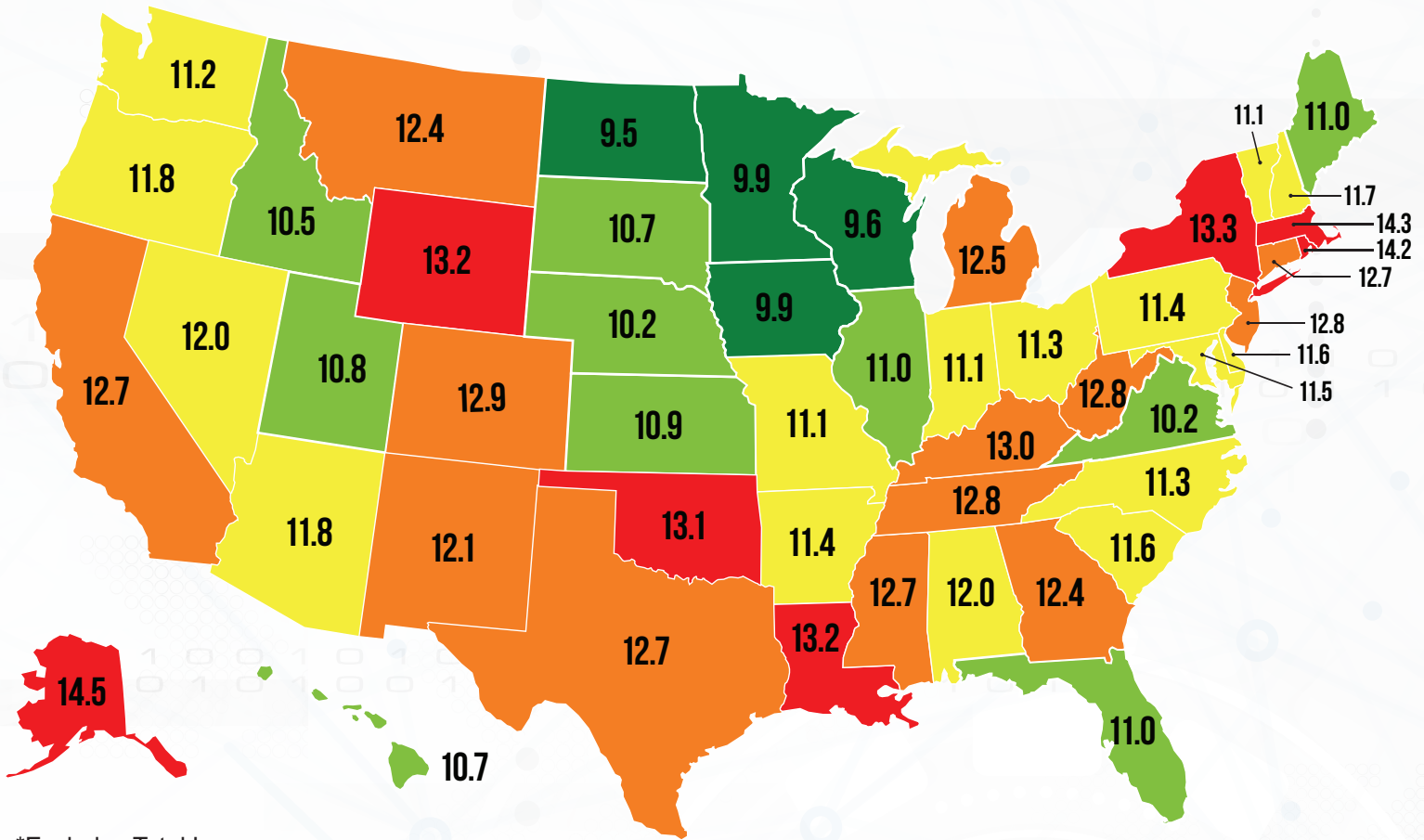
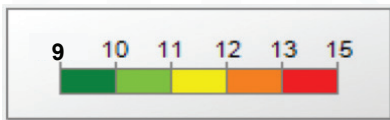


# U.S. Length of Rental

## Q2 - 2020



\*Excludes Total Losses



| Average Billed Days for US |         |        |
|----------------------------|---------|--------|
| Q2 2019                    | Q2 2020 | Change |
| 11.8                       | 12.0    | 0.2    |

| Average Billed Days for US by State |             |             |        |
|-------------------------------------|-------------|-------------|--------|
| State                               | Q2 2019 LOR | Q2 2020 LOR | Change |
| AK                                  | 12.7        | 14.5        | 1.8    |
| AL                                  | 12.1        | 12.0        | -0.1   |
| AR                                  | 11.0        | 11.4        | 0.4    |
| AZ                                  | 11.9        | 11.8        | -0.1   |
| CA                                  | 12.4        | 12.7        | 0.3    |
| CO                                  | 13.8        | 12.9        | -0.9   |
| CT                                  | 11.7        | 12.7        | 1.0    |
| DC                                  | 9.4         | 9.3         | -0.1   |
| DE                                  | 11.1        | 11.6        | 0.5    |
| FL                                  | 11.6        | 11.0        | -0.6   |
| GA                                  | 12.6        | 12.4        | -0.2   |
| HI                                  | 11.0        | 10.7        | -0.3   |
| IA                                  | 9.7         | 9.9         | 0.2    |
| ID                                  | 10.2        | 10.5        | 0.3    |
| IL                                  | 10.3        | 11.0        | 0.7    |
| IN                                  | 11.2        | 11.1        | -0.1   |
| KS                                  | 11.0        | 10.9        | -0.1   |
| KY                                  | 12.6        | 13.0        | 0.4    |

| Average Billed Days for US by State |             |             |        |
|-------------------------------------|-------------|-------------|--------|
| State                               | Q2 2019 LOR | Q2 2020 LOR | Change |
| LA                                  | 12.7        | 13.2        | 0.5    |
| MA                                  | 13.3        | 14.3        | 1.0    |
| MD                                  | 11.5        | 11.5        | 0.0    |
| ME                                  | 10.1        | 11.0        | 0.9    |
| MI                                  | 11.3        | 12.5        | 1.2    |
| MN                                  | 10.1        | 9.9         | -0.2   |
| MO                                  | 10.9        | 11.1        | 0.2    |
| MS                                  | 12.3        | 12.7        | 0.4    |
| MT                                  | 12.2        | 12.4        | 0.2    |
| NC                                  | 11.6        | 11.3        | -0.3   |
| ND                                  | 9.8         | 9.5         | -0.3   |
| NE                                  | 10.0        | 10.2        | 0.2    |
| NH                                  | 11.1        | 11.7        | 0.6    |
| NJ                                  | 11.6        | 12.8        | 1.2    |
| NM                                  | 12.1        | 12.1        | 0.0    |
| NV                                  | 12.0        | 12.0        | 0.0    |
| NY                                  | 12.8        | 13.3        | 0.5    |

| Average Billed Days for US by State |             |             |        |
|-------------------------------------|-------------|-------------|--------|
| State                               | Q2 2019 LOR | Q2 2020 LOR | Change |
| OH                                  | 11.2        | 11.3        | 0.1    |
| OK                                  | 12.1        | 13.1        | 1.0    |
| OR                                  | 11.6        | 11.8        | 0.2    |
| PA                                  | 11.0        | 11.4        | 0.4    |
| PR                                  | 15.1        | 26.8        | 11.7   |
| RI                                  | 14.6        | 14.2        | -0.4   |
| SC                                  | 11.6        | 11.6        | 0.0    |
| SD                                  | 10.8        | 10.7        | -0.1   |
| TN                                  | 12.2        | 12.8        | 0.6    |
| TX                                  | 12.6        | 12.7        | 0.1    |
| UT                                  | 10.9        | 10.8        | -0.1   |
| VA                                  | 10.5        | 10.2        | -0.3   |
| VT                                  | 9.9         | 11.1        | 1.2    |
| WA                                  | 10.9        | 11.2        | 0.3    |
| WI                                  | 9.4         | 9.6         | 0.2    |
| WV                                  | 12.7        | 12.8        | 0.1    |
| WY                                  | 12.4        | 13.2        | 0.8    |

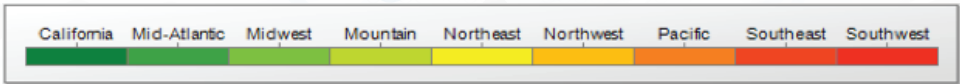
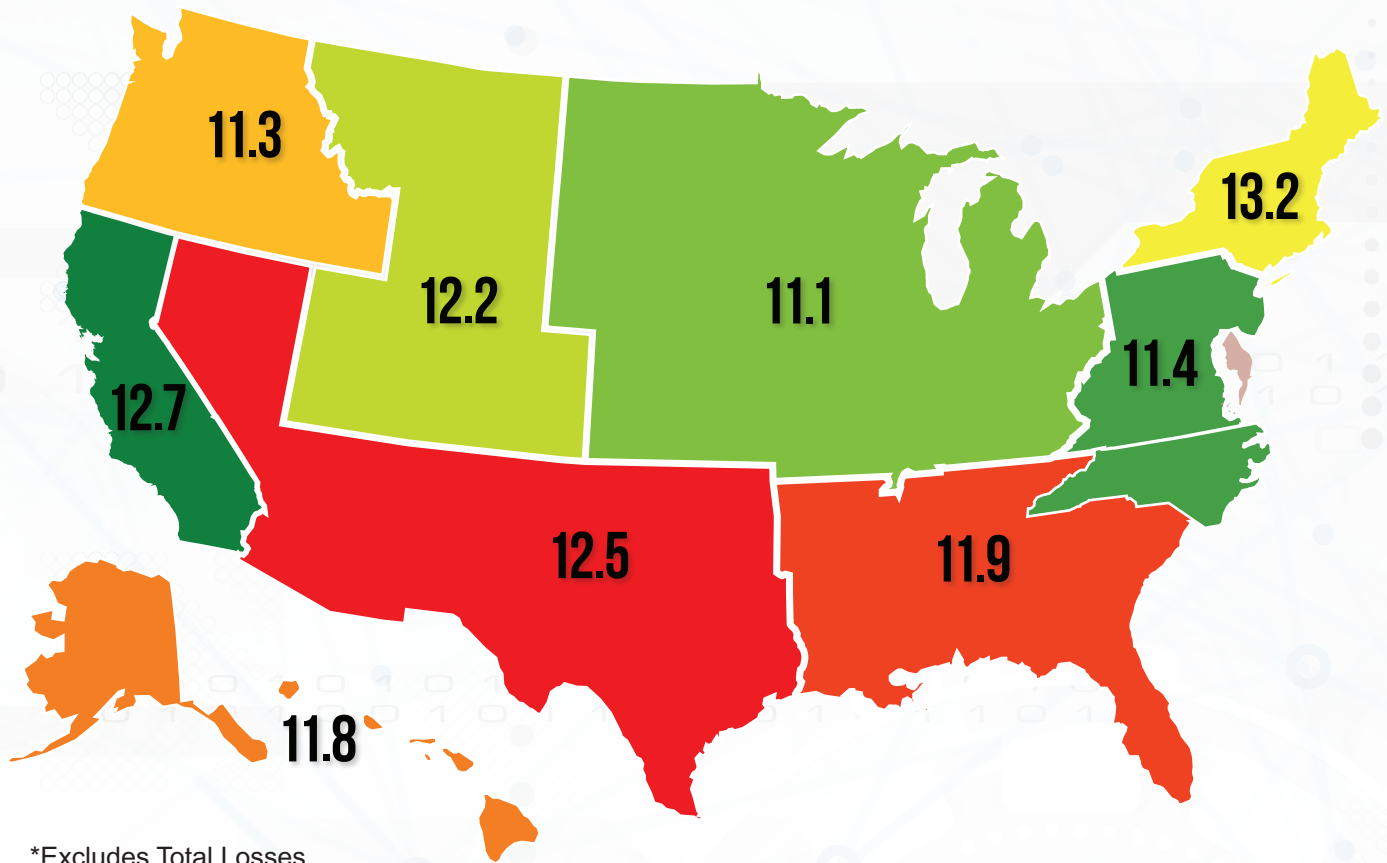
### Year over year change

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



# U.S. Average Length of Rental

## Q2 - 2020



| Average Billed Days for US |         |        |
|----------------------------|---------|--------|
| Q2 2019                    | Q2 2020 | Change |
| 11.8                       | 12.0    | 0.2    |

| Average Billed Days for US by Region |             |             |        |
|--------------------------------------|-------------|-------------|--------|
| Region                               | Q2 2019 LOR | Q2 2020 LOR | Change |
| California                           | 12.4        | 12.7        | 0.3    |
| Mid-Atlantic                         | 11.2        | 11.4        | 0.2    |
| Midwest                              | 10.8        | 11.1        | 0.3    |
| Mountain                             | 12.8        | 12.2        | -0.6   |
| Northeast                            | 12.6        | 13.2        | 0.6    |
| Northwest                            | 11.0        | 11.3        | 0.3    |
| Pacific                              | 11.3        | 11.8        | 0.5    |
| Southeast                            | 12.0        | 11.9        | -0.1   |
| Southwest                            | 12.5        | 12.5        | 0.0    |

### Year over year change

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

## U.S. Length of Rental - Q2 2020

The past three months have been interesting, to say the least, so it comes as no surprise that average Length of Rental (LOR) in the U.S. during Q2 of 2020 should follow suit.

In April, Enterprise analyzed the impacts of COVID-19 on LOR as most states saw significant increases year-over-year due to disruptions in claims and repair processes and in customers' daily lives. In May, we saw a significant decrease in LOR, both from the previous month as well as year-over-year; this could be attributed to acceptance of new processes across the industry as well as reduced claims counts. June 2020 followed May's trend with a drop of 0.6 days when compared to June 2019. From an overall Q2 perspective, the LOR decreases in May and June – while statistically significant – still weren't enough to counteract the April increases, especially with the reduced claims counts in the latter two months of the quarter. Greg Horn, PartsTrader's Chief Innovation officer added, "parts delivery times were essentially the same for May and June 2020 as they were for the same respective months in 2019."

When analyzing regional performance, the Mountain Region saw a reduction of 0.6 days in Q2 of 2020 compared to Q2 of 2019. The Southeast and Southwest Regions were relatively static. The California, Mid-Atlantic, Midwest and Northwest Regions all saw a modest increase. The Northeast and Pacific Regions saw the largest increases regionally at 0.6 and 0.5 days, respectively.

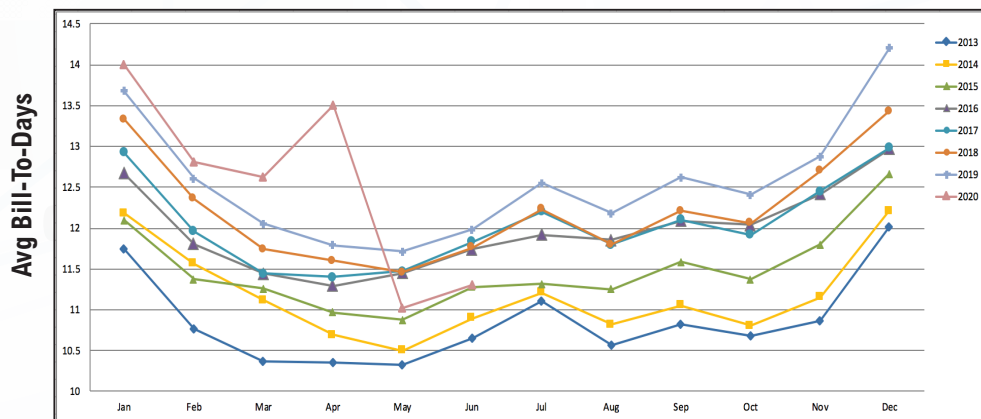
When reviewing individual states' performances, 15 states plus DC saw a LOR reduction. Four states were flat, and 31 states saw a quarterly rise. Of those with a quarterly increase, seven states (AK, CT, MA, MI, NJ, OK, VT) had an increase in LOR of a full day (1.0) or greater.

### 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.

US Industry Avg Length of Rental



\*Excludes Total Losses

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](http://armsautosuite.com).