

# COVID-19 and the automotive consumer : How can automotive organizations re-engage consumers and reignite demand?

Even before the COVID-19 pandemic, the global automotive industry was grappling with a prolonged slowdown: the number of vehicles sold across major global markets, for example, dropped to 90 million units in 2019, significantly less than the record 95 million vehicles sold in 2017.<sup>1</sup> Against this backdrop, the COVID-19 outbreak has been a significant body blow to the industry. New vehicle sales declined in China by 42% in Q1 2020 and large automakers in US have reported sales declines, ranging from 37% to 50%.<sup>2</sup> This reflects the significant disruption facing the industry:

- Shelter-in-place orders, along with economic uncertainty and anxiety about recession and job losses, have knocked consumer confidence, leading to people avoiding major purchases.
- National and international lockdowns have disrupted the production and supply chains of the industry's original equipment manufacturers (OEMs). Their suppliers have also faced the same strains. Also, given the industry's traditional reliance on physical retail channels, lockdowns have disconnected dealers from potential buyers.

Despite these disruptive trends, consumer demand is beginning to show signs of resilience. For instance, as lockdowns started to be lifted in China, vehicle sales in March fell at a slower rate. In fact, they were 367% higher than sales in February 2020.<sup>3</sup> And, even as the pandemic started to proliferate across the US in late March, new vehicle sales declined at a lesser rate than was expected in the first 12 days of April.<sup>4</sup>

To help understand the full implications of the COVID-19 crisis for the industry and its market – and provide insight into how companies can shape their response – we launched a global consumer-facing survey. This reached 11,000 consumers from 11 countries – the US, the UK, France, Germany, China, the Netherlands, Sweden, Norway, Italy, Spain, and India. These countries together represent 62% of global annual passenger vehicle sales in 2019.<sup>5</sup>

This research note outlines the key trends that emerged:

- 1. Vehicle use: Driven by health and safety concerns, consumers are veering towards individual mobility over public transport and shared mobility services.** Close to half will use their car more frequently and make less use of public transport and shared mobility services.
- 2. Vehicle purchase: Three-quarters of those who intend to purchase a car in 2020 will do so to gain better control over hygiene.** Younger consumers (<35 years of age) are the largest segment considering buying a new vehicle in 2020 – a reversal of their historical preference to avoid vehicle ownership. However, to afford to do this, they are looking for financial support, with easy financing and flexible payment models.
- 3. Channels of engagement: Close to half (46%) of the consumers want to minimize visiting dealerships to compare deals and mainly use online channels for information search and purchase.** OEMs and dealers must quickly step-up the use of mobile apps, social media, voice interfaces and AR/VR to provide a seamless, “zero-contact” experience.

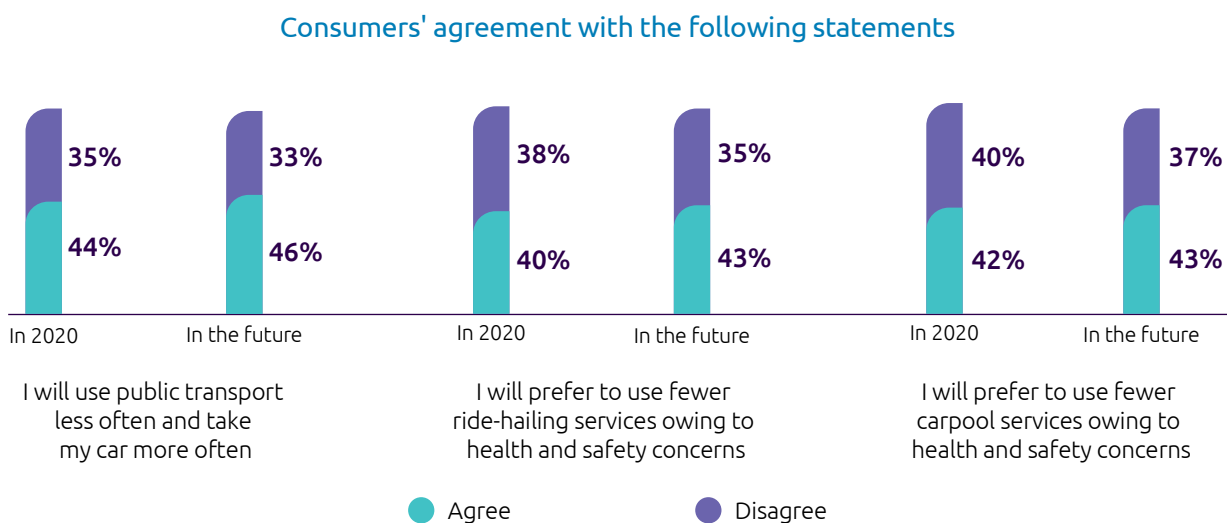
Given these factors, the automotive industry is going to look very different compared to pre-crisis. On one hand, consumers’ desire to avoid public transport and shared mobility will likely drive higher demand for owning personal vehicles. On the other hand, the economic fallout will impact people’s discretionary spending, and increased work-from-home operating models could mean less car-based work commuting. In this research note, we examine some of the key issues that will shape this future, providing consumer-facing insight as the industry’s players build their resilience and recovery plans.

### Consumers steer towards individual mobility for health and safety reasons

*Consumer appetite for mobility services and public transport will reduce significantly – now and in the future*

Today, nearly half (44%) of consumers say that they will use their car more often and public transport less often and at least 40% say they will make less use of ride-hailing and ride-sharing services. The key reason behind this shift is concern over health and safety. Our research shows this sentiment will remain consistent into the future.

Figure 1: Consumers prefer individual mobility at the expense of public transport and shared mobility services



Source: Capgemini Research Institute, Consumer Behavior Survey, April 4–8, 2020, N=11,281 consumers. Consumer were asked to rate their agreement of a statement from 1–7, where 5, 6, 7 were considered “agree”, 4 as “neutral” and 1, 2, 3 as “disagree” for the question: On a scale of 1–7, where 1= “Strongly Disagree” and 7= “Strongly Agree.” Neutral is not shown.

This appetite for health and safety is reflected in other findings on what consumers want from their cars as they consider a purchase. For example, 66% of potential buyers are looking for health and wellness features, such as air conditioning with germ filters, and, 59% of potential buyers are willing to pay a premium for health and wellness features.

### Actions for automotive organizations

- **Adapt your communications strategy to appeal to the current needs.** Consumer preference for personal vehicles over shared mobility is a clear indicator of a desire to avoid potentially harmful environments. Automotive organizations need to ensure their marketing and sales communication is in tune with this need.
- **Create targeted offers to tap into latent consumer demand.** A recent survey we conducted among German consumers found that 89% of those who are reluctant to buy a car now would be tempted to purchase one if they received an attractive offer or a good customer experience. Governments are starting to introduce incentives to spur consumer demand. As many as 12 cities or provinces in China are offering cash subsidies of as much as \$1,400 per vehicle to buy cars.<sup>6</sup> This model could be replicated by governments in other countries too – for instance, after the 2008 financial crisis, the US government’s Car Allowance Rebate System scheme in 2009 offered \$3,500-\$4,500 to US consumers to drive demand for newer, more efficient cars.<sup>7</sup> Automotive OEMs and dealers can capitalize on this by:
  - Creating package bundles with complementary services and accessories: 41% of consumers said they expect services such as professional antibacterial disinfection, and a third (33%) of all consumers are willing to pay a premium for cars that offer health and wellness features.
  - Offering temporary discounts, and financing or leasing promotions.
  - Push green vehicles to drive sustainable mobility and reflect the societal change
- **Speed up supply chain integration to increase visibility and demand forecasting.** Automotive supply chain teams can use the downtime offered by lockdown and curbs on inventory movement. This time can be an opportunity to build a clear picture of vehicle inventory and offering consumers an on-demand view of what vehicles are available. A clear view of inventory supports faster decision-making: 43% of German consumers said that they would be more likely to buy a car if it were quickly available.
  - Consider updating demand forecasting models. To respond to demand fluctuations in this unprecedented situation, sales & operations planning teams need to quickly update their forecasting models. This is critical to be able to anticipate which models, makes, and markets will drive demand. Similarly, parts’ and accessories’ demand forecasting will require a revamp.
- **Lease or license mobility services to other businesses.** Automotive OEMs and dealers should aim to create targeted offers for industries that are particularly affected by lockdowns. For instance, introducing short-term leasing for retail and e-commerce organizations to help them tackle the strains on their last-mile delivery operations.

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**89% OF GERMAN CONSUMERS WHO ARE RELUCTANT TO BUY A CAR NOW WOULD BE TEMPTED TO PURCHASE ONE IF THEY RECEIVED AN ATTRACTIVE OFFER OR A GOOD CUSTOMER EXPERIENCE**

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## Consumer demand, driven by mobility needs and hygiene factors, has the potential for a comeback

*“Sales are starting again (in China), the showrooms are open, and customers are buying cars again, which shows us that with a good crisis management and good coordination between politicians and companies, corporations, even a dramatic crisis, such as corona, can be managed. And we are confident that we’ll be able to do that in Europe as well.”*

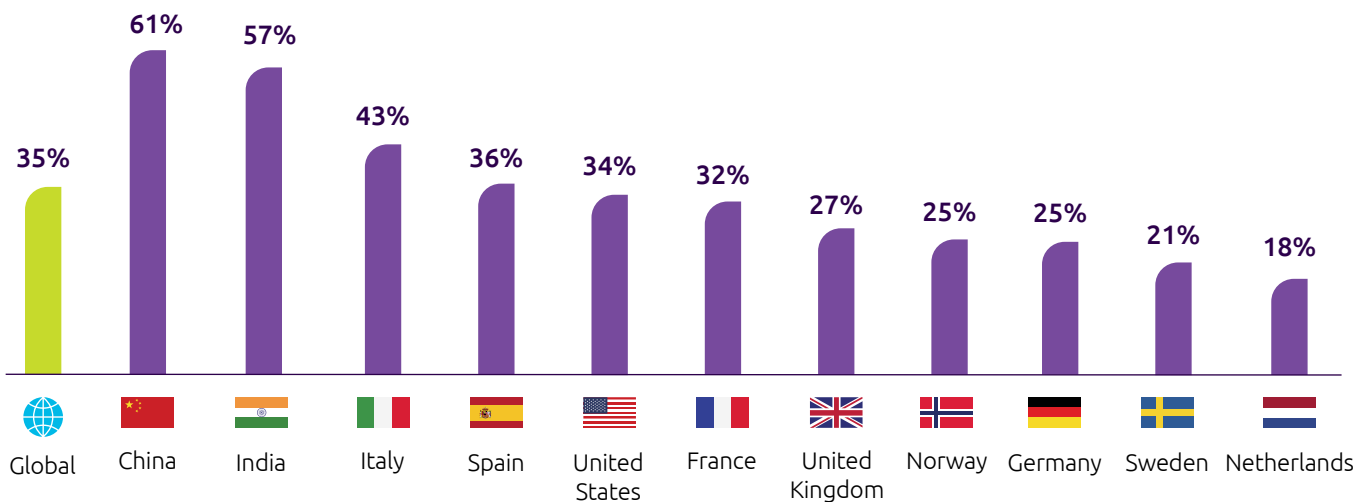
Herbert Diess, Volkswagen AG – Chairman of Management Board, CEO & Chairman of Volkswagen Brand Board of Management<sup>8</sup>

Our survey shows that:

- Consumer sentiment is positive about recovery from the current outbreak. Overall, 50% of consumers are optimistic about recovery in the next six months and 73% over the next 12 months.
- Over a third (35%) of consumers are considering buying a car in 2020. China and India lead among the countries that have strong consumer intent to purchase, with a majority of consumers intending to buy a car in 2020 (see Figure 2). Sweden and the Netherlands are towards the lower end.

**Figure 2:** China and India have the most consumers considering purchasing a car in 2020

### Percentage of consumers considering buying a car in 2020



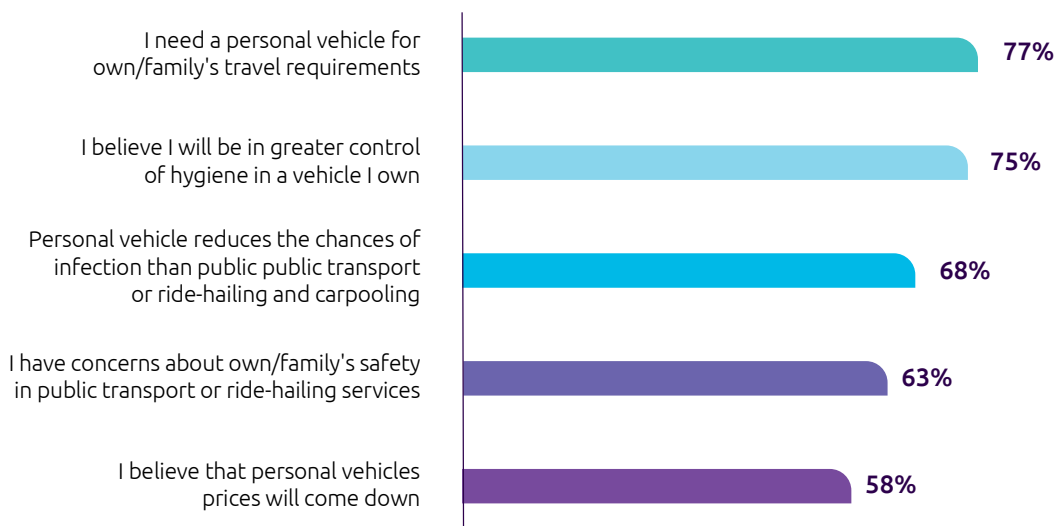
Source: Capgemini Research Institute, Consumer Behavior Survey, April 4–8, 2020, N=11,281 consumers. People who consider buying a car have selected “Strongly considering” and “considering” to the question: Are you considering purchasing a new/another personal vehicle in 2020?

Three-quarters (75%) of consumers who intend to make a purchase in 2020 say that it is because ownership gives them greater control of hygiene – the second-highest reason to buy a car (see Figure 3). Dr. Johan Jansson, associate professor of Marketing at Lund University School of Economics and

Management told us, *“Consumers are definitely looking out for health and cleanliness features in cars right now when the pandemic is at the top of their mind. But I believe that once the crisis is over, cleanliness might still be important but it will likely differ in different markets depending on measures taken by for example public transport operators and regulators.”*

**Figure 3:** Travel requirements, hygiene and safety are the main reasons to buy a car in 2020

**Percentage of respondents who state the following reasons to buy a car**



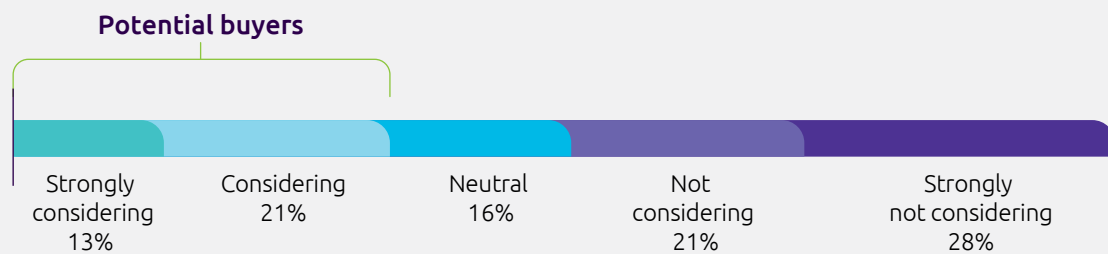
**Source:** Capterra Research Institute, Consumer Behavior Survey, April 4–8, 2020, N=3,900 consumers who are considering purchasing a new/another personal vehicle in 2020. Percentages denote people who have selected 5 and above for the following question: What are the reasons for considering purchase of a personal vehicle in 2020? Please rate the following reasons on a scale of 1 to 7, where 1= “Strongly disagree as a reason” and 7 = “Strongly agree as a reason.”

### Who is likely to purchase new vehicles in 2020?

We found that more than a third (35%) of consumers worldwide are “potential buyers” – those who are considering purchasing a car in 2020:

**Figure 4:** A considerable segment of the population is considering buying a car in 2020.

#### Percentage distribution of consumers considering purchasing a car in 2020

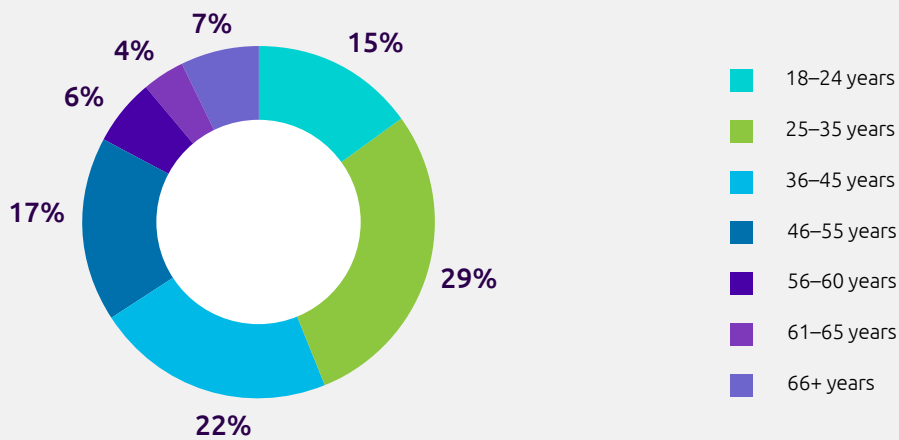


**Source:** Capgemini Research Institute, Consumer Behavior Survey, April 4–8, 2020, N=11,281 consumers. Numbers do not add up to 100 due to rounding.

We saw earlier how India and China have a strong base of potential buyers. And, as we show below, 44% of potential buyers are under 35 years old. India and China together constitute 36% of the under-35 potential buyers’ group.

**Figure 5:** Potential buyers tend to be younger

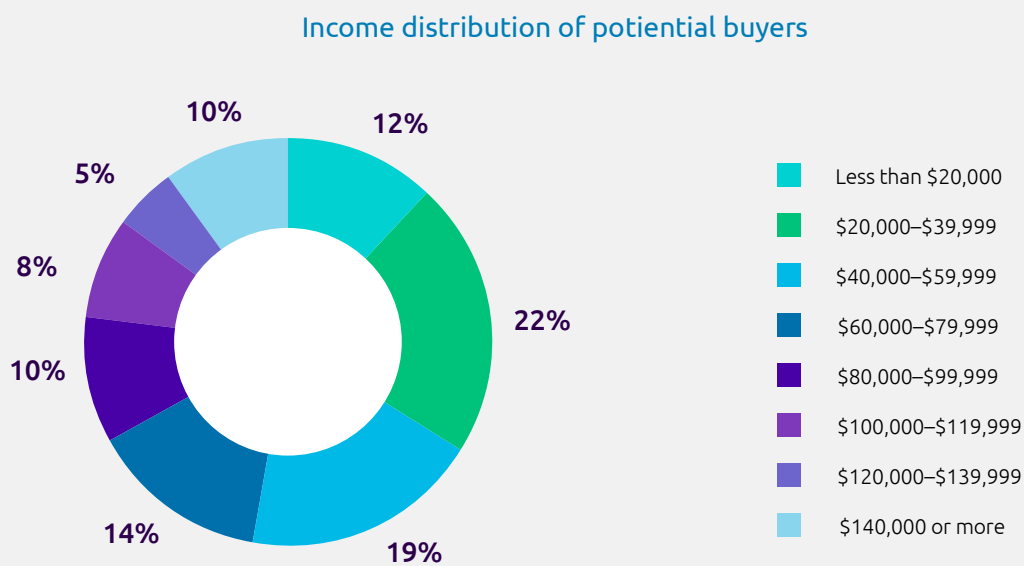
#### Age distribution of potential buyers



**Source:** Capgemini Research Institute, Consumer Behavior Survey, April 4–8, 2020, N=3,900 consumers who are considering purchasing a new/another personal vehicle in 2020.

Close to half (47%) of potential buyers have income above USD 60,000:

**Figure 6:** USD 60,000 is the median income for potential buyers



**Source:** Capgemini Research Institute, Consumer Behavior Survey, April 4–8, 2020, N=3,900 consumers who are considering purchasing a new/another personal vehicle in 2020.

We analyzed the income distribution and accounted for the purchasing power for each country. Our analysis revealed that potential buyers in India and China earn more than the average population, while potential buyers from the US, the UK, Norway, Sweden, and Germany earn significantly more than the national average. Only potential buyers from Italy, Spain, and France earn less than the national average.

**The current pandemic is driving younger age groups to own a car, a key reversal of their historical preference**

The current pandemic has the potential to reverse long-term ownership trends for digital-native consumers. Younger generations of consumers have lower levels of car ownership compared to earlier generations. In our survey, 36% of consumers aged 18–24 currently do not own a car, compared to 20% of the entire survey sample.

- Among this group, 85% have never owned a car
- Among the 25-35 age group, 79% have never owned a car.

However, this trend is likely to reverse due to the COVID-19 pandemic:

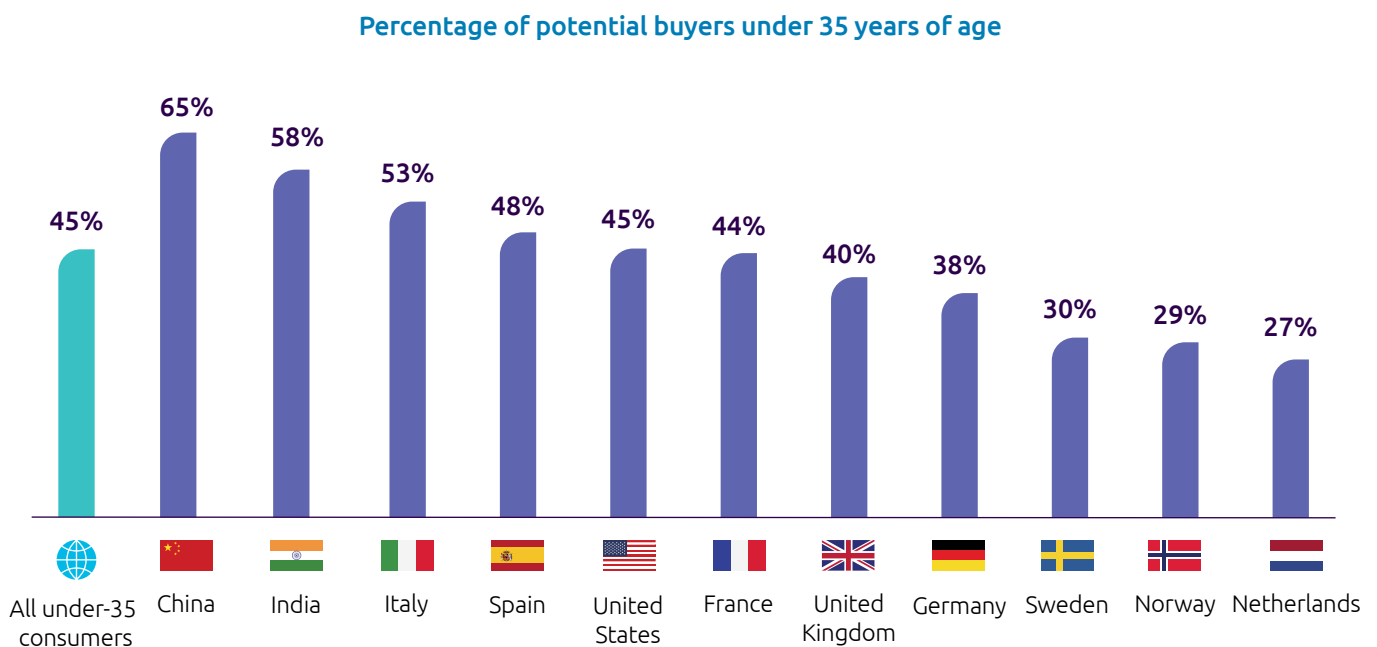
- Thirty-five percent of all consumers are considering buying a car in 2020. However, the younger age groups are showing a stronger preference for ownership: as we see in Figure 7, 45% of people under 35 are considering buying a car.
- Two in five of the 18 to 24-year-olds in our research have used personal cars as their most used/most regular mode of transport. However, over the next six to nine months, 30% aim to use a car that they own as the most used/most regular mode of transportation.
- A key trend driving this shift is a move away from public transport and ride-hailing:

- Half of under-35s aim to use public transport less often and take their car more often in the future
- Forty-four percent of under-35s will make less use of ride-hailing due to health and safety concerns.

*environmental impact especially in urban areas where public transport is perceived as easier for daily travel. So automotive firms looking to tap into this demand must offer greener, hassle-free and high-quality services bundled with the car purchase. For instance, flexible payments options with better rates for greener cars such as EVs, over-the-air upgrades, vehicle pick-up and drop-off for maintenance, among others."*

According to Dr. Johan Jansson, *"Younger consumers historically disliked car ownership for its hassles and*

**Figure 7:** The younger demographics, across countries, are considering owning a car



**Source:** Capgemini Research Institute, Consumer Behavior Survey, April 4–8, 2020, N=1,715 consumers. People who consider buying a car have selected “Strongly considering” or “considering” to the question: Are you considering purchasing a new/another personal vehicle in 2020?

***Younger consumers are deferring purchase due to affordability issues***

We found that 49% of consumers who are not considering buying a car this year say it is because they cannot afford to do so. Among the 18-24 and 25-35 category, this share rises to 57% and 51%, respectively. This number is likely to grow if the pandemic and economic shutdown are prolonged. Automakers must ensure that they provide incentives and relief programs to consumers to deal with the financial pressures brought on by the economic effects of lockdowns.



## Actions for automotive organizations

- **Develop targeted offerings for younger consumers.**

Introduce short-term subsidized leasing for younger consumers. This will help them tackle the short-term need for a vehicle while positioning them on the path to long-term ownership. OEMs will also need to market their products to this younger demographic differently – for example, by making greater use of social media platforms and ensuring a high-level of personalization. Younger consumers have strong expectations of car technology and infotainment that OEMs will need to address.

- **Introduce flexible payment models.** To adapt to consumer needs and requirements, automotive organizations can provide more options for short-term leasing, subscription, variable time offerings and pay-to-use. These flexible payment offerings should be strongly supported by digital channels.

- **Adapt the product portfolio to emerging consumer demands.** With limited production facilities – along with supply chain constraints – OEMs need to adapt their portfolio and inventories based on today's market requirements. Lower-priced options along with health features should be emphasized without creating large inventory and risking a second COVID-19 outbreak among supply chains. Offering less variety (e.g., in models, colors, features) and choice of vehicles can help build resilience in the supply chain in the short to medium term.

- **Automotive organizations can take steps to ensure that consumers are financially supported through these uncertain times:**

- **EMI waiver.** Hyundai America has extended its “Assurance Job Loss Protection” program, which was initially conceived during the 2008 global financial crisis. The company makes up for six payment instalments for people who lose their job due to the current pandemic.<sup>9</sup>

- **EMI deferments.** Ford launched its “Built to lend a hand” program in early April. Customers ready to purchase a 2019 or 2020 model Ford will receive three months of payment from Ford automatically and can choose to defer another three months of payment to a later date.<sup>10</sup>

- **Extend vehicle leases to compensate for lockdown periods.** Ford, Toyota, Nissan, and GM are all offering lease extension and payment deferment for lease vehicles.<sup>11</sup>

- **Emphasize and clearly communicate on hygiene factors, ensuring your products address the concerns of consumers.** As we have seen, consumers are even willing to pay a premium for health and wellness features. Examples would include retrofitted air filters, HEPA filters, ambient air quality indicators, health monitoring of passengers, and use of UV LED lights for sterilizing vehicle interiors. Geely – the Chinese OEM – added an Intelligent Air Purification System (IAPS) for all 2020 models. This system filters out all particulate matter along with a negative ion generator to sterilize and deodorize against viruses, bacteria, fungi, and molds.<sup>12</sup>

- **Reassure consumers on hygiene-related concerns.**

Automotive OEMs should have a strong action and implementation plan for dealers to address consumer concerns about physical visits. This should include actions such as booking appointments for visits in advance through digital channels, sanitation and hygiene procedures for test vehicles, along with mandated sick leaves for any dealership employees who fall ill. These steps should also be proactively communicated to consumers to alleviate their concerns. Services such as regular disinfecting of car interiors and the vehicle's air conditioning will also see high demand. Guangzhou Automobile Group in China is testing a system to perfume one of its SUV models with the aroma of traditional Chinese medicine.<sup>13</sup>

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**HALF OF UNDER-35 CONSUMERS  
AIM TO USE PUBLIC TRANSPORT LESS  
OFTEN AND TAKE THEIR CAR MORE  
OFTEN IN THE FUTURE**

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## Consumers want to minimize dealer visits and make more use of online channels

### Consumers prefer interacting with digital dealerships

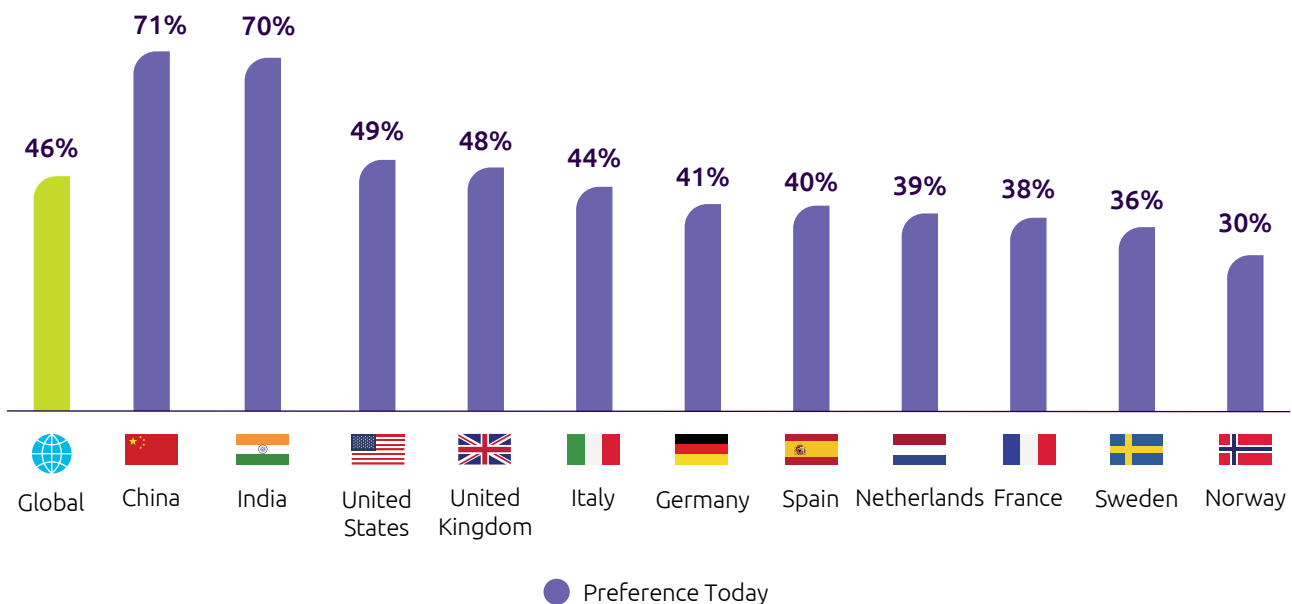
Compared to pre-COVID levels, consumers have made a significant shift to digital modes of interaction. *“We had experienced a very sharp uptick in the number of digital inquiries we are getting,”* said RC Bhargava, chairman of India’s largest automotive OEM – Maruti Suzuki. *“More and more customers, because of the fear of contracting COVID-19 and this social distancing, will try and see how they can make maximum use of technology to buy car.”*<sup>14</sup>

Our survey found that:

- Forty-six percent of consumers prefer to avoid visiting dealerships today to compare financing and deals (see Figure 8). Complying with lockdowns and social distancing measures could be a major driver of this.
- Fifty-two percent of potential buyers today prefer to use only search online to search for information about vehicles. This was forty-four percent before the COVID-19 outbreak.

Figure 8: Consumers intend to minimize visiting dealerships due to COVID-19

### Percentage of consumers who would prefer to avoid dealership visits to compare financing and deals



Source: Capgemini Research Institute, Consumer Behavior Survey, April 4–8, 2020, N=11,281 consumers. Percentages denote people who have selected 5 and above for the following question: Please rate the following statements on a scale of 1 to 7, where 1 = “Strongly disagree” and 7 = “Strongly agree” for your personal vehicle preferences: I will avoid visiting vehicle dealerships to compare financing or deals.

### How a focus on digital innovation and consumer safety is helping Tesla tackle the COVID-19 impact

Tesla – the American electric vehicle manufacturer – is combatting the effects of the COVID-19 pandemic with digital innovation and consumer-centric health initiatives. The digital and product innovations it has implemented include:

- Tesla has long advocated for digital sales with retail showrooms focused on product experience. Tesla moved to an online-only sales version in 2019,<sup>15</sup> enabling it to transition an important part of the consumer journey to digital.
- Consumers can access information and order products, with customization and financing options from Tesla's website, without the need for human intervention.
- Documentation for registration can be uploaded to Tesla's website. Tesla then handles vehicle registration on the consumer's behalf and the documents are made available for download.
- Tesla has strong, digitally enabled support using chatbots, phone service, and email to ensure that all queries are addressed without the need for dealership visits.
- Cars can also be delivered to the doorstep via "contactless delivery". This feature uses the owner's smartphone app, with no exchange of keys needed.

Tesla is well-known for its emphasis on product safety. This includes HEPA filters as well as, bacteria and odor prevention. Tesla's cars are known for their high safety ratings from both European (NCAP) and American (NHTSA) agencies.<sup>16</sup> Retail operations in China after the lockdown have emphasized public safety, with all visiting customers having their temperature checked, and display vehicles being thoroughly sanitized.<sup>17</sup> These digital and health-related initiatives have helped Tesla capture one-third of the EV market in China once the COVID-19 related lockdowns were eased.<sup>18</sup>

### Actions for automotive organizations

- **Provide a best-in-class digital experience.** With closed showrooms, and many consumers in lockdown, potential buyers have very limited options to explore and experience vehicles. Walking into a showroom and interacting with salespeople now needs to be replicated in digital form:
  - Virtualize the sales process. BMW has started an online digital showroom in China that is integrated with WeChat. This enables consumers to interact with BMW product experts. They can also interact with salespeople while being guided through a store – browsing cars and understanding pricing.<sup>19</sup>
  - As the Geneva International Motor Show 2020 was cancelled owing to the COVID outbreak, BMW moved most of its intended program online. This included the world premiere of its BMW Concept i4 at a live-streamed press conference.<sup>20</sup>
- **Accelerate the digital transformation of dealerships.** Volkswagen in China conducted a three-day online training course on digital channels for 50,000 salespeople across thousands of dealers.<sup>21</sup> This ambitious program, in partnership with Taobao University, trained staff on social media use, video creation, live-stream events for cars, and feature presentations to reach customers at home. On March 9, Chery – a leading automaker in China – launched its newest model – the Tiggo 7/ 7 PRO – exclusively via live stream. According to the official data, this online event attracted more than 700,000 viewers, and delivered more than 7,000 sales leads, exceeding Chery's expectations.<sup>22</sup>

- **Offer a contactless customer experience for test drives, deliveries and maintenance.** We found that 39% of consumers currently expect at-home services – such as vehicle pick-ups and drop-offs – during vehicle servicing. In early March 2020, Tesla started offering “zero-contact” test drives and car deliveries to its customers in China. It then rolled out this service to its US customers.<sup>23</sup> All transactions – including payment and paperwork – can be done online. And, the car itself can be unlocked via the Tesla app once it is dropped off at the customer’s chosen location. Online used-car sales companies – such as Carvana and Shift in the US – are offering test drives and deliveries while adhering to social distancing norms.<sup>24</sup>
- **Use emerging tech such as AR/VR and voice interfaces to offer a superior customer experience.** Our survey found that 35% of consumers prefer an online VR/AR-based car walkthrough before purchase. In addition, 38% of consumers prefer more voice controls in their vehicles, up from 33% before the outbreak started.

## Conclusion

The COVID-19 pandemic is profoundly changing automotive consumer behavior. Health and hygiene become more important as consumers steer towards individual mobility over public and shared modes of transport. Younger age groups are finally warming up to the idea of owning a vehicle. Digital transformation of the buying process becomes more important than ever to build and sustain connections with consumers in the age of lockdowns and social distancing. Organizations already at the forefront of offering a digital customer experience, and innovative business models such as subscription and pay-per-use, are finding themselves well placed to weather this storm. They offer valuable lessons to the other organizations on how to leverage the consumer shift as an opportunity to shore up consumer demand even amid a global slowdown of the industry.

*This document is part of the Capgemini Research Institute’s special series of research notes on pragmatic tips to help organizations tide over the COVID-19 pandemic. You can find more such research notes and other tips and analyses at : <https://www.capgemini.com/our-company/covid-19-insights-for-today-and-tomorrow/>*

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