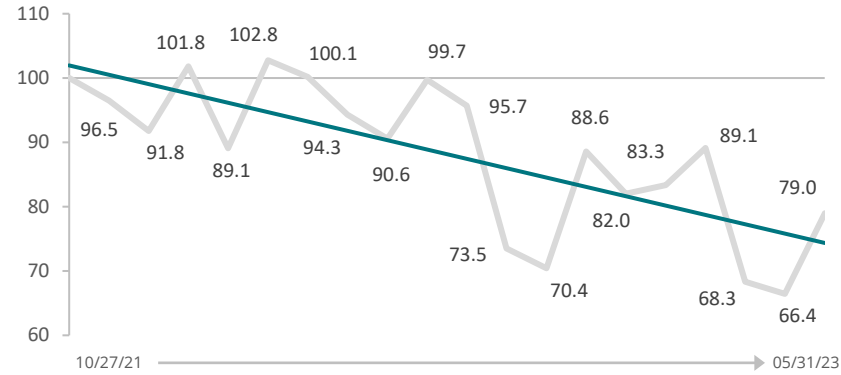


Vehicle Purchase Intent (VPI) Index United States



Note: 10/27/21 = 100; a vehicle is defined as a car, SUV/MPV, or pickup truck; includes new and used vehicles.

Key factors influencing VPI trending

Positive (+)

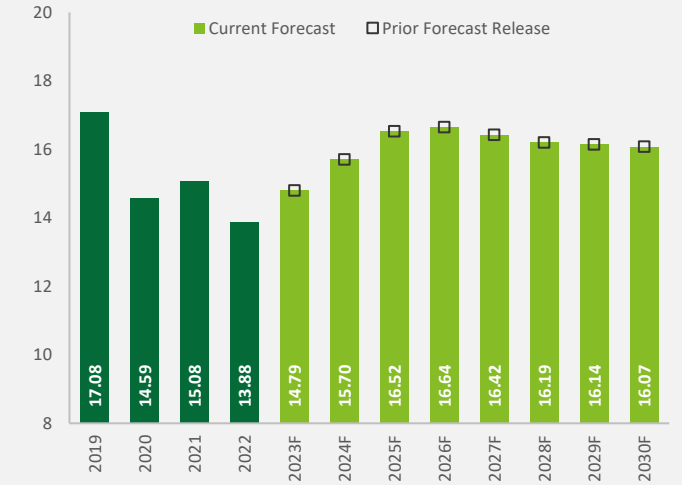
- Improving supply of new vehicles as semiconductor crisis continues to ease
- Vehicle prices stabilizing
- Underlying pent-up demand created by pandemic-related issues
- Resilient consumer spending trend
- Increasing consumer interest in EVs driven by strong desire to lower fuel costs and incentives
- Aging vehicle fleet requiring renewal

Negative (-)

- Inflation and interest rate hikes have led to much higher cost of borrowing
- Labor market under pressure as companies look for cost reduction measures
- Lack of affordable EV options in the market
- Historic transaction prices and monthly payments
- Resurgence of shared mobility in urban centers
- Geopolitical instability, and ongoing trade tensions

Light vehicle sales forecast (2019-2030F)

New vehicles (millions of units)



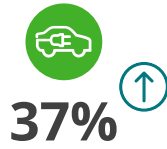
Source: S&P Global Mobility

Top 3 drivers of purchase intent

- | Rank | Driver | % of respondents |
|------|---|------------------|
| 1. | Current vehicle is not worth the cost of maintaining it anymore | 21% |
| 2. | New vehicles on market have features I want now | 17% |
| 3. | I am just ready to drive something different | 16% |

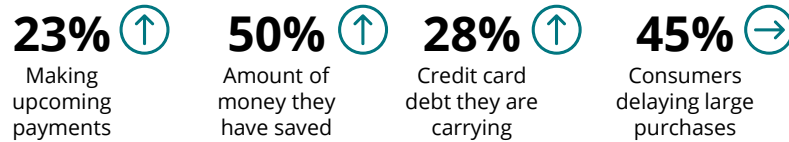
EV purchase intent

% of respondents



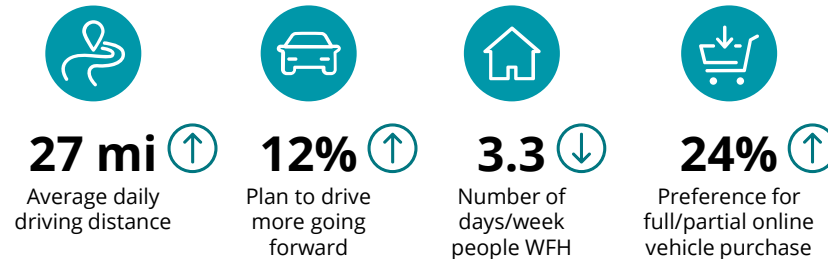
Note: EV includes full battery electric and hybrid vehicles.

Percentage of consumers concerned about...



Note: arrows represent directional change from prior release.

Key behaviors impacting mobility



For more info, click [here](#) or scan the code below.



The **Deloitte Vehicle Purchase Intent Index** is a proprietary measure of forward vehicle demand intent calculated based on the percentage of consumers that are planning to acquire a new or used vehicle in the next six months.

Source: Deloitte Global State of the Consumer Tracking Study (unless otherwise noted).

Weekly retail gasoline prices (all grades)

US\$/G (June 05, 2023)



Source: www.eia.gov/petroleum/gasdiesel/