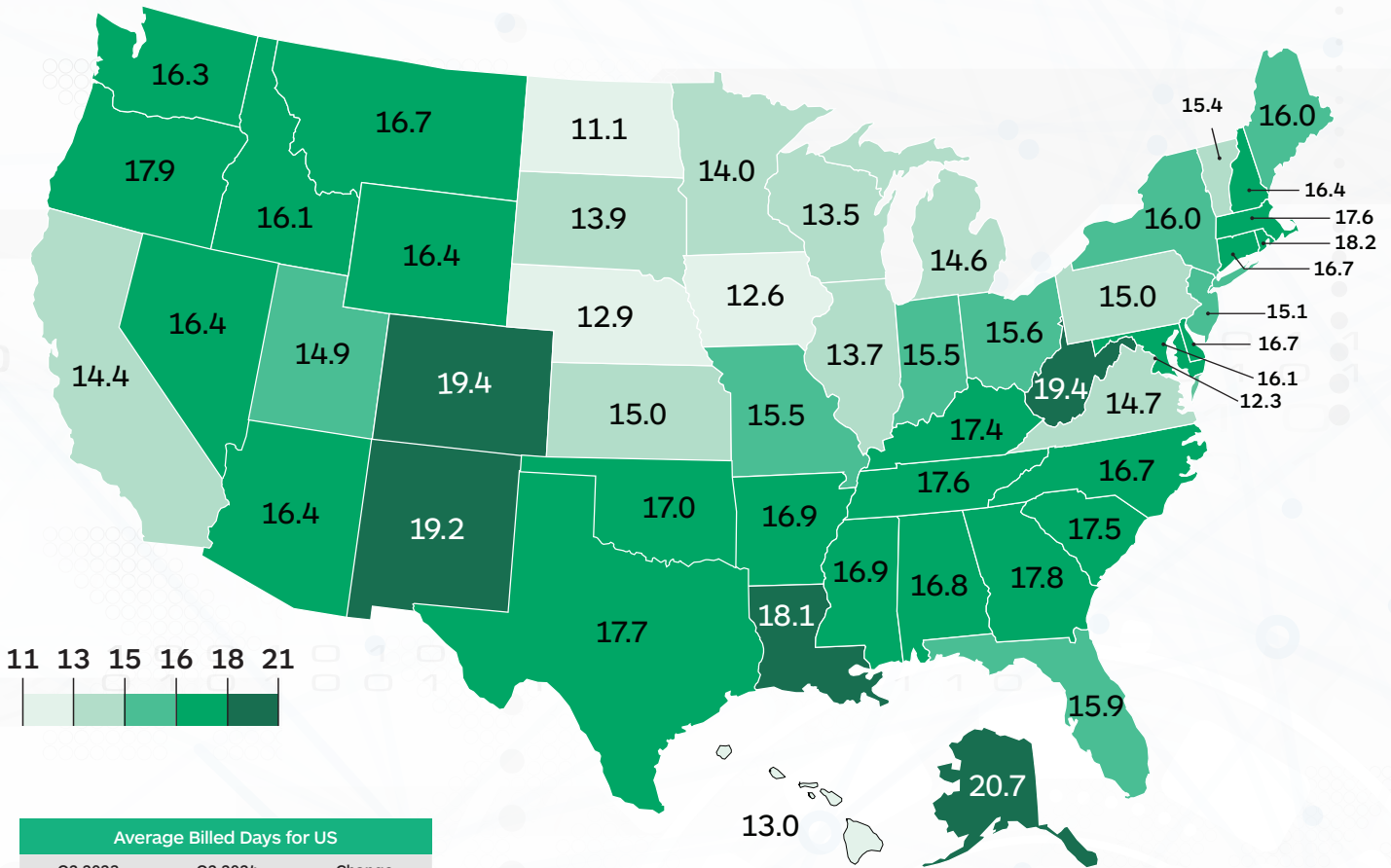


# U.S. Length of Rental by State

Q2 2024



Average Billed Days for US		
Q2 2023	Q2 2024	Change
17.4	16.0	-1.4

Average Billed Days for US by State			
State	Q2 2023	Q2 2024	Change
AK	22.7	20.7	-2.0
AL	18.5	16.8	-1.7
AR	18.4	16.9	-1.5
AZ	18.8	16.4	-2.4
CA	16.2	14.4	-1.8
CO	20.2	19.4	-0.8
CT	17.0	16.7	-0.3
DC	13.5	12.3	-1.2
DE	17.6	16.7	-0.9
FL	17.8	15.9	-1.9
GA	20.5	17.8	-2.7
HI	13.1	13.0	-0.1
IA	13.3	12.6	-0.7
ID	17.6	16.1	-1.5
IL	14.9	13.7	-1.2
IN	17.0	15.5	-1.5
KS	15.6	15.0	-0.6

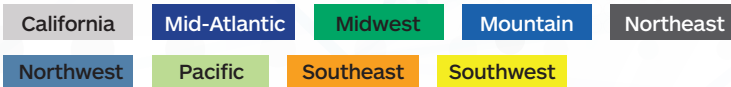
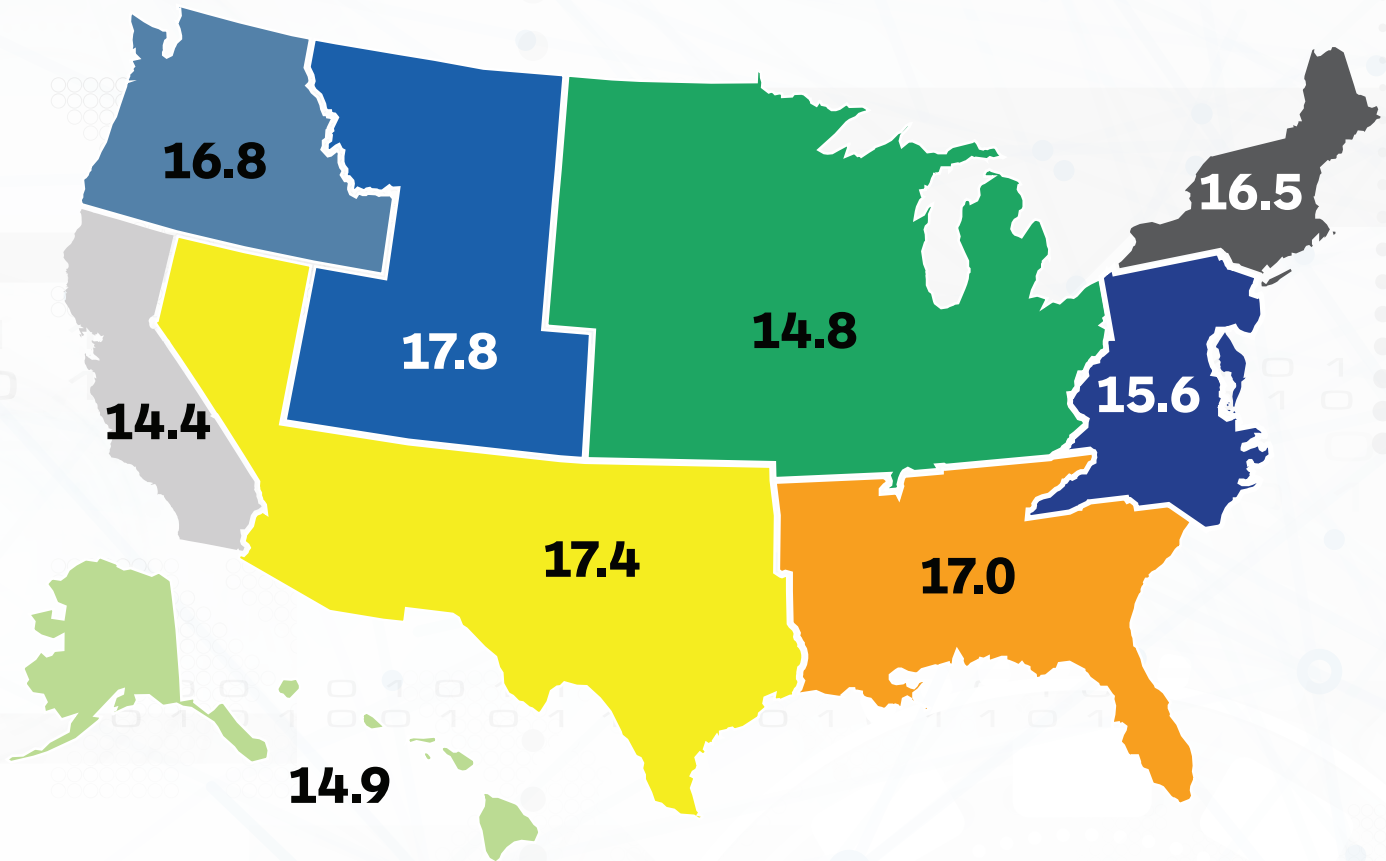
Average Billed Days for US by State			
State	Q2 2023	Q2 2024	Change
KY	19.3	17.4	-1.9
LA	20.1	18.1	-2.0
MA	18.2	17.6	-0.6
MD	17.6	16.1	-1.5
ME	16.0	16.0	0
MI	16.0	14.6	-1.4
MN	16.2	14.0	-2.2
MO	15.8	15.5	-0.3
MS	18.9	16.9	-2.0
MT	19.8	16.7	-3.1
NC	17.9	16.7	-1.2
ND	13.3	11.1	-2.2
NE	13.9	12.9	-1.0
NH	17.5	16.4	-1.1
NJ	16.0	15.1	-0.9
NM	19.5	19.2	-0.3
NV	18.0	16.4	-1.6
NY	16.5	16.0	-0.5

Average Billed Days for US by State			
State	Q2 2023	Q2 2024	Change
OH	17.2	15.6	-1.6
OK	19.3	17.0	-2.3
OR	19.4	17.9	-1.5
PA	15.8	15.0	-0.8
PR	15.5	19.2	3.7
RI	19.0	18.2	-0.8
SC	18.9	17.5	-1.4
SD	15.3	13.9	-1.4
TN	19.7	17.6	-2.1
TX	18.8	17.7	-1.1
UT	17.5	14.9	-2.6
VA	15.7	14.7	-1.0
VT	15.5	15.4	-0.1
WA	19.2	16.3	-2.9
WI	15.2	13.5	-1.7
WV	18.9	19.4	0.5
WY	17.2	16.4	-0.8

\*Source: Enterprise Rent-A-Car. Includes ARMS® Insurance Company Direct Billed Rentals.

# U.S. Average Length of Rental by Region

Q2 2024



Average Billed Days for US by Region

Region	Q2 2023	Q2 2024	Change
California	16.2	14.4	-1.8
Mid-Atlantic	16.6	15.6	-1.0
Midwest	16.1	14.8	-1.3
Mountain	19.2	17.8	-1.4
Northeast	17.0	16.5	-0.5
Northwest	19.1	16.8	-2.3
Pacific	15.4	14.9	-0.5
Southeast	19.0	17.0	-2.0
Southwest	18.8	17.4	-1.4

\*Source: Enterprise Rent-A-Car. Includes ARMS® Insurance Company Direct Billed Rentals.

# United States Overall

Overall length of rental (LOR) for collision-related rentals in Q2 2024 was 16.0 days, a 1.4-day decline from Q2 2023. Traditionally, LOR continues a decrease from Q1 into Q2, with June seeing an increase. As we observed in Q1 2024, that trend continues, though the traditional June rise did not occur in 2024.

Alaska had the highest overall LOR in Q2 2024 at 20.7 days, followed by Colorado and West Virginia, both at 19.4 days. New Mexico was right behind at 19.2 days. North Dakota had the lowest LOR at 11.1 days, with Washington, D.C. at 12.3 days and Iowa at 12.6 days.

Montana had the largest LOR drop, down 3.1 days from Q2 2023 to 16.7. Washington was close behind, recording a drop of 2.9 days to 16.3. Only West Virginia had an LOR increase in Q2 2024 compared to Q2 2023, up one-half day to 19.4 days. Maine was the only state to have flat LOR results at 16.0 days. All other states, plus D.C., saw LOR drop, with 24 states recording at least a 1.5-day decline.

We asked John Yoswick, editor of the weekly *CRASH Network* newsletter, to share any insights: “As Q2 2024 started, there was a significant decline in the average backlog of work in shops nationwide. Backlogs always drop from Q1 to Q2 each year, typically by two or three days. This year, however, backlog plummeted by nearly nine days in the second quarter – the largest decline in backlog since the 10-day drop in the second quarter of 2020 (at the start of the pandemic lockdowns). With this quarter’s drop of 8.8 days, the average scheduling backlog of 2.7 weeks is now more than three weeks shorter than the high of 5.8 weeks reached in the first quarter of 2023.”

“That said, a 2.7-week average remains higher than any quarter prior to mid-2021, and nearly double the historical second quarter average of 1.4 weeks,” Yoswick added. “Backlogs typically rise from Q2 to Q3 each year, so if the decline continues this summer, that will be surprising.”

We also reached out to Greg Horn, PartsTrader’s Chief Industry Relations Officer, to see if the year-over-year reductions align with PartsTrader’s median delivery days. Horn explained that PartsTrader uses median delivery days (plus two standard deviations) to track the delivery times and the impact of the outliers that can cause repair delays and increase length of rental. “Median delivery days for all part types decreased by 2.4 days when comparing Q2 2023 to Q2 2024, aligning with a reduction in rental days shown in Enterprise data. In looking specifically at June data, median delivery days did not show the traditional ‘June bump’, which is also in alignment with Enterprise data,” said Horn.

“We are seeing the collision parts ecosystem working well, having recovered from issues at the west coast shipping ports and the UAW strike in 2023,” Horn continued. “However, a situation to monitor is the potential of an east coast and gulf coast dock strike this year. Hopefully, a deal can be reached to avoid any work stoppages.”

Ryan Mandell, Director of Claims Performance for Mitchell International, observed: “The average first-party deductible amount continues to climb, signaling weakened consumer health and a higher likelihood of claims not being filed or insureds possibly dropping first-party coverage altogether as premiums have increased dramatically. In the U.S., the average first-party deductible rose to \$832 in Q2 2024, up from \$700 in Q2 2023. This is the largest YOY jump ever witnessed in our data.”

## Drivable

In Q2 2024, drivable LOR was 14.6 days, a 0.9-day drop from Q2 2023’s 15.5 days. While this drop seems significant, it’s also important to compare 2021 and 2022 results for additional context. In Q2 2022, LOR with rentals associated with drivable claims was 15.2 days, which was a 3.7-day increase from Q2 2021’s result of 11.5 days. So, comparing Q2 2024 to Q2 2021, drivable LOR has increased 3.1 days.



As observed in the overall numbers, Alaska had the highest drivable LOR at 18.5 days, which represents a 0.3-day decline from results in Q2 2023. Colorado had the next-highest drivable LOR at 18.0 days, a 0.4-day increase from Q2 2023.

North Dakota had the lowest LOR, dropping below the 10-day mark to 9.4 days. D.C. had the next-lowest LOR at 10.7 days, followed by Iowa at 11.3 days and Hawaii at 11.4 days.

West Virginia also recorded the highest drivable LOR increase at 16.4 days, up 1.4 days from Q2 2023. Maine, Missouri and New Mexico all had LOR increases of 0.6 days in Q2 2024. Georgia (16.8) and Utah (13.5) had the joint-largest decreases in drivable LOR, both down 1.8 days, with Washington (15.0) close behind with a 1.7-day decrease. Overall, 17 states plus D.C. had drivable LOR decreases of one full day or greater.

## Non-Drivable

Non-drivable LOR was 22.4 days in Q2 2024, a 3.2-day decrease from Q2 2023. While a significant decrease from Q2 2023's high water mark, comparing these results to Q2 2021 is also relevant. In Q2 2021, non-drivable LOR was 18.7 days, or 3.7 days lower than this quarter's results.

In Q2 2024, Alaska had the highest non-drivable LOR at 31.9 days, which in itself was a 3.5-day drop from Q2 2023. West Virginia had the next-highest LOR at 29.4 days, followed by Vermont (28.6) and New Mexico (28.4). D.C. had the lowest non-drivable LOR at 18.5 days, followed by Iowa at 19.2 and Nebraska at 19.3.

Vermont had the only non-drivable LOR increase, with their 28.6-day result representing a 2.5-day jump. Montana had the highest decrease, dropping eight full days from Q2 2023 to 28.0 days. Washington (-7.7) and North Dakota (-7.1) also experienced notable LOR drops. Twenty-eight other states had a decrease of 3.0 days or greater.

Yoswick added: "We're also seeing some other signs that the pace of work coming into shops has slowed in recent months. Shops' revenue expectations for 2024, based on the first five months of the year, hit a four-year low in June, according to our quarterly survey. More than half (54%) of about 400 responding shops said they expected revenues to be higher this year compared to last – including 33% who expected an increase of 10% or more. But that was down from the same survey's findings in the second quarter of 2023 (when 83% expected higher year-over-year revenues), and also down from the same period in 2022 (79%) and 2021 (66%). Nearly one in three shops (31%) expect 2024 revenues to fall short of the prior year, more than three times the number that thought that in the second quarter of 2022 and 2023."

"Three out of four collision repairers in the "Who Pays for What?" survey this spring said they had a positive or very positive outlook for their business over the coming 12 months. But that's the lowest percentage since 2020, including a 13-percentage point drop from a year earlier in the number who consider themselves "very positive", continued Yoswick.

## Total Loss

LOR for rentals associated with a total loss claim was 14.7 days, down 1.8 days from Q2 2023. Vermont had the highest total loss LOR at 19.2 days, followed by Hawaii (18.9) and West Virginia (17.9). South Dakota had the lowest LOR at 11.6 days. North Dakota (12.3) and Nebraska (12.9) had the next-lowest total loss LORs.

D.C. had the highest total loss LOR increase, with their 17.2-day result representing a 3.7-day rise. Vermont's highest result was a 1.9-day increase, while Hawaii (+0.8) and Maine (+0.2) were the only other states seeing an increase. Otherwise, all other states saw total loss decreases, with Alaska (14.5)

down 10.8 days. North Dakota was down 5.7 days, followed by South Dakota (-4.9) and Washington (-3.7).

Mandell also observed: “In the U.S., total loss frequency increased in Q2 2024 to 19.8%, which is up from 18.5% in Q2 2023. As vehicle values continue to decline, we expect total loss frequency to gradually increase as well, especially with severity gains not showing any signs of abating. With more vehicles being written off, the higher dollar repairs are no longer flowing into repair facilities, and overall repairable volumes will decline, creating fewer bottlenecks and delays in repair facilities.”

## Summary

As the numbers show, LOR has continued to decline from 2023’s highs but remains significantly higher than it was pre-pandemic.

Yoswick noted: “Shops may be working through their backlog more quickly than they did in recent years because of successful hiring. There were 99,540 body technicians employed in the industry by mid-2023, an increase of more than 8,000 in just one year, according to the Department of Labor. The number of painters in the industry rose by 1,130 during the same period, nearly a 5% increase over the prior year.”

As always, Enterprise is committed to partnering with insurers, repairers and suppliers on all the issues impacting repair times and LOR. Through foundational support provided by the Enterprise Mobility Foundation, Enterprise is spearheading the Collision Engineering program, designed to attract and develop entry-level talent to fill essential roles within the collision repair industry. For more information, visit [www.beacollisionengineer.com](http://www.beacollisionengineer.com).