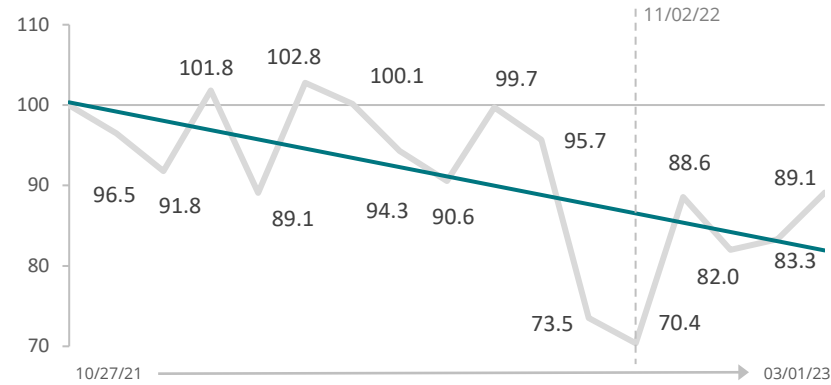


Vehicle Purchase Intent (VPI) Index United States



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 (+)

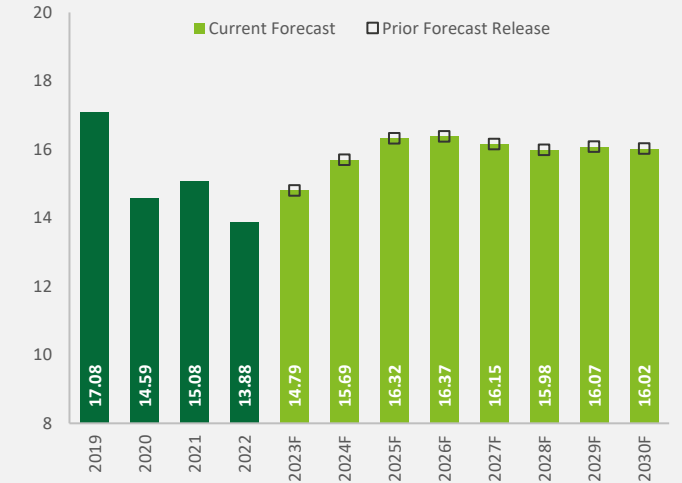
- Improving supply of new vehicles as semiconductor crisis continues to ease
- Vehicle prices stabilizing
- Underlying pent-up demand created by prolonged inventory shortages
- Increasing consumer interest in EVs driven by strong desire to lower operating (e.g., fuel) costs
- Aging vehicle fleet requiring renewal

Negative (-)

- Inflation, interest rate hikes, and total cost of ownership (TCO) elevating risk of demand destruction
- Lack of affordable vehicle options in entry segments
- Elevated transaction prices for new and used vehicles
- Resurgence of shared mobility in urban centers
- Geopolitical instability, trade tensions & global supply chain disruptions affecting input costs

Light vehicle sales forecast (2019-2030F)

New vehicles (millions of units)

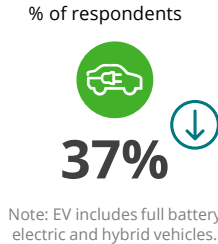


Source: S&P Global Mobility

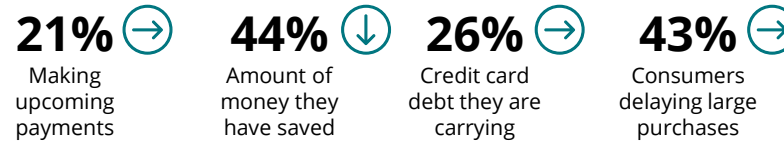
Top 3 drivers of purchase intent

- | Rank | Driver | % of respondents |
|------|---|------------------|
| 1. | New vehicles on market have features I want now | 24% |
| 2. | Current vehicle is not worth the cost of maintaining it anymore | 23% |
| 3. | I am just ready to drive something different | 17% |

EV purchase intent

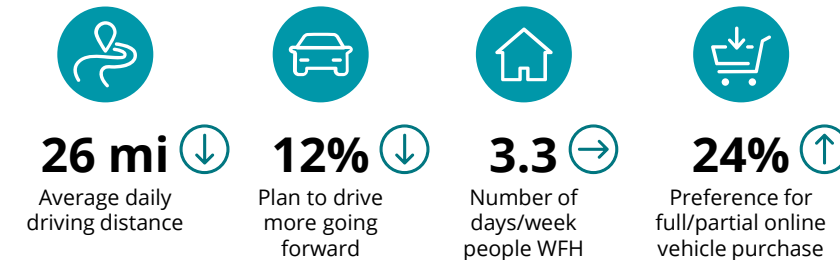


Percentage of consumers concerned about...



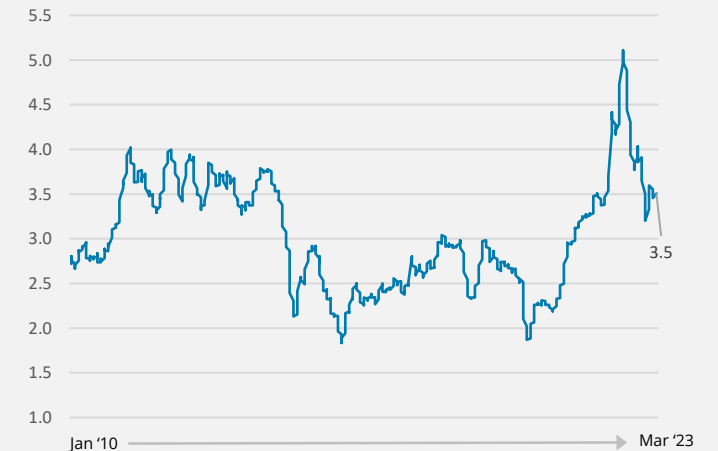
Note: arrows represent directional change from prior release.

Key behaviors impacting mobility



Weekly retail gasoline prices (all grades)

US\$/G (March 06, 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).