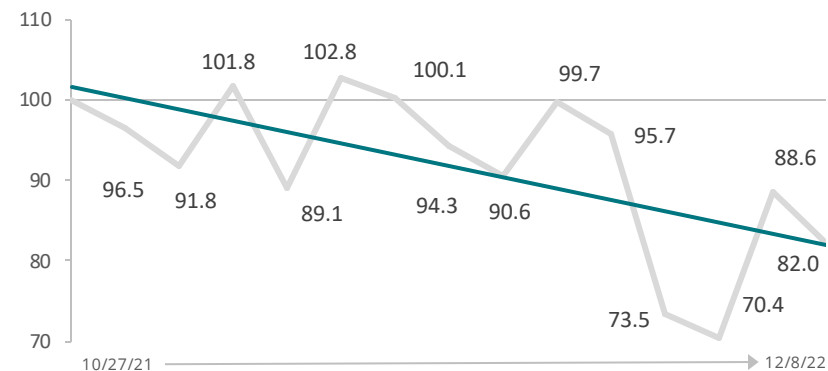


## Vehicle Purchase Intent (VPI) Index

United States



Note: October 27, 2021 = 100; a vehicle is defined as a car, SUV/MPV, or pickup truck; includes new and used vehicles.

### Key factors influencing VPI trending

#### Positive (+)

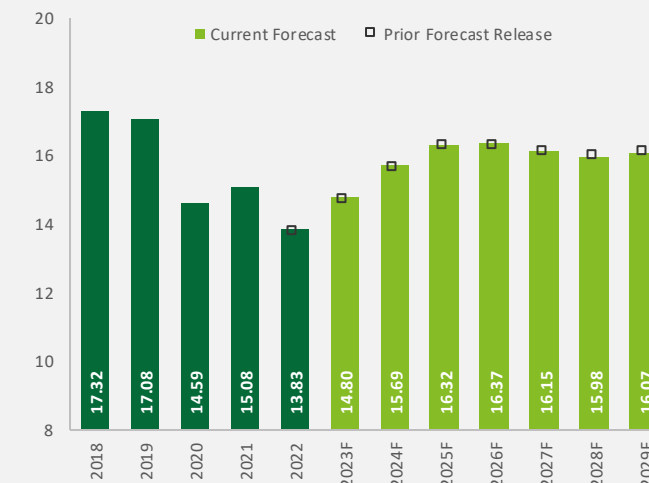
- Improving supply of new vehicles as semiconductor crisis continues to ease
- Vehicle prices stabilizing, but still elevated
- Underlying pent-up demand created by aging vehicle fleet and prolonged inventory shortages
- Increasing consumer interest in new wave of EVs sparked by fossil fuel prices that have come down sharply but remain historically elevated

#### Negative (-)

- Consumer concern over broad-based inflationary environment and share of wallet mobility represents
- OEM strategy to move product offerings upmarket, increasing affordability pressure
- Risk of demand destruction as vehicle ownership is out of reach for growing number of consumers
- Geopolitical instability, trade tensions & global supply chain disruptions affecting input costs

### Light vehicle sales forecast (2018-2029F)

New vehicles (millions of units)



Source: S&P Global Mobility

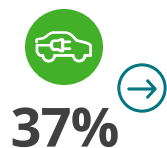
### Top 3 drivers of purchase intent

% of respondents

1. New vehicles on market have features I want now 28%
2. I am just ready to drive something different 22%
3. Current vehicle is not worth the cost of maintaining it anymore 19%

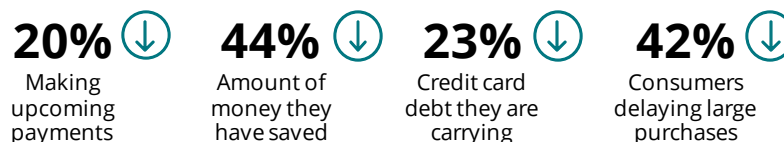
### EV purchase intent

% of respondents



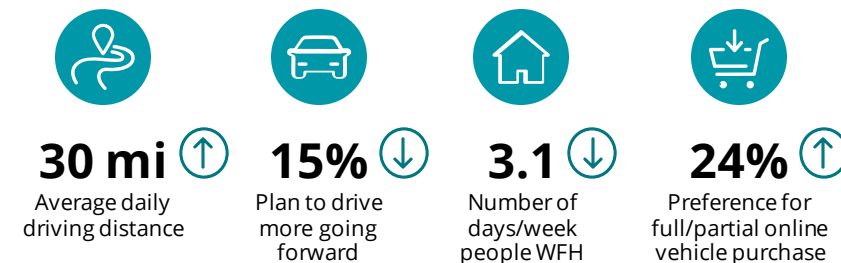
Note: EV includes full battery electric and hybrid vehicles.

### Percentage of consumers concerned about...



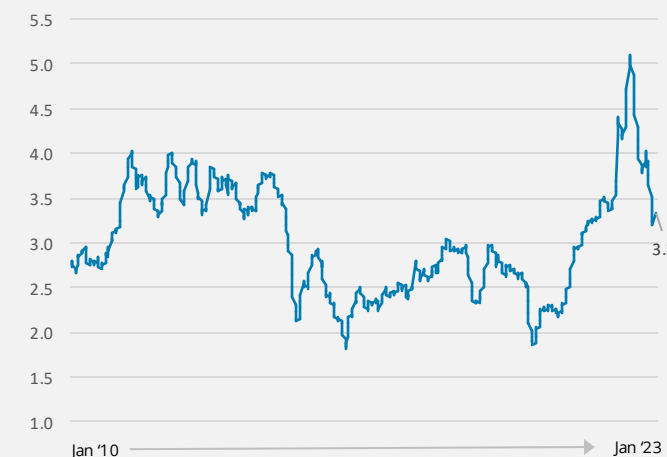
Note: arrows represent directional change from prior release.

### Key behaviors impacting mobility



### Weekly retail gasoline prices (all grades)

US\$/G



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).