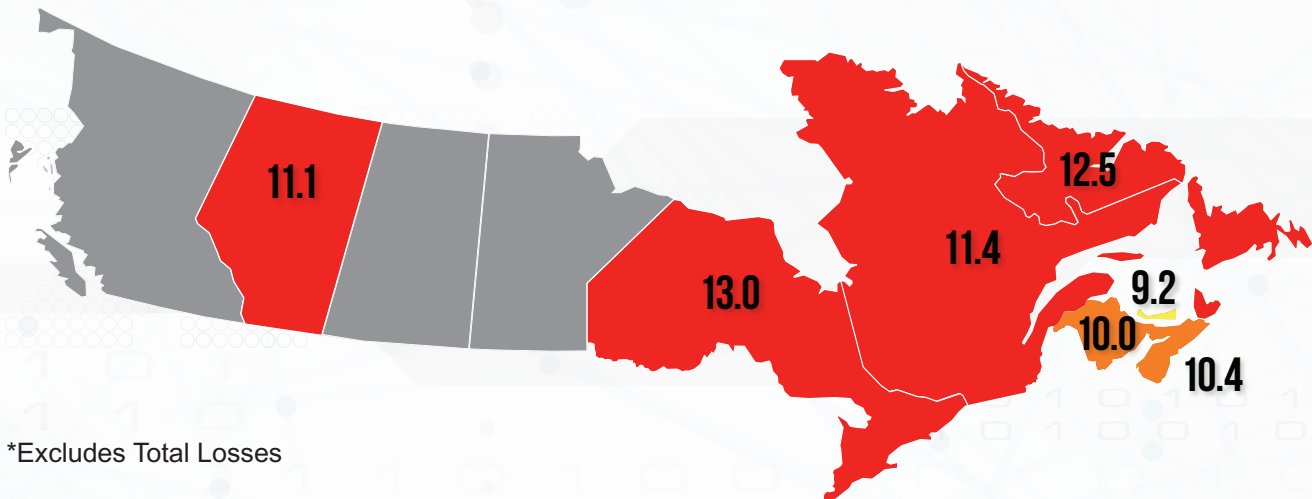
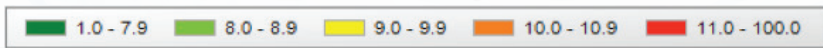


Canada Average Length of Rental by Province Q2 - 2020



*Excludes Total Losses



Average Billed Days for Canada		
Q2 2019	Q2 2020	Change
11.7	11.3	-0.4

Province Avg Billed Days for Canada			
Province	Q2 2019 LOR	Q2 2020 LOR	Change
Alberta	11.6	11.1	-0.5
Ontario	12.5	13.0	0.5
Quebec	11.0	11.4	0.4
Newfoundland and Labrador	10.4	12.5	2.1
New Brunswick	11.0	10.0	-0.1
Nova Scotia	10.8	10.4	-0.4
Prince Edward Island	8.8	9.2	0.4

Year over year change

* Source: Enterprise Rent-A-Car. Includes ARMS® Insurance Company Direct Billed Rentals; Excludes Total Loss Vehicles.

* Data excludes the private carrier provinces of BC, Manitoba and Saskatchewan.

Canada Length of Rental - Q2 2020

Nationally, Canada saw a Q2 2020 drop in LOR compared to Q2 2019 of almost a half day (0.4). Significantly, that drop includes an increase of a half day in Ontario, where we saw similarities to the U.S. trends for Q2 2020 – an April spike in LOR followed by drops in May and June, but mitigated even further by reduced claims counts.

Also of interest is Alberta, down quarterly by a half day. It will bear watching in Q3 for impacts from the mid-June storms in Calgary, especially with the observed total loss and non-drivable percentage increases.

Conclusion

As with many things these days, the 'new normal' is anything but, especially as it pertains to relying on historical trending methods, models and data. However, the collision industry is a resilient one; the ecosystem continues to adapt and find new ways to promote efficiencies and processes to support our mutual customers' post-accident experience. Horn added: "with vehicle miles traveled returning to pre-COVID levels in late June, we will be watching the effect of increased traffic volume on vehicle repair frequency and length of rental."

Everyone is getting back to life at their own speed. Whenever and wherever customers are ready to get back on the road, Enterprise is ready with clean, sanitized vehicles and a low-touch rental process.

The quarterly LOR summary is produced by Enterprise Rent-A-Car. Through its ARMS® Automotive Suite of Products, Enterprise provides collision repair facilities with free cycle time reporting with market comparisons, free text/email capability to update their customers on vehicle repair status, and online reservations. More information is available at armsautosuite.com.