no P2P tax, taxes on P2P company (not vehicle owner), typically based on gross receipts but rate varies

Airport Regulation of P2P Carsharing

Why regulate P2P operations?

- Increases non-aeronautical revenues
 - P2Ps derive revenue from access to airports and passengers, just like other ground transportation providers, and should pay for access.
- Maintains existing rental car revenues
 - RACs are second largest source of non-aeronautical revenues
 - P2Ps compete with traditional RACs
 - Treats competitors similarly
- Addresses operational concerns
 - Space-constrained or congested airports
 - Safety
 - Avoids perceived competitive advantages

Airport Regulation of P2P Carsharing

Legal and Regulatory Strategies

- Litigation
 - Active litigation between airports and Turo in 2018-2022
 - Litigation largely settled
 - Past several years, Turo has focused on negotiating operating permits
- Operating permits: Guiding principles
 - Increase non-aeronautical revenues
 - Address operational restraints
 - Competitive fairness
 - Details will vary

Airport Regulation of P2P Carsharing

Legal and Regulatory Strategies

- Operating permits: Examples
 - RACs shuttle to ConRAC, 10% gross receipts / P2Ps shuttle to pick-up/drop-off, 10% gross receipts
 - Better access to customers = increased gross receipts (and vice versa)
 - Operations in airport parking lots
 - Open use
 - Designated areas
 - Parking fees v. Parking fees plus rental of dedicated space
 - Fees associated with use of shuttles and other common transportation
 - Tracking airport-related transactions and auditing

Overview of Business Agreements w/P2P Carsharing Companies

Table 9-1. Comparison of airport business agreements with traditional rental car and P2P carsharing companies

| Business Agreement Requirement | Type of rental car or car sharing business | | |
|--|--|-------------|-----|
| | On-airport | Off-airport | P2P |
| Pay a fee calculated as percent gross revenues, | X | X | X |
| Pay a guaranteed minimum annual guaranteed amount | X | | |
| Rent airport facilities for customer service & vehicle maintenance | X | | |
| Report monthly revenues | X | X | X |
| Provide service during all hours of schedule airline operations | X | | |
| Provide ADA-compliant vehicles | X | | |
| Offer car seats/baby seats | X | | |
| Provide for ACDBE participation | X | | |
| Offer clean, well-maintained vehicles complying with recalls | X | X | X |
| Evaluate safety of owners' vehicles and check for recalls | X | X | X |
| Have local manager available 24/7 to respond to requests | X | | |
| Train employees/hosts in operating vehicles on airport and compliance with rules | X | X | X |
| Inform customers of applicable rules and regulations | X | X | X |
| Limit locations where cars are rented and returned | X | X | X |
| Suspend employees or vehicle owners for violating airport rules, if requested | X | X | X |
| Only conduct rental car business on the airport | X | X | X |
| Apply technology to support monitoring and compliance, if requested | X | X | X |
| Ensure only authorized customers operate vehicles | X | X | X |

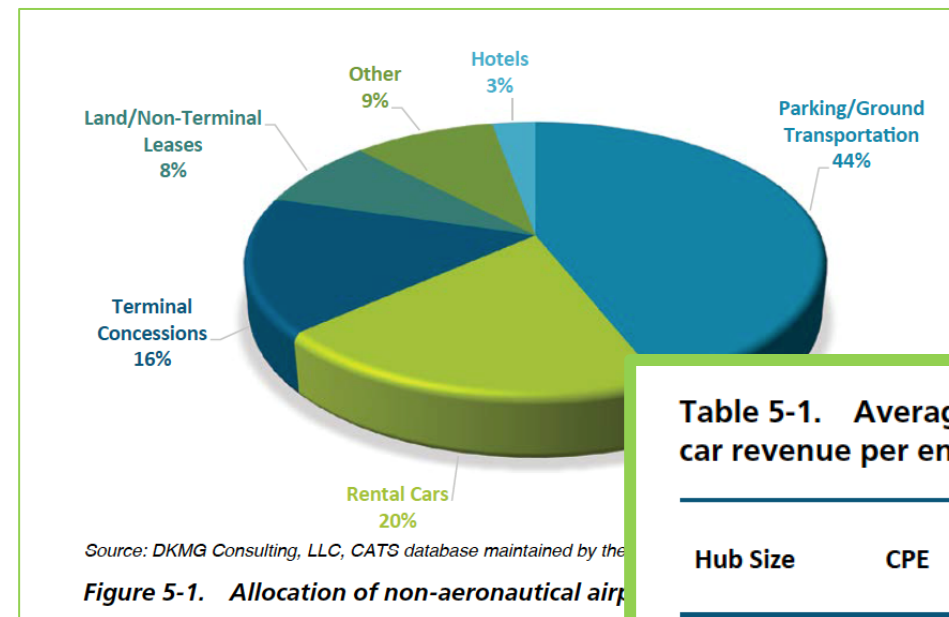


Table 5-1. Average CPE and rental car revenue per enplanement.

| Hub Size | CPE | Rental Car Revenue per Enplanement |
|----------------|---------------|------------------------------------|
| Large | \$14.45 | \$2.23 |
| Medium | \$9.65 | \$2.44 |
| Small | \$7.73 | \$4.79 |
| Non-Hub | \$7.55 | \$6.05 |
| Average | \$9.84 | \$3.88 |

Source: DKMG Consulting, LLC, CATS database maintained by the FAA, as of September 2023.

Overview of Business Agreements w/P2P Carsharing Companies

Summary of Key Requirements in P2P Carsharing Agreement

- Term
 - Most P2P Agreements have a one-year term
 - Early termination provisions upon 30- or 60-days notice
- Rights of Airport Management
 - Determine the size and location of “Designated Area” for drop-off or pickup
 - Suspend a vehicle owner for violations of Rules and Regulations
 - Ability to inspect vehicles
- Penalties – almost all P2P Agreements have penalties
 - First Offense – verbal warning to Owner
 - Second Offense – written warning and \$150 fine
 - Third Offense – suspension of Owner and fine

Overview of Business Agreements w/P2P Carsharing Companies (continued)

Airport Fees

- Revenues from parking and ground transportation are key revenue sources at airports
- Privilege or Concession Fee calculated as a percentage of gross receipts derived from company's airport operations
 - Typically – 10%
 - TLH charges 6.5% and TPA charges 8%
- Hosts and customers pay any parking fees
- File monthly report with airport required information
- Annual statement reconciling monthly reports
- Security Deposit
 - TPA requires 3 months of fees and charges
 - SRQ 3-month security deposit or \$5,000, whichever is greater

Reporting Requirements

[illegible]

Overview of Business Agreements w/P2P Carsharing Companies (continued)

Gross Revenues or Gross Receipts Definition

| Hub Size | Non-Hub | Small Hub | | Medium Hub | | |
|--|----------------|----------------|----------------|----------------|----------------|----------------|
| Airport | TLC | RIC | SRQ | IND | ONT | SJC |
| Defined Term | Gross Receipts | Gross Revenues | Gross Revenues | Gross Receipts | Gross Receipts | Gross Revenues |
| Included: | | | | | | |
| Trip fee time and mileage | | ✓ | ✓ | ✓ | ✓ | ✓ |
| Any income Permittee charges or receives | ✓ | | ✓ | | | ✓ |
| Protection plan charges | | ✓ | ✓ | ✓ | ✓ | ✓ |
| Fueling costs | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Delivery fee | ✓ | ✓ | ✓ | ✓ | ✓ | |
| Young driver fee or other add-on fees | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Any amount charged by Operator as a pass thru to Shared Vehicle Driver | ✓ | ✓ | | ✓ | | ✓ |
| Long-term bookings proceeds | ✓ | ✓ | | | ✓ | ✓ |
| No deduction for payment of certain taxes levied Operator's activities | ✓ | | ✓ | | ✓ | |
| Any charges for insurance offered incidental to the Shared Car agreement | | | | | ✓ | ✓ |
| Extra additional charges | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Excluded: | | | | | | |
| Federal, state or local taxes or surcharges | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Insurance proceeds | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Cancellation fees | ✓ | ✓ | ✓ | ✓ | ✓ | |
| Tickets/other violation charges | | ✓ | | ✓ | | ✓ |
| Fully passed thru amounts | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Certain discounts | | | | | | |
| Sale of Operator's capital assets | | | | | ✓ | ✓ |
| Non-revenue Shared Cars when used by employees of company | | | | | | |

Overview of Business Agreements w/P2P Carsharing Companies (continued)

Requirements of P2P Company

- Drop-off and pickup in “Designated Area”
- Comply with Airport Rules and Regulations
- Obey lawful commands of airport staff
- Details displayed on website
- Investigate owners who do not comply
- Provide vehicles in clean condition that are safe for operation
- Process for checking VIN for safety recalls
- No solicitation of business at the airport
- Prohibit owners from circumventing the website or allowing unauthorized driver to use vehicle

Overview of Business Agreements w/P2P Carsharing Companies (continued)

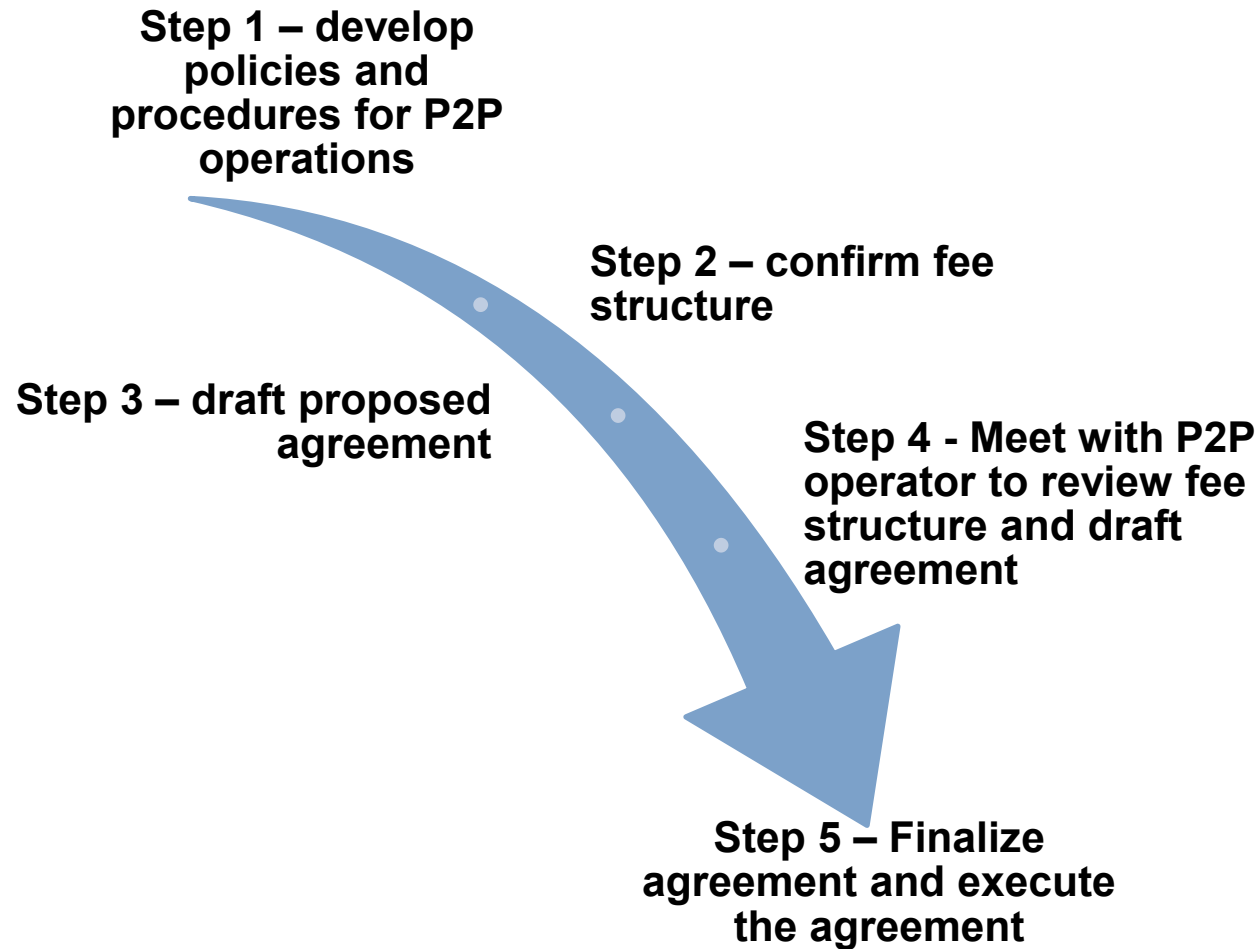
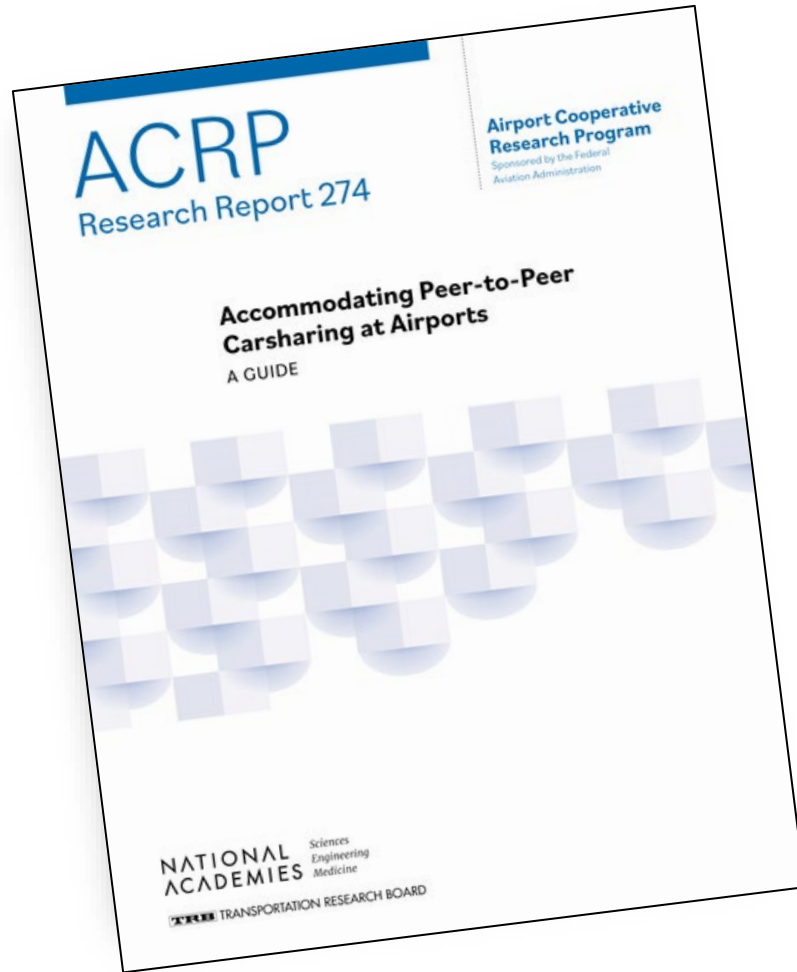


Figure 9-5. Process to develop an agreement between a P2P carsharing company and an airport operator

FOR ADDITIONAL INFORMATION



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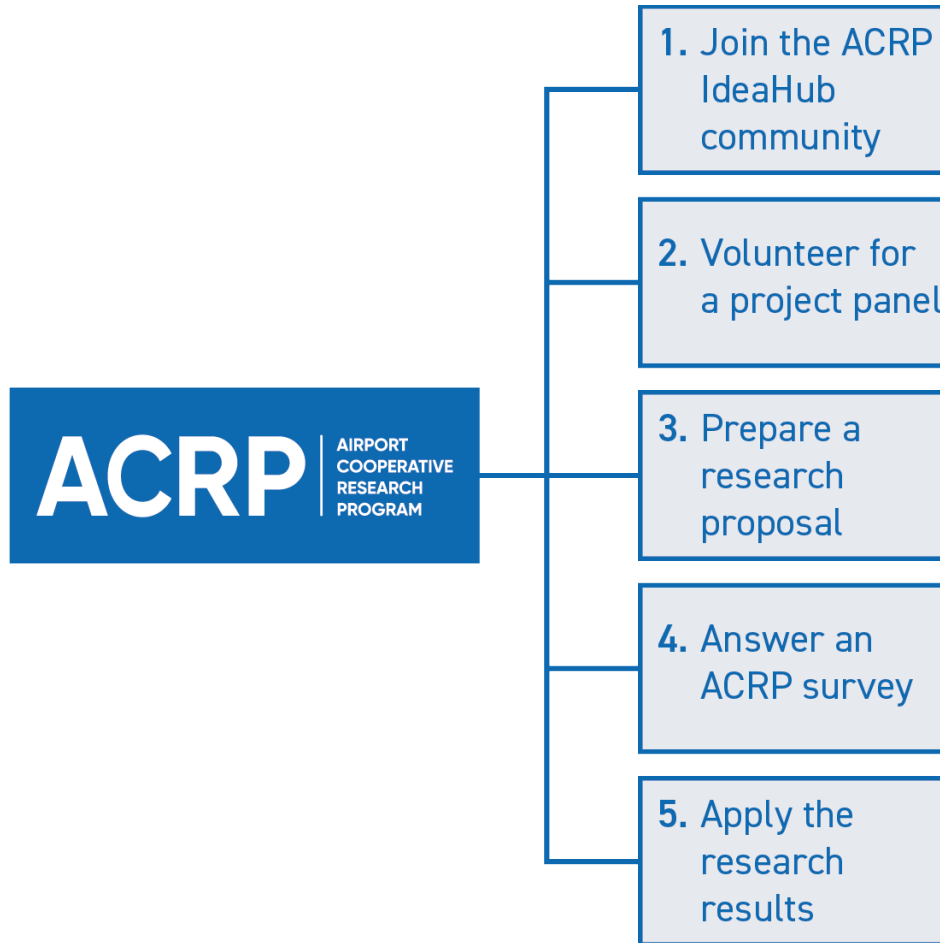
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