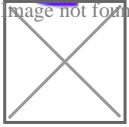




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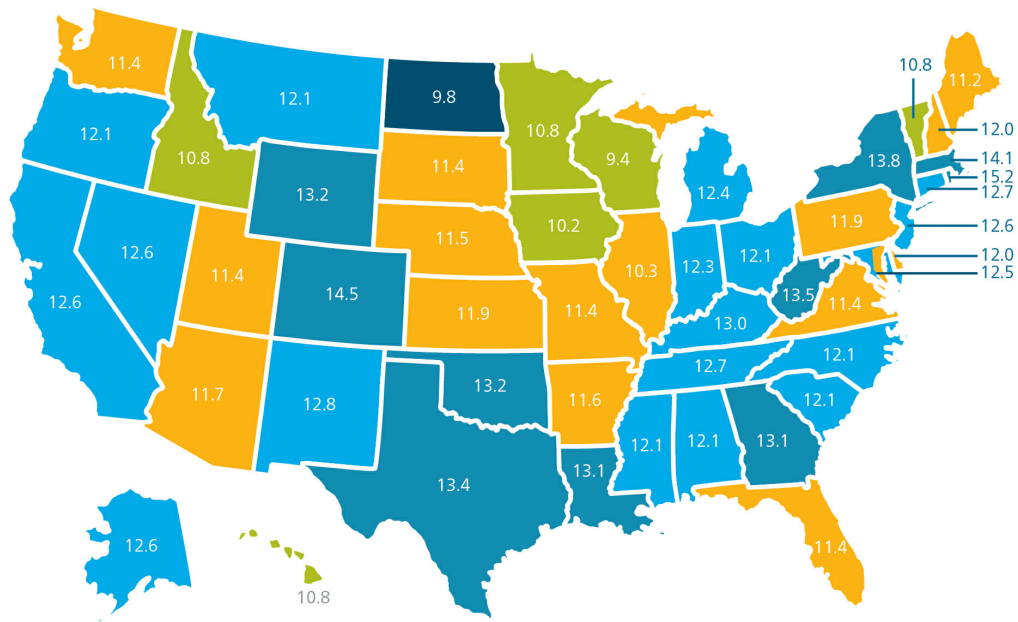
[Auto Physical Damage](#)

Average Length of Rental for Repairable Vehicles: Q3 2019

December 9, 2019
3 MIN READ

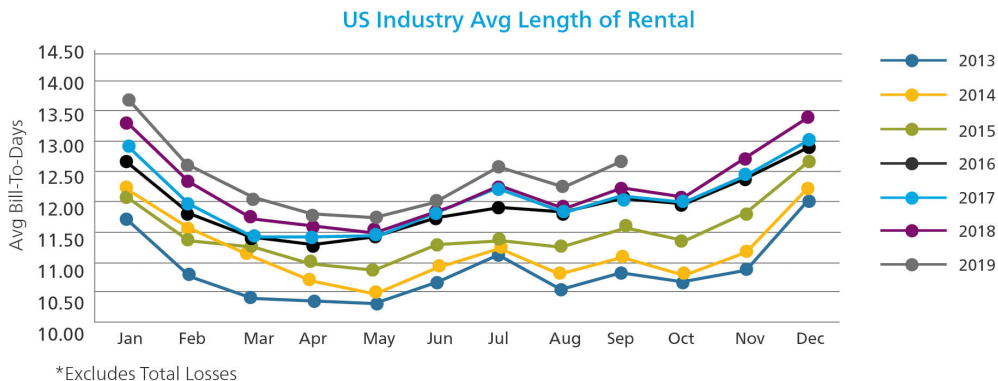
The quarterly LOR summary is produced by [Dan Friedman](#), Assistant Vice President Collision Industry Relations and Sales at Enterprise Rent-A-Car. Dan has 23 years of experience with Enterprise working within the collision repair industry. Through its ARMS® Automotive Suite of Products, Enterprise 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 or by contacting Dan Friedman at Daniel.Friedman@ehi.com.

U.S. Average Length of Rental (LOR) by State Q3 2019



U.S. Length of Rental—Q3 2019

Average Length of Rental (LOR) for Q3 2019 landed at 12.4 days in the United States, an increase of 0.4 days compared to [Q3 2018](#). Once again, there was very little consistency between regions and states or with Q2's numbers. The Mid-Atlantic and Midwest regions produced the largest increases at 0.5 days each. The average LOR ranged from a high of 13.5 days in the Northeast region to a low of 11.1 in the Pacific. At the state level, Rhode Island, Colorado and Massachusetts were the highend outliers at 15.2, 14.5 and 14.1 days while North Dakota and Wisconsin produced the lowest numbers at 9.8 and 10.1 days.



At least 22 states deviated significantly in terms of year-over-year change, further demonstrating a lack of consistency. Nebraska (1.5), Minnesota (1.0), Indiana and Arkansas (0.9) produced the largest increases. The most significant decreases in LOR included Puerto Rico (-2.4), Rhode Island, New Mexico and Hawaii (0.3).

The average LOR ranged from a high of 13.5 days in the Northeast region to a low of 11.1 in the Pacific.

As pointed out in previous updates, there remains a significant delta between average and best-in-class. Collision centers that invest in extensive training, consistently execute a robust scheduling strategy, and properly utilize the ARMS® Auto application, routinely outperform market-average LOR metrics.

| Average Billed Days for U.S. | | |
|------------------------------|---------|--------|
| Q3 2018 | Q3 2019 | Change |
| 12.0 | 12.4 | 0.4 |

| Average Billed Days for U.S. by Region | | | |
|--|----------------|----------------|--------|
| Region | Q3 2018 LOR | Q3 2019 LOR | Change |
| AK | 11.7 | 12.6 | 0.9 |
| AL | 12.3 | 12.1 | -0.2 |
| AR | 11.1 | 11.6 | 0.5 |
| AZ | 11.5 | 11.7 | 0.2 |
| CA | 12.3 | 12.6 | 0.3 |
| CO | 14.4 | 14.5 | 0.1 |
| CT | 12.5 | 12.7 | 0.2 |
| DC | 10.8 | 11.4 | 0.6 |
| DE | 11.8 | 12.0 | 0.2 |
| FL | 11.1 | 11.4 | 0.3 |
| GA | 12.3 | 13.1 | 0.8 |
| HI | 11.1 | 10.8 | -0.3 |
| IA | 9.9 | 10.2 | 0.3 |
| ID | 10.8 | 10.8 | 0.0 |
| IL | 11.2 | 11.4 | 0.2 |
| IN | 11.4 | 12.3 | 0.9 |
| KS | 11.2 | 11.9 | 0.7 |
| KY | 12.8 | 13.0 | 0.2 |

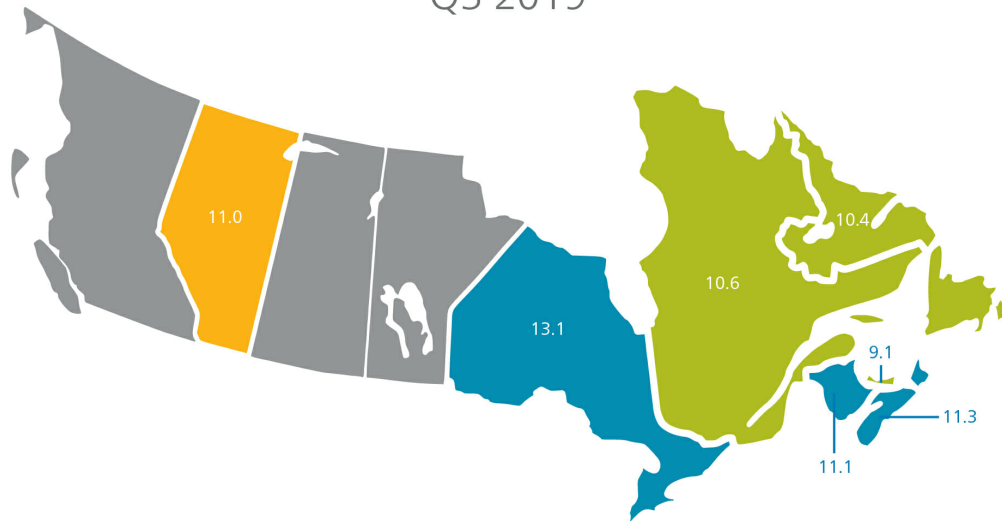
Average Billed Days for U.S. by Region

| Region | Q3 2018 LOR | Q3 2019 LOR | Change |
|--------|----------------|----------------|--------|
| LA | 13.0 | 13.1 | 0.1 |
| MA | 14.1 | 14.1 | 0.0 |
| MD | 12.0 | 12.5 | 0.5 |
| ME | 10.8 | 11.2 | 0.4 |
| MI | 11.9 | 12.4 | 0.5 |
| MN | 9.8 | 10.8 | 1.0 |
| MO | 11.0 | 11.4 | 0.4 |
| MS | 12.2 | 12.1 | -0.1 |
| MT | 12.2 | 12.1 | -0.1 |
| NC | 11.4 | 12.1 | 0.7 |
| ND | 9.5 | 9.8 | 0.3 |
| NE | 10 | 11.5 | 1.5 |
| NH | 11.7 | 12.0 | 0.3 |
| NJ | 12.3 | 12.6 | 0.3 |
| NM | 13.1 | 12.8 | -0.3 |
| NV | 12.3 | 12.6 | 0.3 |
| NY | 13.3 | 13.8 | 0.5 |

Average Billed Days for U.S. by Region

| Region | Q3 2018 LOR | Q3 2019 LOR | Change |
|--------|----------------|----------------|--------|
| OH | 11.5 | 12.1 | 0.6 |
| OK | 12.5 | 13.2 | 0.7 |
| OR | 12.3 | 12.1 | -0.2 |
| PA | 11.6 | 11.9 | 0.3 |
| PR | 15.5 | 13.1 | -2.4 |
| RI | 15.5 | 15.2 | -0.3 |
| SC | 11.7 | 12.1 | 0.4 |
| SD | 10.9 | 11.4 | 0.5 |
| TN | 12.4 | 12.7 | 0.3 |
| TX | 12.9 | 13.4 | 0.5 |
| UT | 11.1 | 11.4 | 0.3 |
| VA | 10.8 | 11.4 | 0.6 |
| VT | 10.3 | 10.8 | 0.5 |
| WA | 11.0 | 11.4 | 0.4 |
| WI | 10.0 | 10.1 | 0.1 |
| WV | 13.0 | 13.5 | 0.5 |
| WY | 12.4 | 13.2 | 0.8 |

Canadian Average Length of Rental by Province Q3 2019



Canada Length of Rental—Q3 2019

Canada's Length of Rental (LOR) finished at 11.8 days for Q3 2019. This result was 0.2 days better (lower than) the 12.0 day LOR Canada posted in [Q3 of 2018](#). The United States witnessed a LOR increase of 0.4 days (to 12.4) for Q3 2019 vs. Q3 2018, which meant that for Q3 2019, Canada's LOR was more than half a day (0.6) lower than the US. Because of its relative proximity to major Canadian population centres, the Northeast US Region is a useful point of comparison to Canada; it's LOR landed at 13.5 days for Q3 2019. Consistent with past results, we saw a large variance when we compared Canada's provincial results for Q3 2019. Alberta, Nova Scotia and PEI each produced LOR decreases over Q3 2018. Meanwhile, New Brunswick, Newfoundland and Quebec each posted an increase over last year. Interestingly, Canada's most populous province (Ontario), remained perfectly static at 13.1 days. Overall, Canada's Q3 2019 LOR ranged from a low of 9.1 days in PEI to a high of 13.1 days in Ontario. This marks the second consecutive quarter where Ontario and PEI produced the two extreme data points in Canadian LOR.

Overall, Canada's Q3 2019 LOR ranged from a low of 9.1 days in PEI to a high of 13.1 days in Ontario.

As in the US, there is a significant difference between "average" and "best-in-class" results for Canada. Collision Centres that adhere to an effective scheduling strategy, invest in extensive employee training, and utilize the ARMS® Auto Suite of products should expect to outperform the Canadian market average.

| Average Billed Days for Canada | | |
|--------------------------------|---------|--------|
| Q3 2018 | Q3 2019 | Change |
| 12.0 | 11.8 | -0.2 |

| Average Billed Days for Canada | | | |
|--------------------------------|----------------|----------------|--------|
| Province | Q3 2018 LOR | Q3 2019 LOR | Change |
| Alberta | 11.8 | 11.0 | -0.8 |
| Ontario | 13.1 | 13.1 | 0.0 |
| Quebec | 10.2 | 10.6 | 0.4 |
| Newfoundland and Labrador | 9.9 | 10.4 | 0.5 |
| New Brunswick | 10.2 | 11.1 | 0.9 |
| Nova Scotia | 11.6 | 11.3 | -0.3 |
| Prince Edward Island | 9.7 | 9.1 | -0.6 |



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