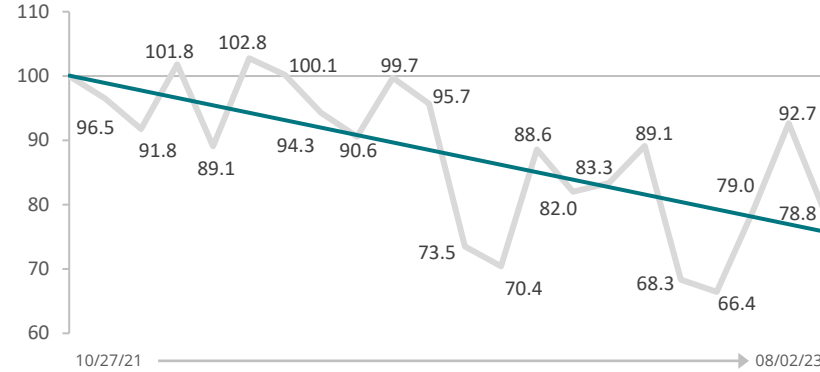


## Vehicle Purchase Intent (VPI) Index United States



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 (+)

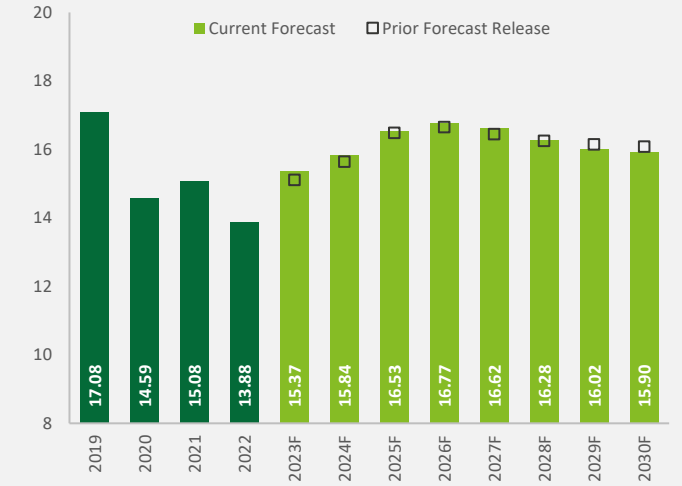
- Rapidly increasing vehicle inventories results in return of attractive consumer incentives
- Used vehicle prices moderating
- Underlying pent-up demand continues to be released into the market
- Increasing consumer interest in EVs driven by incentives and strong desire to lower fuel costs
- Aging vehicle fleet requiring renewal

#### Negative (-)

- Inflation and interest rate hikes have led to much higher cost of borrowing
- Risk that labor market may be coming under pressure as companies look for cost reduction measures
- Lack of affordable EV options in the market
- High 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)

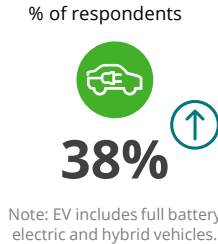


Source: S&P Global Mobility

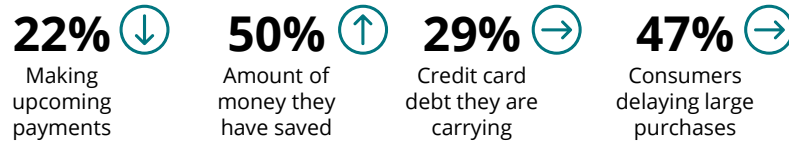
### Top 3 drivers of purchase intent

- | Rank | Driver  | % of respondents |
|------|---|------------------|
| 1.   | New vehicles on market have features I want now                 | 21%              |
| 2.   | Current vehicle is not worth the cost of maintaining it anymore | 21%              |
| 3.   | I am just ready to drive something different                    | 20%              |

### EV purchase intent

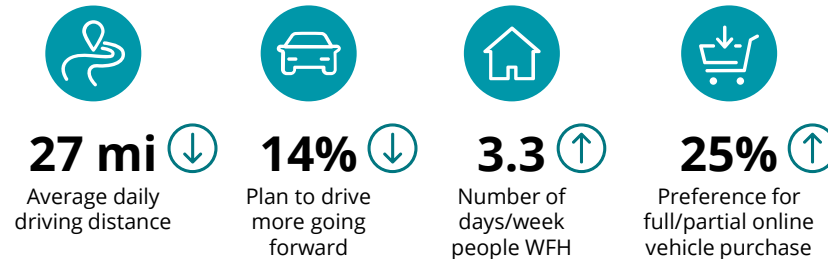


### Percentage of consumers concerned about...



Note: arrows represent directional change from prior release.

### Key behaviors impacting mobility



### Weekly retail gasoline prices (all grades)

US\$/G (August 07, 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).