

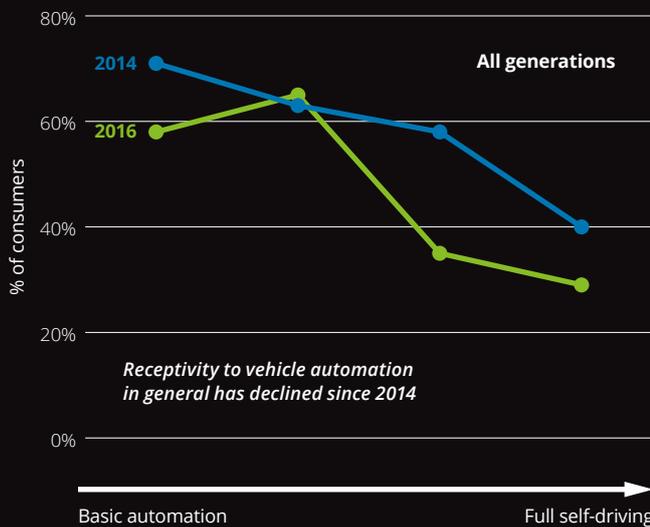
How do Italian consumers feel about the latest in-vehicle technologies?

Deloitte's Global Automotive practice has been exploring consumers' evolving automotive and mobility preferences since 2009. Our latest Global Automotive Consumer Study—the sixth—reveals some interesting insights into how consumers in Italy feel about rapidly evolving in-vehicle technologies. We will continue to reveal global insights of our latest research throughout 2017. For more information about prior studies, visit www.deloitte.com/autoconsumers

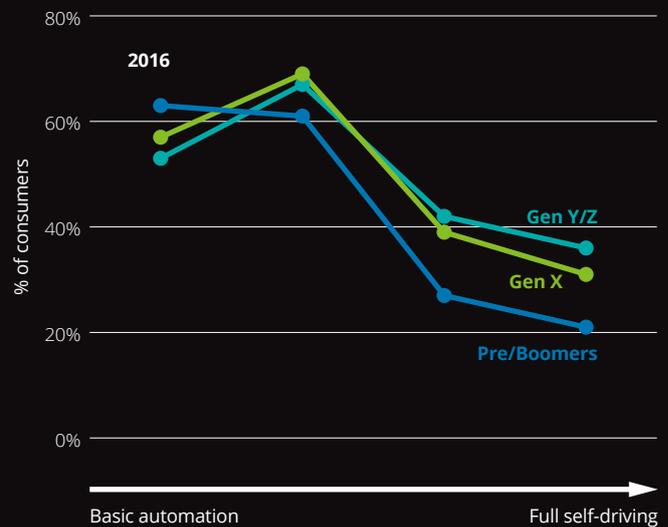


HOW DO ITALIAN CONSUMERS FEEL ABOUT IN-VEHICLE TECHNOLOGIES?

Italian consumers are showing resistance to assisted driving features...

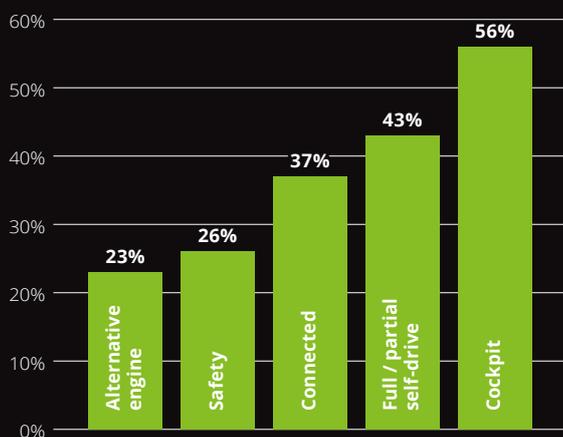


...but, Gen Y/Z consumers in Italy are the most receptive to assisted driving features



HOW MUCH ARE ITALIAN CONSUMERS WILLING TO PAY FOR THESE TECHNOLOGIES?

Although most consumers in Italy never or rarely use car-hailing services...



% of Italian consumers unwilling to pay more for various technologies

...but Italy's Gen Y/Z consumers say they will pay more than other generations



2x

How much more, on average, are Italian Gen Y/Z generation consumers willing to pay vs. Pre/Boomers

■ Gen Y/Z ■ Gen X ■ Pre/Boomers



HOW DO ITALIAN CONSUMERS FEEL ABOUT SAFETY VS. CONNECTIVITY?

SAFETY features win...

Features deemed most useful by Italian consumers



Recognizes objects on road and avoids collision



Blocks driver from dangerous driving situations



Informs driver of dangerous driving situations



Takes steps in medical emergency or accident

... but, TRUST needs to be earned

44%

Italian consumers who trust traditional manufacturers to bring self-driving technology to market



56%

Italian consumers who would most trust non-traditional players to bring self-driving technology to market

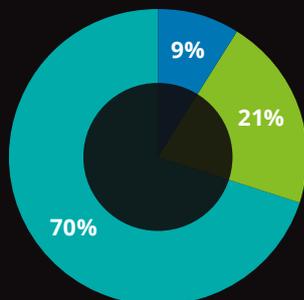


RIDE-HAILING NOT YET A RISK TO TRADITIONAL OWNERSHIP MODELS

Although most consumers in Italy never or rarely use car-hailing services...

91%

Italian consumers who never or rarely use car-hailing services

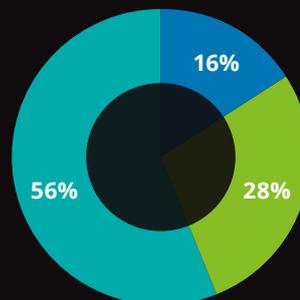


- Never
- Rarely
- At least once a week

...1 in 6 Gen Y/Z consumers regularly use car-hailing services

54%

Young Italian consumers who regularly use car-hailing and also question their need to own a vehicle in future



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Source: Deloitte Global Automotive Consumer Study

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