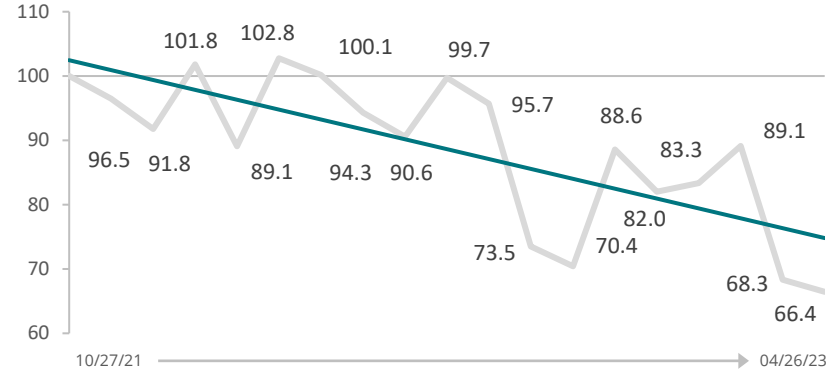


## Vehicle Purchase Intent (VPI) Index United States



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 prolonged inventory shortages
- Increasing consumer interest in EVs driven by strong desire to lower operating (e.g., fuel) costs and incentive support
- Aging vehicle fleet requiring renewal

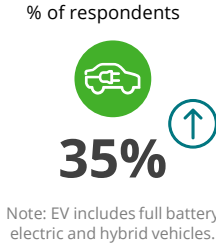
#### Negative (-)

- Inflation and interest rate hikes lead 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
- Record-pushing average transaction prices and monthly payments
- Resurgence of shared mobility in urban centers
- Geopolitical instability, and ongoing trade tensions

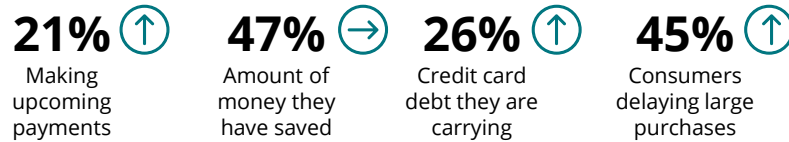
### Top 3 drivers of purchase intent

- | Rank | Driver  | % of respondents |
|------|---|------------------|
| 1.   | Current vehicle is not worth the cost of maintaining it anymore | 25%              |
| 2.   | I am just ready to drive something different                    | 24%              |
| 3.   | New vehicles on market have features I want now                 | 22%              |

### EV purchase intent

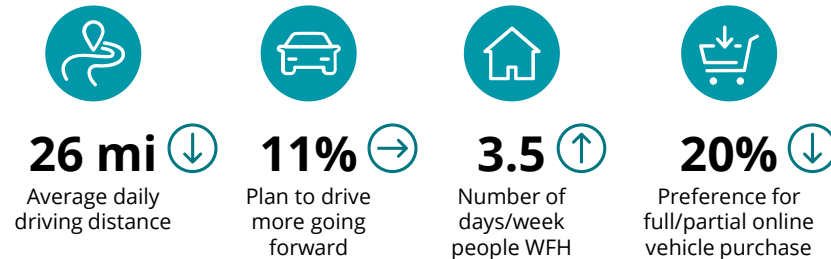


### Percentage of consumers concerned about...



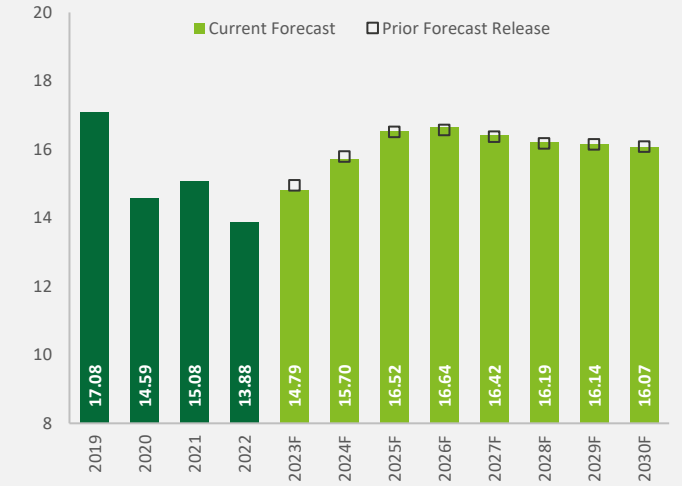
Note: arrows represent directional change from prior release.

### Key behaviors impacting mobility



### Light vehicle sales forecast (2019-2030F)

New vehicles (millions of units)



Source: S&P Global Mobility

### Weekly retail gasoline prices (all grades)

US\$/G (May 01, 2023)



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

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).