

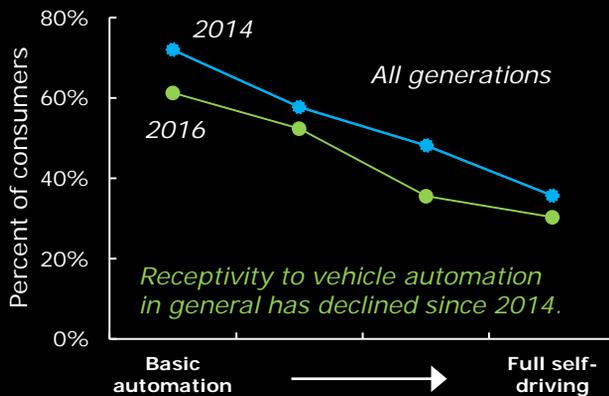
How do French consumers feel about the latest in-vehicle technologies?

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 France feel about rapidly evolving in-vehicle technologies. We'll continue to reveal global insights of our latest research throughout 2016 and 2017. For more information about prior studies, [visit www.deloitte.com/autoconsumers](http://www.deloitte.com/autoconsumers).

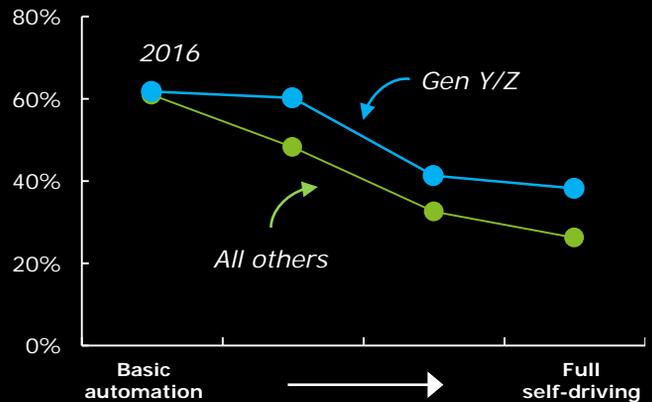


How do French consumers feel about in-vehicle technologies?

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

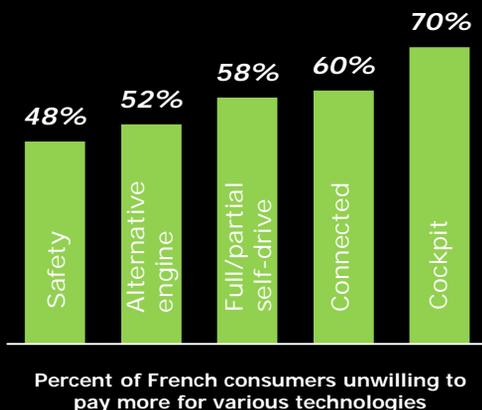


...but, Gen Y/Z consumers in France are the most receptive to assisted driving features

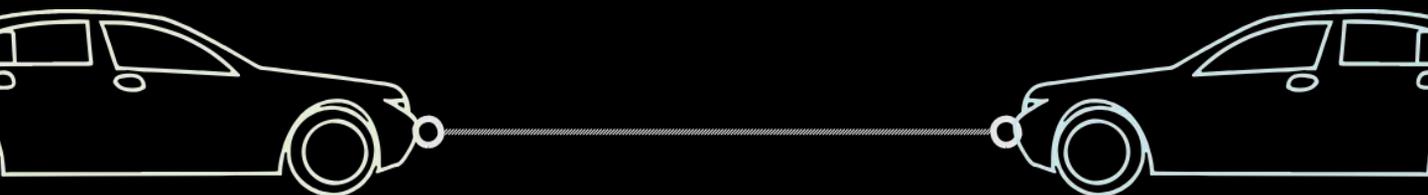
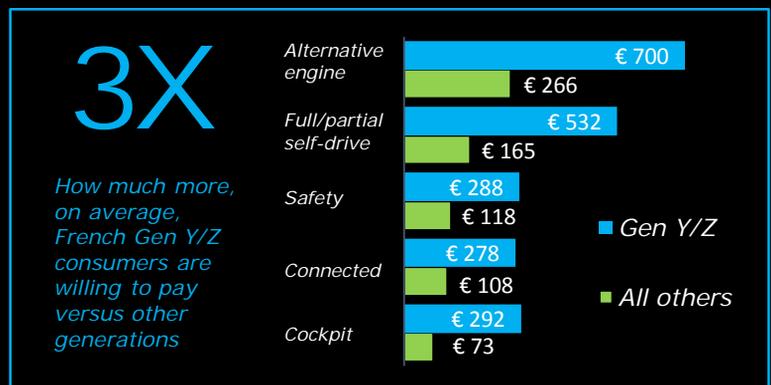


How much are French consumers willing to pay for these technologies?

Most French consumers are unwilling to pay extra for in-vehicle technologies...



...but French Gen Y/Z consumers say they will pay more than other generations





How do French consumers feel about safety vs. connectivity?

SAFETY features win...

Features deemed most useful by French consumers



Informs driver of dangerous driving situations



Recognizes presence of objects on road and avoids collision



Automatically blocks driver from dangerous driving situations



Automatically takes steps in medical emergency or accident

...but, TRUST needs to be earned

56%

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



44%

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



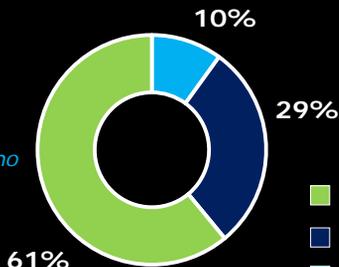
Car-hailing not yet a risk to traditional ownership models

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

...1 in 5 Gen Y/Z consumers regularly use car-hailing services

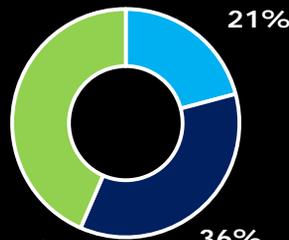
90%

French consumers who never or rarely use car-hailing services.



Overall Market

43%



Gen Y/Z

41%

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

Source: Deloitte Global Automotive Consumer Study

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