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The 2010 Accenture Consumer Electronics Products and Services Usage Report France

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Consumer electronics remain an important and growing part of not only many countries' economies, but also the lives of an increasing number of people all around the world. The *2010 Accenture Consumer Electronics Products and Services Usage Report* found that despite the recent global recession, consumers worldwide remain keenly interested in, and willing to invest in, a multitude of technology products and services. Our research shows that consumers in France agree.

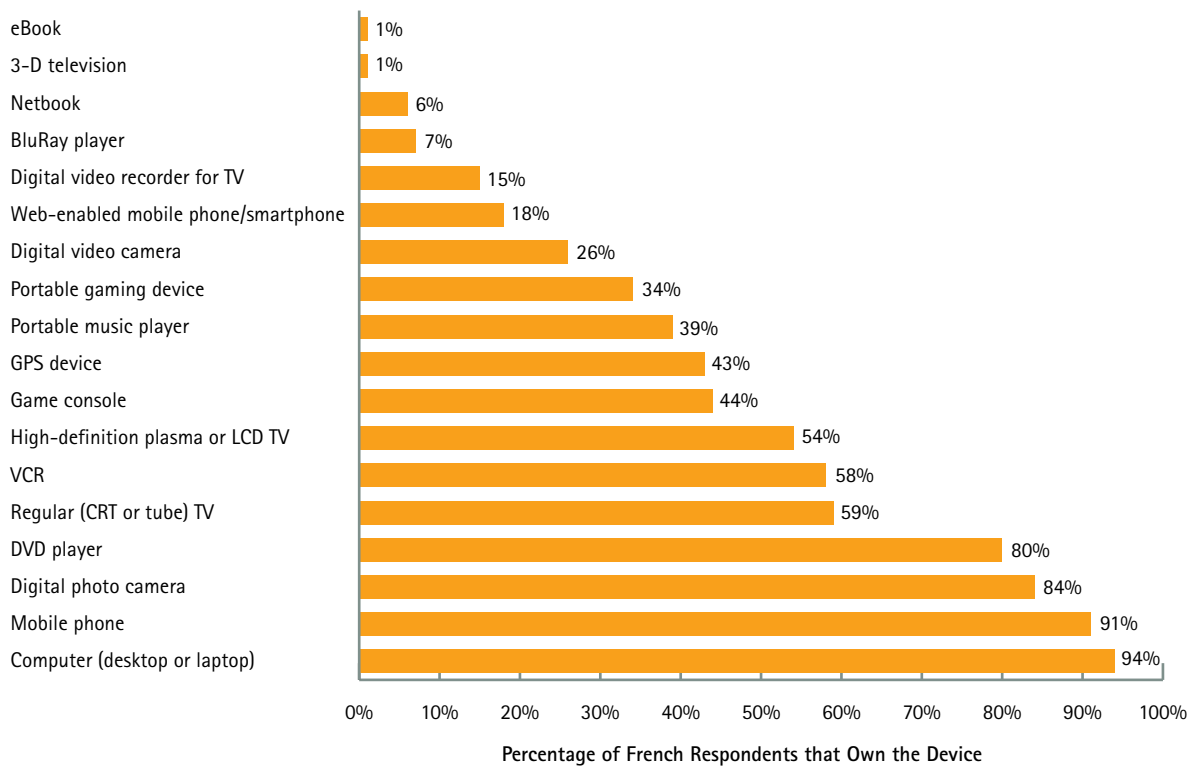
French respondents to the Accenture survey own numerous consumer technologies. In the past year, the vast majority has purchased new consumer technologies, and three-quarters of respondents plan to spend on technology in the next year. While overall technology purchase and use patterns among French respondents are slightly more conservative than other countries, French respondents reported enthusiasm for innovative technologies, services and applications despite the difficult global economy.

About the research

In late 2009, Accenture conducted primary research among 16,000 consumers to develop a greater awareness of consumer preferences for digital products and services. We hoped to better understand the purchase and use of digital products among key generations and gain deeper insights into differences in consumer preferences globally.

In France, one of eight countries selected for the research, an online survey was administered to 2,000 French adults—balanced across basic demographic factors, including geographic regions within France, age and gender. A summary of our extensive research findings on the purchase and use of consumer technologies among French respondents is presented below.

Figure 1. Consumer Technologies Owned by Respondents.



Key Findings

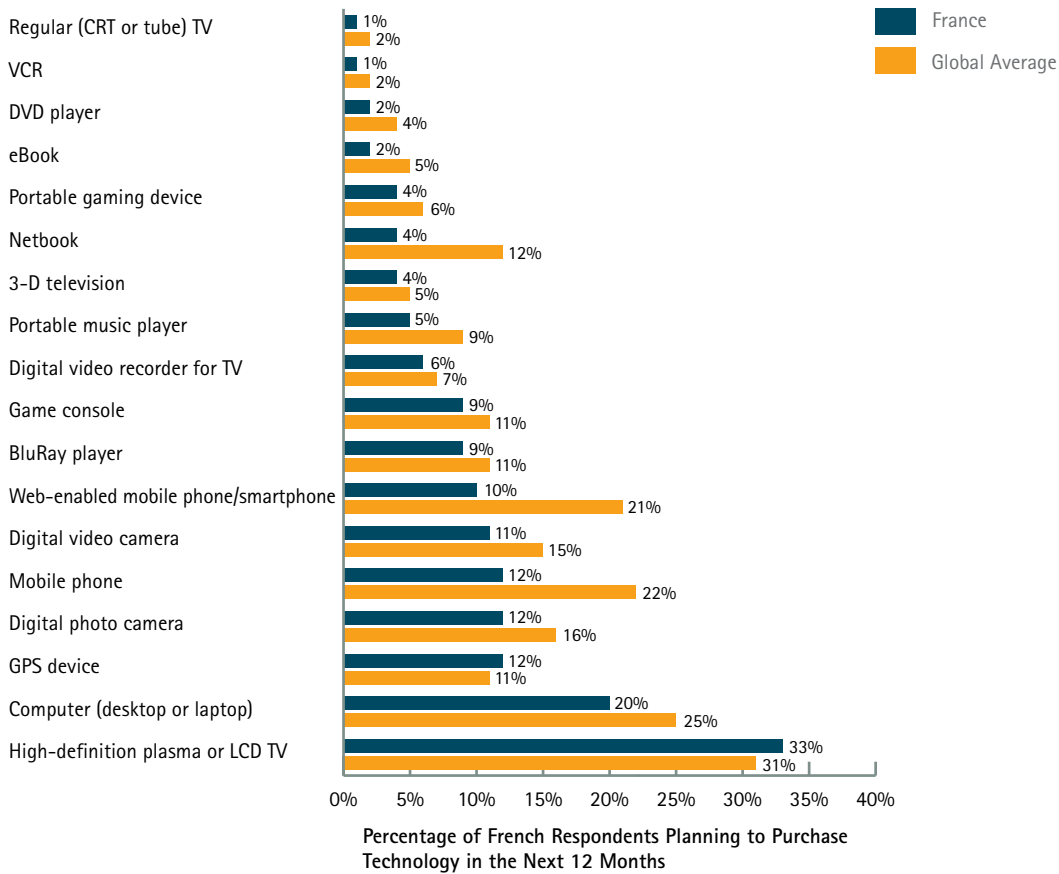
Computers and mobile phones are popular and pervasive

Computers and mobile phones are by far the most important and frequently used technologies in France. In fact, 94 percent of French survey respondents own a computer and 78 percent consider their computer to be one of their three most important technologies. Likewise, mobile phones are also important to respondents, with 91 percent owning one and nearly 70 percent ranking them in the top three technologies. Digital cameras and DVD players are owned by at least 80 percent of French respondents, and more than half own a regular TV, VCR and high-definition television (see Figure 1).

For most technologies the survey covered, ownership patterns are consistent between France and other western countries with a few notable exceptions. Forty-three percent of French respondents own a global positioning system—a greater GPS penetration than in any other country we surveyed and more than twice the global ownership average of 20 percent. Regarding newer technologies, a small percentage of French respondents own Netbooks and eBooks (6 percent and 1 percent, respectively). This is significantly lower than the global average ownership of 14 percent and 5 percent and slightly lower than the ownership rates in Japan (9 percent of Japanese respondents own Netbooks and 3 percent own eBooks).

In addition, only 18 percent of French respondents own a Web-enabled mobile device (or “smartphone”) compared with a global average of 29 percent and countries such as China and Singapore, where 59 percent and 46 percent of the respondents, respectively, own such a device. Web-enabled mobile devices are ranked in the top three most important technologies by only 9 percent of respondents in France. So, while mobile phones are both pervasive and important to French respondents, our survey indicates that Web-enabled phones have not yet reached the penetration levels of those countries where consumers depend more on mobile than home-based Internet access.

Figure 2. Plans to Purchase Technologies Next Year.

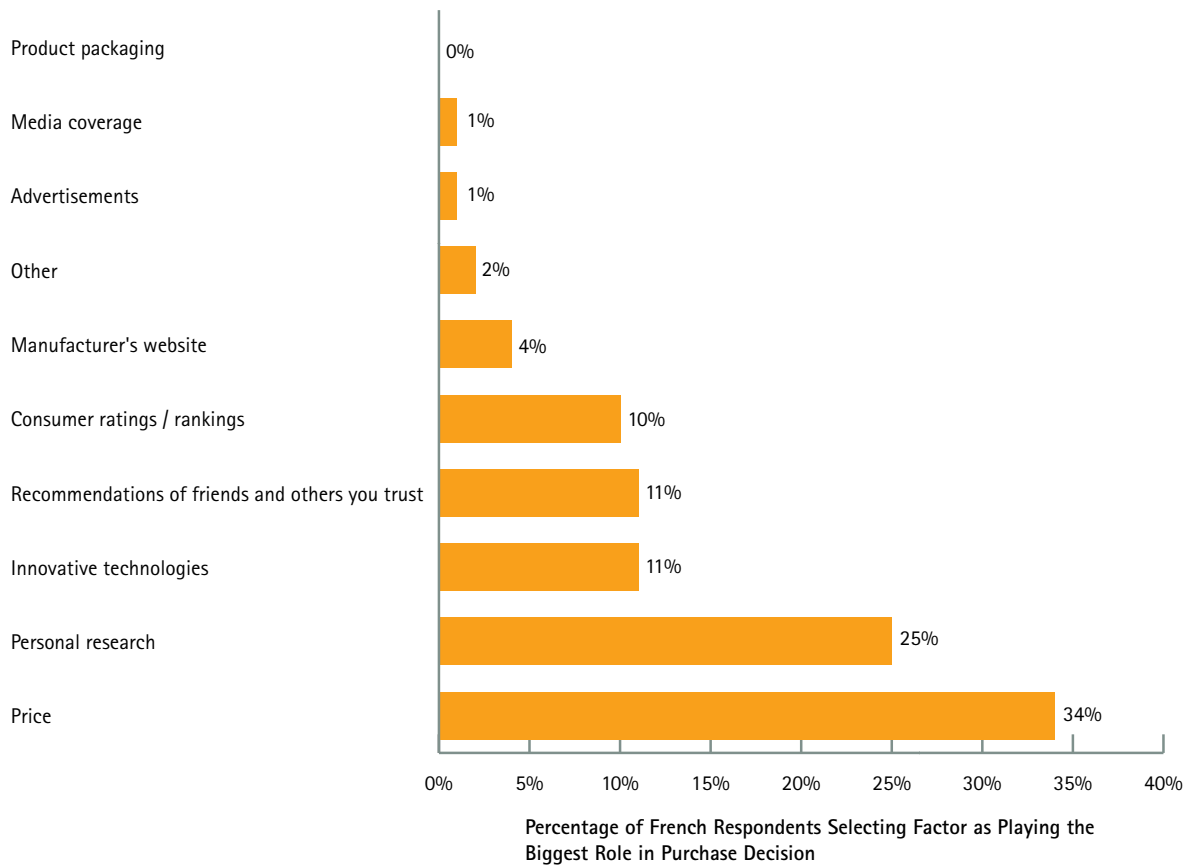


High-definition televisions and computers top purchase plans

Perhaps because of the recessionary times, 23 percent of French respondents reported that last year they did not purchase any of the 18 consumer technologies included in the survey. Of those making purchases last year, mobile phones were the most frequently purchased technology, followed by high-definition TVs and computers. High-definition TVs and computers are also the technologies that the largest percent of French respondents plan to purchase in the next year. So, while the survey indicates computers, mobile phones and high-definition TVs are the most frequently owned technologies across French respondents, they are also the most frequently purchased technologies.

While three-fourths of respondents plan to make technology purchases next year, French respondents' plans are, in general, more conservative than their worldwide counterparts. Across 16 of the 18 consumer electronics we asked about, a smaller percentage of French respondents plan to purchase them than consumers in rest of the world. The exceptions were high-definition TVs and global positioning systems, which were cited by slightly more French consumers than the global average as targets for acquisition next year (see Figure 2).

Figure 3. Purchase Decision Criteria.



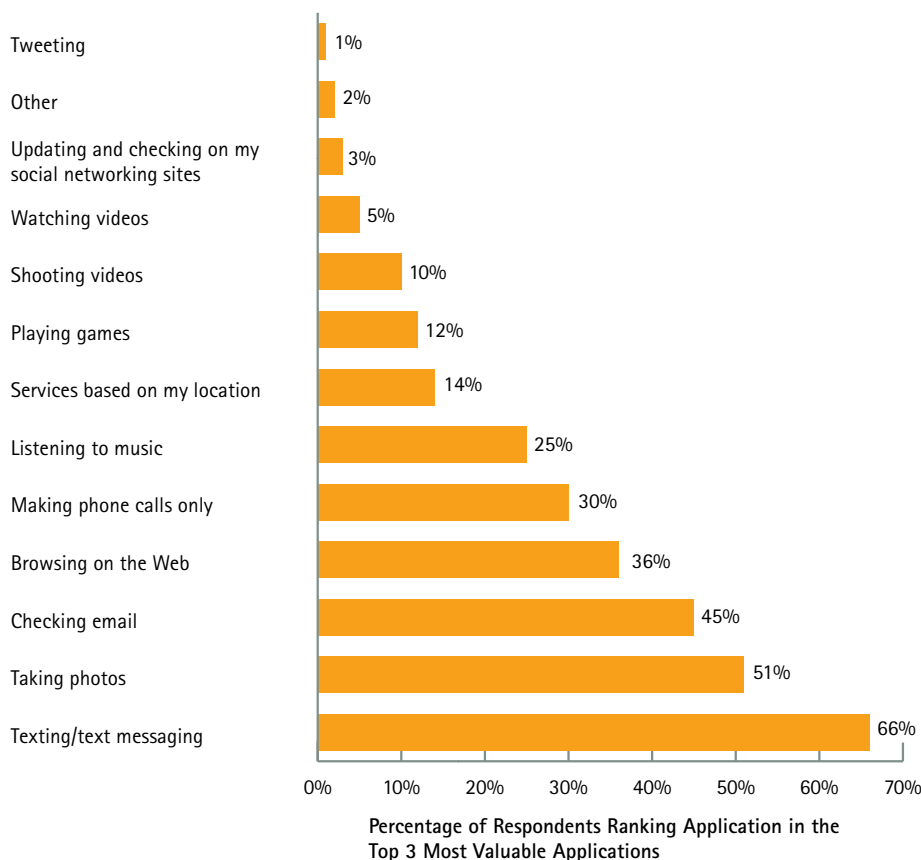
The importance of price, innovation and sustainability

How do French consumers decide what brands and products to buy? Price is the most important decision criteria when French respondents are making a consumer technology purchase, ranked as the most important by one-third of respondents. Slightly fewer respondents chose personal research as the top purchase decision criteria. Recommendations from friends, consumer rankings and innovative technologies are the most important decision criteria to far fewer respondents than price and personal research (see Figure 3). This set of decision criteria is consistent with other western countries we surveyed as well as Japan, Malaysia and Singapore. However, in higher-growth markets such as China and India, price is far less important.

Interestingly, price is slightly more important as a purchase decision factor to French female respondents than male respondents (38 percent of women rank it most important versus 30 percent of men). This is also the case in Germany and the United States, but not in other countries we researched. And, personal research is slightly more important to males (29 percent of males rank it as the top criteria versus 20 percent of females) across most countries. The choice of purchase decision criteria does not seem to be related to age at all. Baby boomers, Gen X and Gen Y show no notable differences in how they choose what to purchase.

While technology innovation is not a top purchase decision criteria among French respondents, 93 percent said it was important to them that the electronics brands they own are perceived as the most innovative of technologies. Hence innovation—or the perception of innovation—is fundamental to the success of any consumer electronics brand in France but perhaps not at a price premium. A similar dichotomy exists around the topic of sustainability and price. Despite the significance of price as a purchase criteria, 66 percent of French respondents said they would be willing to pay a premium for environmentally friendly technology products.

Figure 4. Top Phone Applications.



Taking advantage of mobile phone applications

By far, French respondents consider home Internet service and mobile phone service to be more important than other technology services. Given the pervasiveness of computers and mobile phone ownership in France, this is not surprising.

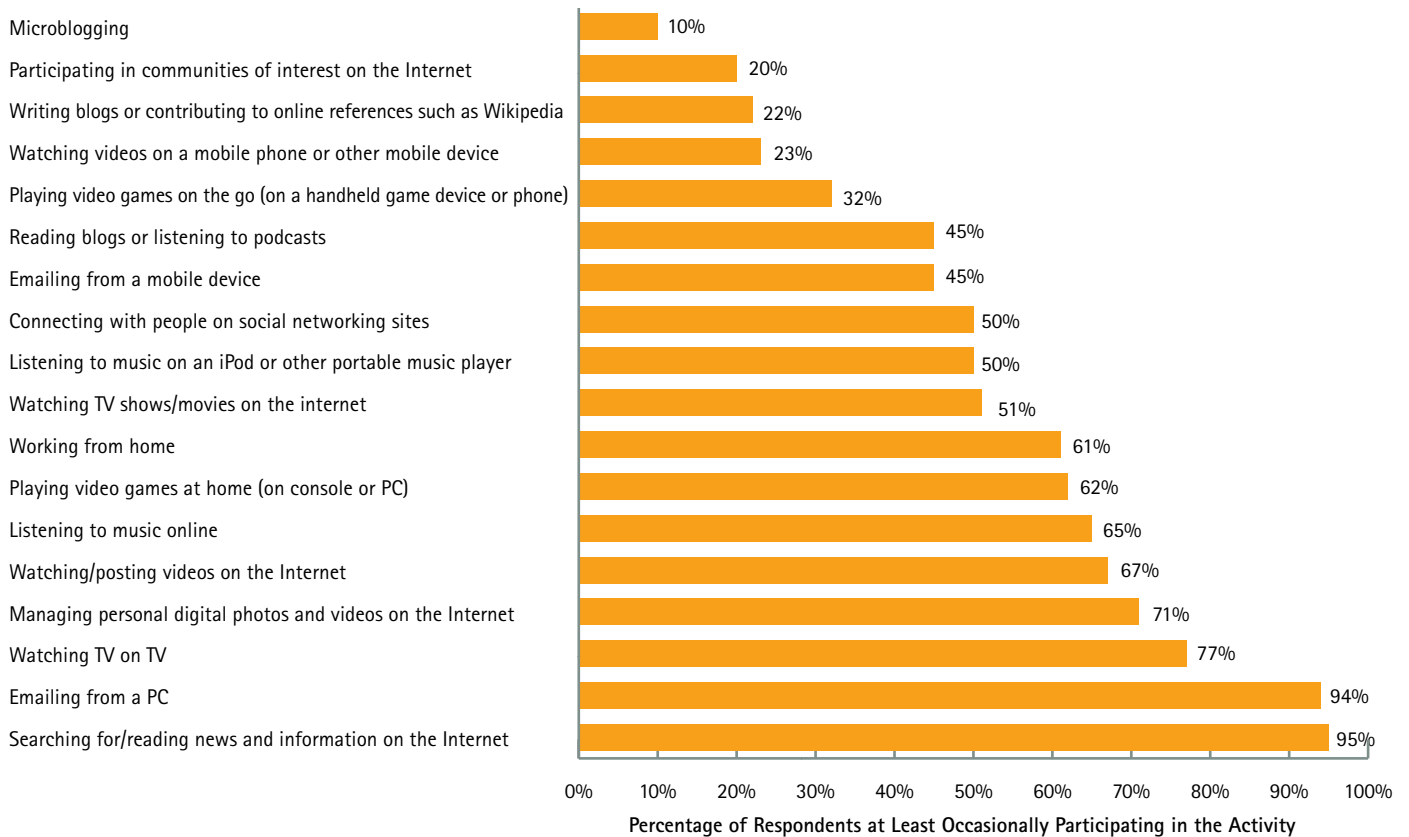
Other than making phone calls, texting is the most popular mobile phone application among French respondents. In fact, two-thirds of French respondents rank texting among their top mobile phone applications. Just over half of French respondents use their mobile phones to take pictures. Less than half of respondents use mobile phones to check email or browse the Web, which is logical given that less than one-quarter of respondents reported owning a Web-enabled mobile phone (see Figure 4).

Most popular technology-based activities

Nearly all French respondents check email on a personal computer, search for information online and read news on the Internet at least occasionally. While the next-most popular technology-based activity is watching TV (77 percent do so at least occasionally), fewer French respondents watch TV than the global average (of 87 percent). Other popular technology-based activities include managing photos on the Internet, watching and posting videos on the Internet, listening to music online and playing video games on a game console. About half of French respondents connect to people on social networking sites, listen to music on portable music players, or watch TV shows or movies on the Internet (see Figure 5).

Despite the finding that about half of French respondents use technology for social networking at least occasionally, the majority of French respondents have not yet embraced some of the newer, more interactive activities on the Internet. Only 20 percent participate in communities of interest, 22 percent write blogs or contribute to online references, and 10 percent do microblogging such as Twitter (this compares with 47 percent, 39 percent, and 24 percent of the global sample, respectively). Perhaps because of cultural differences and privacy or security concerns, France has the lowest participation in these three activities of the eight countries we surveyed.

Figure 5. Participation in Technology-Based Activities.



Social networking is significantly more popular among younger generation respondents in France. For instance, 71 percent of Gen Y respondents connect with people on social networking sites at least occasionally versus 37 percent of Baby Boomers. When asked about specific social networking sites, the greatest number of French respondents (56 percent) ranked Facebook as a site they use at least occasionally. But Copains d'avant ranked a close second in popularity (at 50 percent).

Implications for Enterprises Doing Business in France

Our research indicates that consumers' appetite for technology that enriches their lives remains strong. That certainly is good news for companies that provide such technologies and services, especially at a time when enterprises are working to reignite demand and growth. For consumer electronics manufacturers

and retailers doing business in France, the results of our study have several key implications that are presented below.

Across the global respondent base, adoption of consumer technologies, technology services and technology-based activities vary considerably among countries and often by age, gender and other demographics. The ability to gain deep insights into customers' needs and preferences is a competitive necessity for tailoring offers toward differences in consumer views and behaviors across regions, demographics, age, gender or other characteristics.

Companies must ensure their innovation capabilities remain strong and able to move quickly because virtually all French respondents believe it is important that the electronics brands they own are perceived as innovative.

Our study confirms that consumers increasingly care about sustainability. In fact, two-thirds of French respondents will pay a premium for environmentally friendly products. Companies that increase the "green" quotient of their products may capitalize on this opportunity to command a price premium.

As evidenced by low usage rates for netbooks and eBooks, and relatively low participation in communities of interest, blogging and microblogging, the use of newer technologies and interactive technology-based activities is at an early stage in France. This provides significant opportunity for those companies that can accelerate adoption.

With growing consumer enthusiasm for technology comes great opportunity for consumer technology companies to innovate—not only for the benefit of those consumers but also to support their ongoing pursuit of high performance.

For More Information

The information and analysis provided here is part of a larger global study conducted across eight countries, in the developed and emerging markets. For more information on the *2010 Accenture Consumer Electronics Products and Services Usage Report*, please contact your local Accenture representative or visit www.accenture.com/2010GlobalConsumerTech

About Accenture

Accenture is a global management consulting, technology services and outsourcing company, with more than 176,000 people serving clients in more than 120 countries. Combining unparalleled experience, comprehensive capabilities across all industries and business functions, and extensive research on the world's most successful companies, Accenture collaborates with clients to help them become high-performance businesses and governments. The company generated net revenues of US\$21.58 billion for the fiscal year ended Aug. 31, 2009. Its home page is www.accenture.com

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