Key factors influencing VPI trending

Positive (+)
- Pent-up demand created by prolonged periods of economic lock down and pandemic "wealth effect"
- Slowly increasing consumer interest in switching to electrified vehicles (EVs)
- Ongoing hesitation to use public/shared mobility
- More leasing + longer finance terms moderating monthly payments

Negative (-)
- Vehicle inventory shortages caused by semiconductor crisis
- Increasing transaction prices and rising overall inflation/interest rates
- Consumer concern regarding financial capacity going forward
- Global supply chain disruptions
- Geopolitical instability + commodity shortages

Top five drivers of forward vehicle purchase intent

<table>
<thead>
<tr>
<th>% of respondents</th>
<th>% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current vehicle is not worth the cost to maintain it</td>
<td>23%</td>
</tr>
<tr>
<td>New vehicles on market have features I want now</td>
<td>23%</td>
</tr>
<tr>
<td>I am just ready to drive something different</td>
<td>19%</td>
</tr>
<tr>
<td>My driving needs have changed</td>
<td>12%</td>
</tr>
<tr>
<td>I want a more fuel-efficient vehicle</td>
<td>7%</td>
</tr>
</tbody>
</table>

Percentage of consumers concerned about...

- Making upcoming payments: 30% (down)
- Amount of money they have saved: 62% (up)
- Credit card debt they are carrying: 48% (up)
- Consumers delaying large purchases: 53% (up)

Key behaviors impacting mobility

- Average daily driving distance: 29 mi. (up)
- Plan to use public transport more going forward: 9% (up)
- Plan to drive more going forward: 13% (down)
- # of days/week people WFH: 3.5 (down)

Source: Deloitte Global State of the Consumer Tracking Study (unless otherwise noted).
Source: www.eia.gov/petroleum/gasdiesel/