

Shifting gears: COVID-19 and the fast-changing automotive consumer

The automotive industry is no stranger to major change and disruption. Trends such as shared and electric mobility were already causing significant change even before the disruption of the COVID-19 pandemic. The pandemic has shifted consumer preferences again, making it critical to understand which changes will endure over the medium term. To get to the pulse of consumers during these uncertain times, we have updated our earlier April 2020 research in this note.

In our April report, [COVID-19 and the automotive consumer: How can automotive organizations re-engage consumers and reignite demand?](#), we found that consumers were increasingly preferring personal vehicles, health and hygiene features in cars, and digital modes of interaction throughout the purchase cycle. In many markets, sales of cars rebounded in March and April,¹ spurred by pent-up demand, supportive governmental policies, growing preference for personal mobility, and an improving economic outlook. But the recovery is only partial – car sales were still down year over year in recent quarters.² Concerns over public and shared mobility are likely to persist however, as countries set up the infrastructure and technical support required to administer the vaccine for COVID-19.

With research taking place in November, we have now gone back to consumers to understand which trends are being sustained over the long term, what new trends are emerging, and how automotive companies can respond effectively. We reached out to 11,000 consumers from 11 countries: the US, the UK, France, Germany, China, the Netherlands, Sweden, Norway, Italy, Spain, and India. These countries together represented 62% of global annual passenger vehicle sales in 2019.

This research note outlines the key long-term and sustained trends that continue to drive the industry:

- 1. Mobility preferences continue to shift towards personal means of transport.** Consumers are still avoiding public or shared transport and favoring private vehicles to fulfill their travel needs. This is driven by falling expectations of a return to the status quo once the pandemic subsides. Safety concerns are also driving preferences for in-car health and wellness features and touchless interactions.
- 2. Purchase appetite has continued to grow over the last few months in almost all markets.** In April, 35% of consumers expressed interest in buying a car; in November, this stood at 46%. With multiple COVID-19 waves and emerging new mutations, coupled with renewed lockdown restrictions, consumers prefer personal mobility over shared or public transport.
 - **Driven by economic concerns stirred by the pandemic, a large segment of consumers have lowered their expectations regarding the car they intend to buy.** However, a sizeable segment now wants a more premium experience from their cars than what they were planning earlier – and they are demanding a more engaging driving experience (21%). This is true probably because consumers now use their personal cars more than before the pandemic and they use them for longer distances.

- 3. Consumer expectations of a digitally driven experience has increased.** They want seamless low-touch interactions across the lifecycle: searching for information, exploring features, financing, delivery, engagement with the car, and aftersales. Nearly half of consumers now prefer online channels to find information about cars, up from 39% before the pandemic, and growing from 46% in April 2020.

In this research note we examine these three trends divided into chapters in subsequent pages and look at what automotive organizations can do to manage any risks and capture the upside of emerging opportunities.

21% THE SHARE OF CONSUMERS THAT WANTS A MORE PREMIUM EXPERIENCE (HIGHER-END CAR, MORE FEATURES) FROM THEIR CAR THAN WHAT THEY WERE PLANNING BEFORE THE PANDEMIC.

1. Consumers' anxiety about safe travel has altered urban mobility patterns

More consumers today favor personal mobility and avoid carpooling/public transport/ride-hailing services compared to April 2020

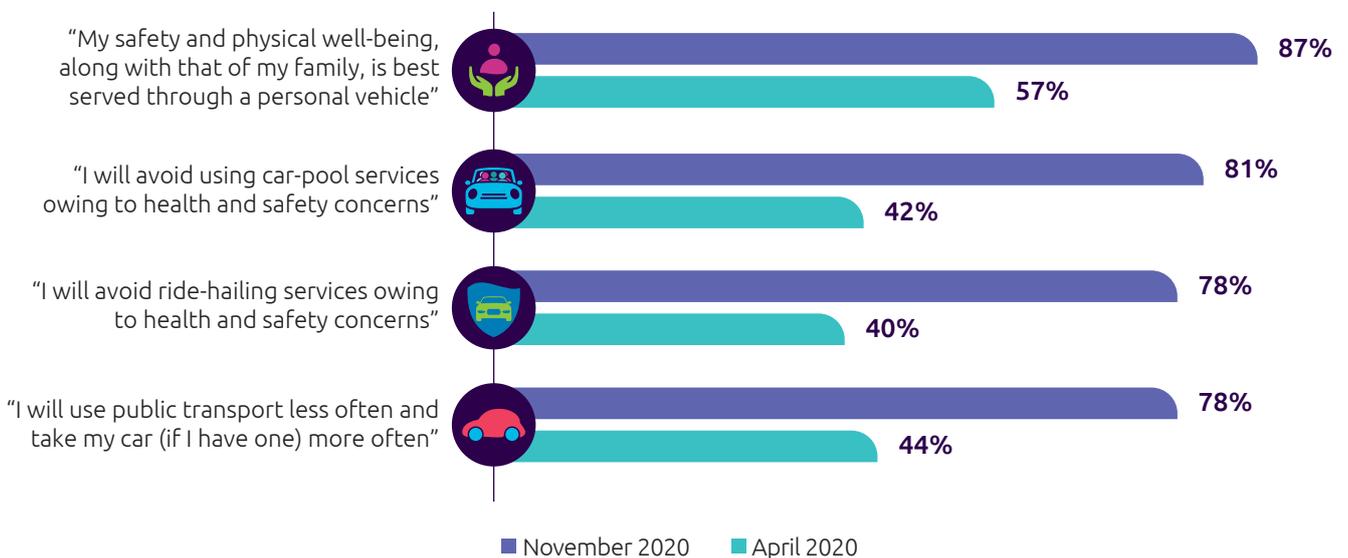
Consumers are deeply concerned about the risk of catching a contagious disease while traveling. The pandemic has lasted longer and impacted consumers more than they expected. For example, research shows that at the onset of the pandemic,

consumers in the US expected normalcy to return by August. By November, they did not expect a return to normal until July 2021.³ As a result, consumer perceptions about public transport have altered significantly.

Although multiple vaccines against COVID-19 have been launched, administering them worldwide will take time as countries prepare the distribution and technical infrastructure required to reach end consumers. Meanwhile, the advent and spread of a mutation of COVID-19 will also keep consumers from opening up to shared and public mobility options for an indefinite period. As Figure 1 shows, the vast majority say that their safety and physical well-being, along with that of their

Figure 1: Consumers' preference for a personal vehicle and avoidance of shared mobility options significantly jumped in the last six months

Consumers' mobility preferences



Source: Capgemini Research Institute, Consumer Behavior Survey, October 27-November 5, 2020, N=10,094 consumers.

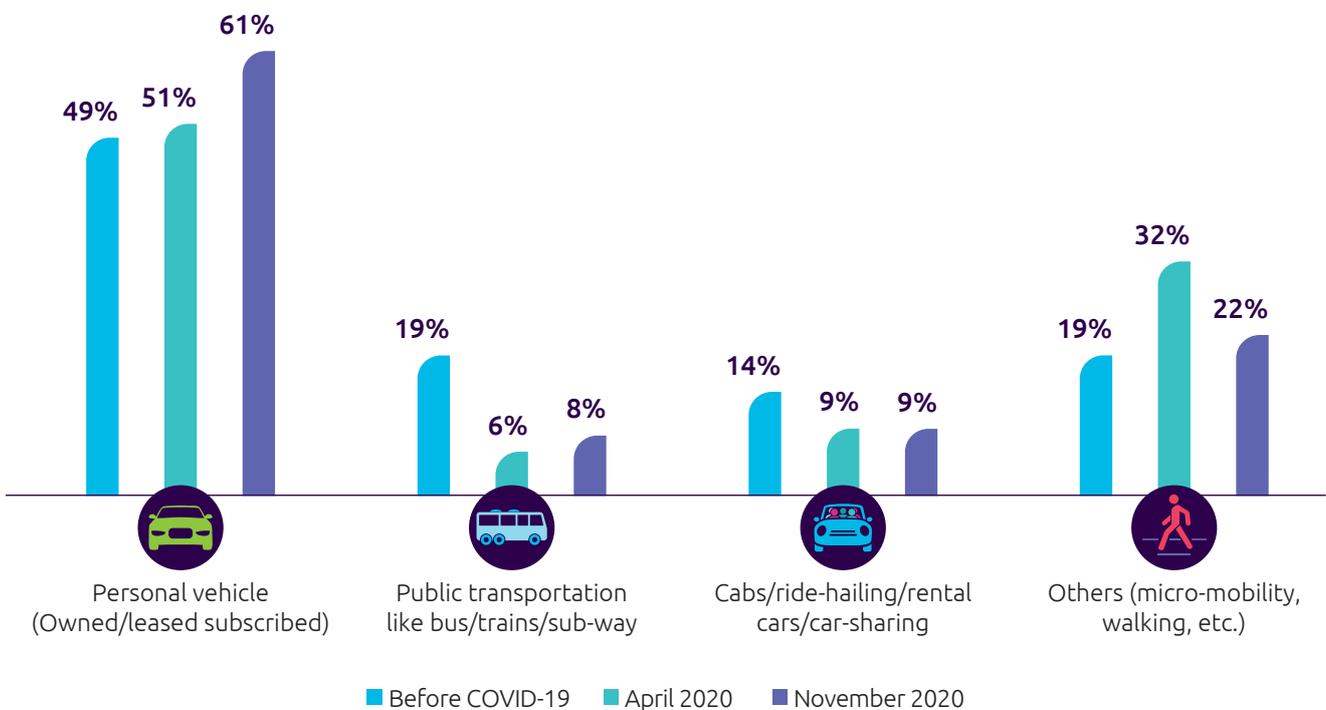
family, is best served by a private car (87%, compared to 57% in April).

While the result reflects the timing of our survey in late October–early November – which coincided with a resurgence of the virus in many parts of the world and fresh lockdown

restrictions – the shift in mobility preferences is likely to last. Use of personal vehicle has surged at the expense of public or shared transport. Almost 72% of consumers said that they value constant access to a private vehicle more than before the pandemic. This sentiment has remained true even as infection rates fell between April and November, and

Figure 2: Use of private cars grew at the expense of public and shared transport

What is your most used mode of transportation before COVID-19 and currently?
(A comparison of personal and shared/public transport)



Source: Capgemini Research Institute, Consumer Behavior Survey, October 27–November 5, 2020, N=10,094 consumers. Micro-mobility includes e-bikes, cycles, e-scooters, etc..

72% OF CONSUMERS SAID THAT THEY VALUE CONSTANT ACCESS TO A PRIVATE VEHICLE MORE THAN BEFORE THE PANDEMIC.

authorities declared public transport options safe provided precautionary measures were followed.

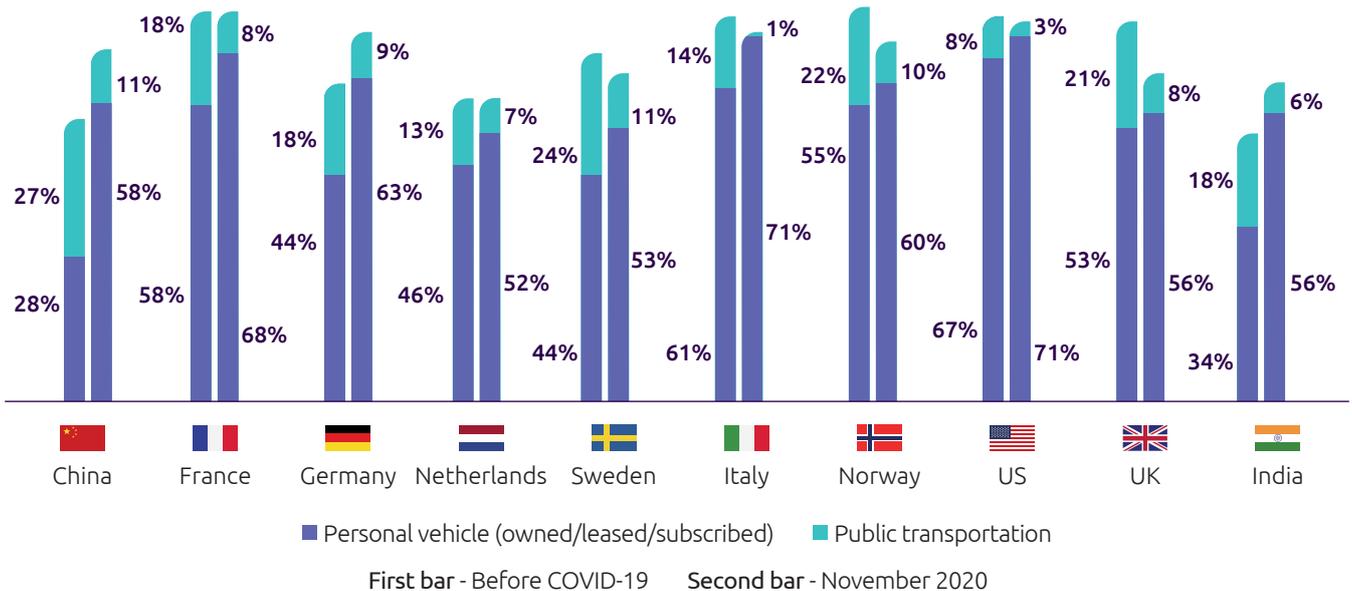
Emergence of micro-mobility: Around half of the consumers said they would prefer micro-mobility options, such as e-bikes and electric scooters, if available. In response, city planners are expanding the infrastructure for pedestrian spaces and bike lanes to make these options safer and more convenient.⁴ While the private car will likely remain the first choice for people's commute, micro-mobility and walking will continue to emerge as stronger alternatives for last-mile connectivity.

In countries such as Italy and the US, the preference for private vehicles over public transport is the most pronounced (see Figure 3):

- For example, in Italy, before the pandemic, 61% said they used cars and 14% public transport.
- Today, 71% favor cars and only 1% still favor public transport.

Figure 3: Around the world, consumers increasingly prefer private cars compared to public transport to meet their mobility needs

Mobility preferences by country (before COVID-19 vs November 2020)



Source: Capgemini Research Institute, Consumer Behavior Survey, October 27–November 5, 2020, N=10,094 consumers.

50% OF CONSUMERS WOULD PREFER MICRO-MOBILITY OPTIONS, SUCH AS E-BIKES AND ELECTRIC SCOOTERS, IF AVAILABLE.

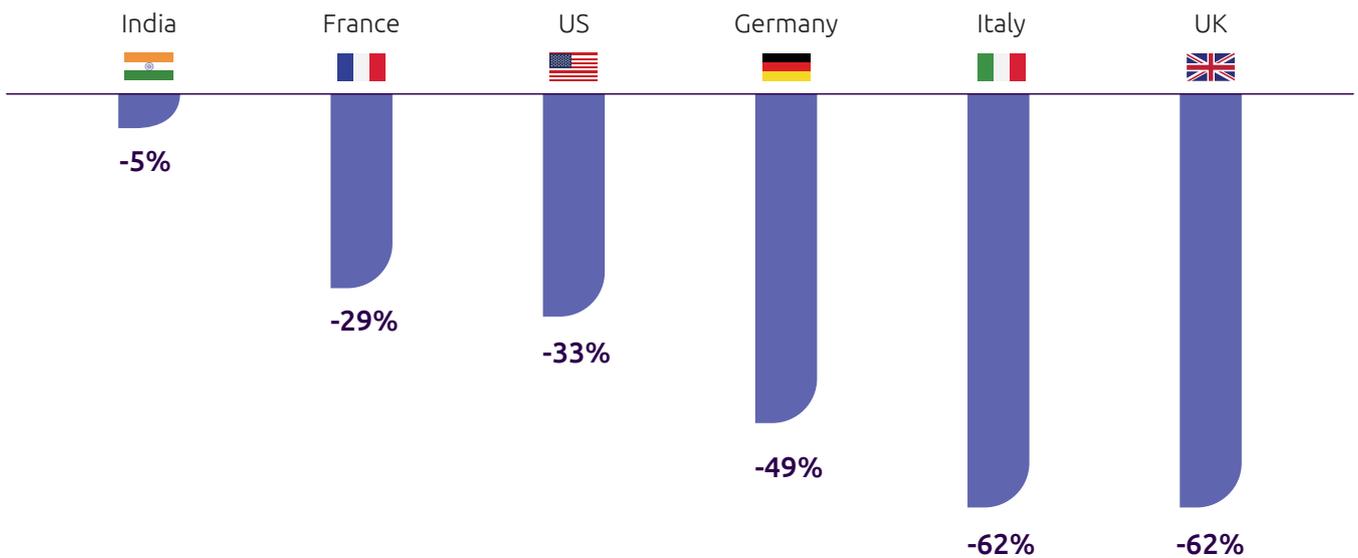
Consumers in China, India, and Germany show the most pronounced shift in terms of how sentiment has tilted to cars over public transport compared to before the pandemic.

Passenger vehicle miles traveled (VMT)* surged even as people used less public transport: In countries such as France, Italy, and Germany, and the UK, VMT rebounded to greater than or equal to the pre-pandemic levels during the period between June to November (before the lockdowns were reimposed in some of these countries).

Among these countries, passenger traffic was around 125% on average, compared with March this year. By contrast, in the US, VMT have remained within 85% of the levels during July to November; this means that the level of travel/commute did not fall in US as much as it did in Europe.⁵ Public transport including subways, bus and train station traffic is still well below the pre-pandemic levels (see Figure 1). While overall car usage have declined due to shelter-at-home orders, consumers are taking longer trips during the weekends.⁶

Figure 4: In major car markets, use of public transport has remained significantly lower than pre-pandemic levels

Use of public transport, including subways, bus, and train stations
(change between Jan–Feb 2020 and January 2021)



■ Change from baseline (5-week average from 3 January to 6 February, 2020)

Source: Google, COVID-19 Community Mobility Report, January 2021.

* Total miles traveled by passenger vehicles in a given period.

Increased appetite for hygiene and wellness features

Consumers increasingly want health and wellness features and touchless interactions:

- 85% want cars that offer health and wellness features (air filters, ambient air quality indicators, health monitoring of passengers, and use of UV LED lights for sterilizing vehicle interiors), up from 49% in April 2020.
- 80% prefer using tech-based solutions to interact with dealerships, such as salespeople providing remote assistance during a purchase, or a technician during servicing/maintenance.

Organizations are also looking to meet demand for sterilization technologies to improve car hygiene:

- Groupe PSA-owned car brands, including Citroën, Peugeot, and Vauxhall, offered paid deep cleaning services to reduce the risk of infectious particles in cars.⁷
- Hyundai Motor Group is exploring the use of ultraviolet rays to sterilize its vehicles when no passengers or drivers are inside, with a particular focus on high-touch interiors such as floor mats, steering wheel, and door handles.⁸
- Geely, the parent company of Volvo, recently unveiled its Icon electric crossover SUV equipped with an air-purification system to combat COVID-19. The equipment will be able to remove airborne viruses and other pathogen to achieve the same level of air filter as an N-95 respiration system.⁹
- Tata Motors rolled out health and hygiene accessories such as air filters, sanitization kits, and services such as vehicle air and surface disinfectants at its service centers.¹⁰

Actions for organizations to address emerging mobility needs:

- **Address emerging micro markets with targeted offers:** The relationship between consumers and their cars is changing. For some, it is an extension of their home – a safe and convenient place to be. For others, it is seen more as a utility that allows you to take short trips. Automotive organizations need to be receptive to these emerging segments in each micromarket, assess the likely scale of these markets in the near future, and provide customers with customized/personalized offerings. For example, the used car market has experienced significant growth as consumers favor individual mobility. To capture this segment, companies are launching targeted subscription plans. As Steffen Knapp, Director of Volkswagen Passenger Cars India, stated, *“India is bound for individual mobility ... and we also have a tendency towards leasing and subscription. We see this [market] doubling and even tripling. It’s a massive phenomenon in the world, like in the US and Europe.”*¹¹
- **Continue to add/expand hygiene-related offerings to alleviate customer concerns:** Hygiene-related factors assumed new importance in the last six months. Carmakers need to include the features and services that will attract this hygiene-conscious segment and improve the value proposition of their cars during the pandemic. Automakers such as Toyota are offering free car disinfection when customers get their car serviced at dealerships.¹² Hygiene services and features are particularly valuable for fleet customers to allay fears of customers in using ride-sharing and car-sharing options.

80% OF CONSUMERS PREFER USING TECH-BASED SOLUTIONS TO INTERACT WITH DEALERSHIPS, SUCH AS SALESPEOPLE PROVIDING REMOTE ASSISTANCE DURING A PURCHASE, OR A TECHNICIAN DURING SERVICING/ MAINTENANCE.

2. More consumers want to purchase a car than in April 2020

Consumers are more likely to be looking to buy a car today. Currently, 46% have expressed interest in buying a car – up from 35% in April. The need for personal mobility has grown as the pandemic is lasting longer than most people expected. Buying appetite has grown globally in almost all markets, driven by a combination of:

- Avoidance of public or shared mobility
- Pent-up demand for cars following the economic recovery after a subdued period at the onset of the pandemic
- Low-cost auto loans

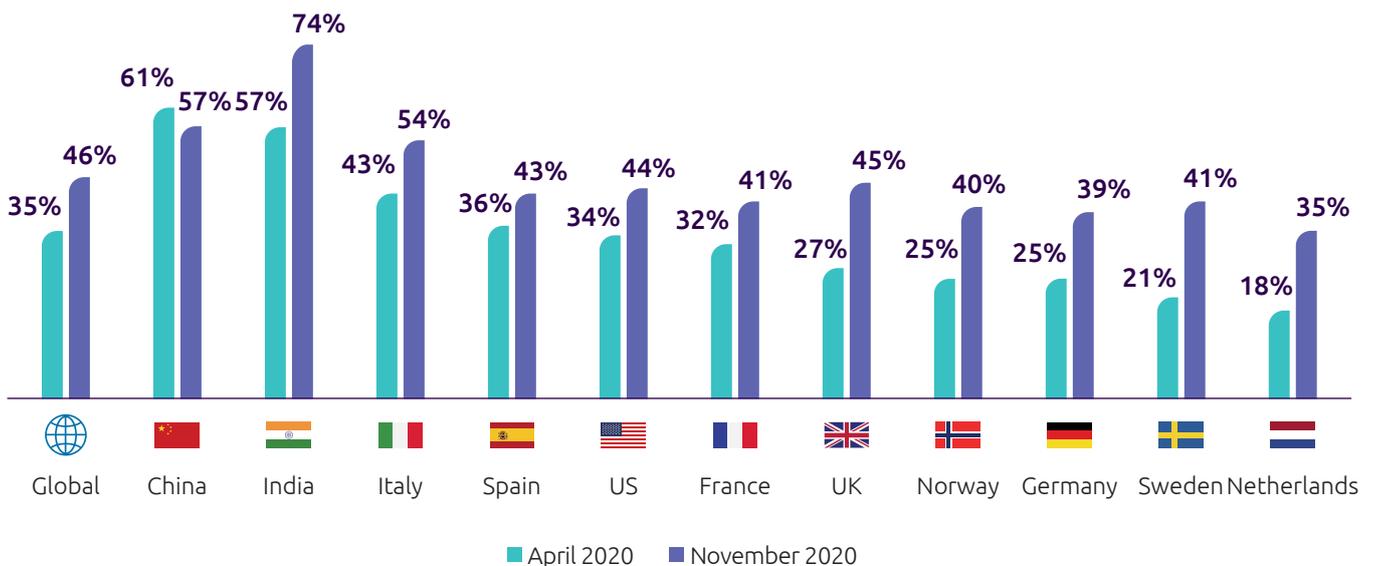
- Government incentive programs to take more polluting cars off the roads – and replace them with a new and cleaner vehicles, including EVs – has boosted demand in areas such as US and Europe.

Consumers in China and India showed the strongest appetite for buying a car in the next 12 months. Year-over-year car sales in China have grown consecutively in four months up to October.¹³

In the EU and UK, consumers are offered purchase subsidies and tax incentives for EVs – ranging from EUR5,000 in France to EUR9,000 in Germany. As a result, the EV market share of Europe and the UK is expected to grow to 31% of world EV sales next year, up from 22% currently (and mostly taking share from China).¹⁴ Automakers will need to tap into the growing demand for EVs in the European markets by developing locally relevant products.

Figure 5: 46% of consumers are considering buying a car in the next 12 months

Percentage of consumers considering buying a car in the next 12 months

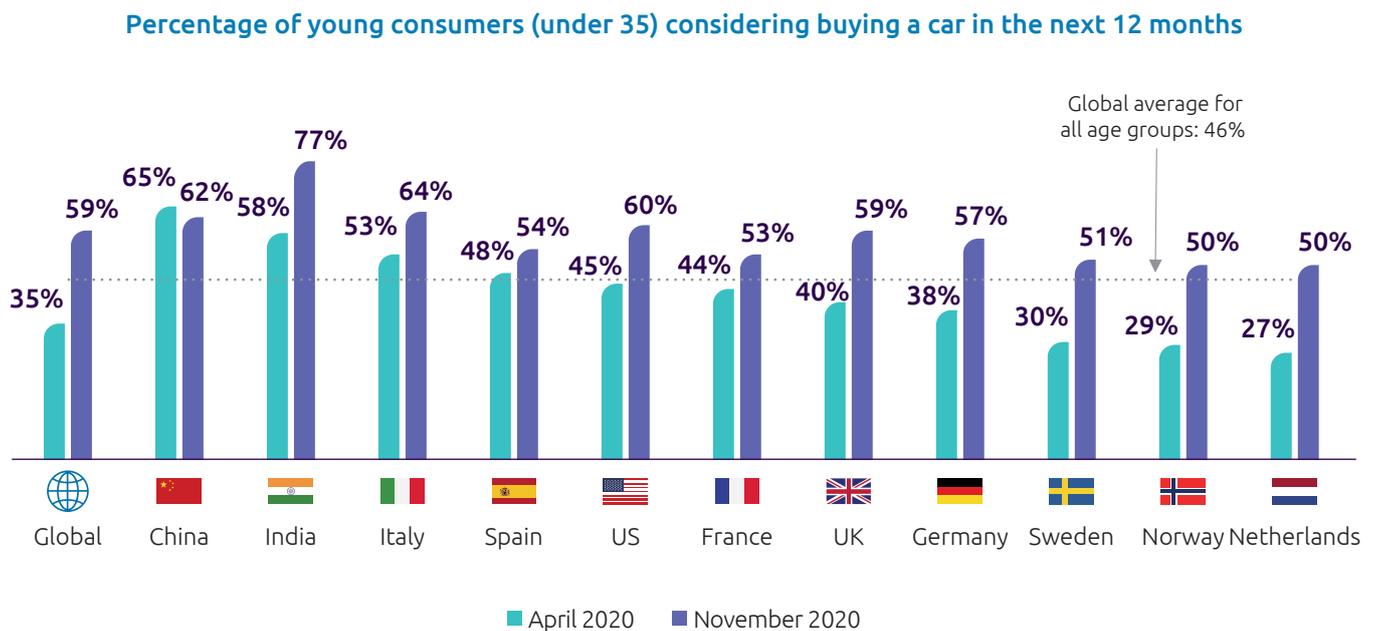


Source: Capgemini Research Institute, Consumer Behavior Survey, October 27–November 5, 2020, N=11,108 consumers.

Younger consumers continue to demonstrate a greater interest in buying a car. Among younger consumers (aged 18–35), 59% are considering buying a car, compared with 46% overall. A lot of this demand is due to first-time car buyers who prefer personal mobility instead of using public transport. India’s leading carmaker, Maruti Suzuki, experienced a 5% increase in first time car buyers, to 48% of all its car buyers in 3Q20.¹⁴ This demand is for utility and functionality rather than the aspirational value of the car. Shashank Srivastava, Head Marketing & Sales at Maruti Suzuki India, says, *“We believe is that there has been a turn from the conspicuous consumption to more conscious spending. And therefore, there is more functionality buying rather than aspirational buying.”*¹⁶

Similarly, for Volkswagen, 60% of car sales in China in April 2020 came from first-time car buyers. *“We have seen interest from a new kind of customer, those keen to own a personal vehicle to escape the risks of infection on public transport,”* said Stephan Wollenstein, CEO, Volkswagen Group China.¹⁷

Figure 6: 59% of younger consumers are considering buying a car, up from 35% in April 2020



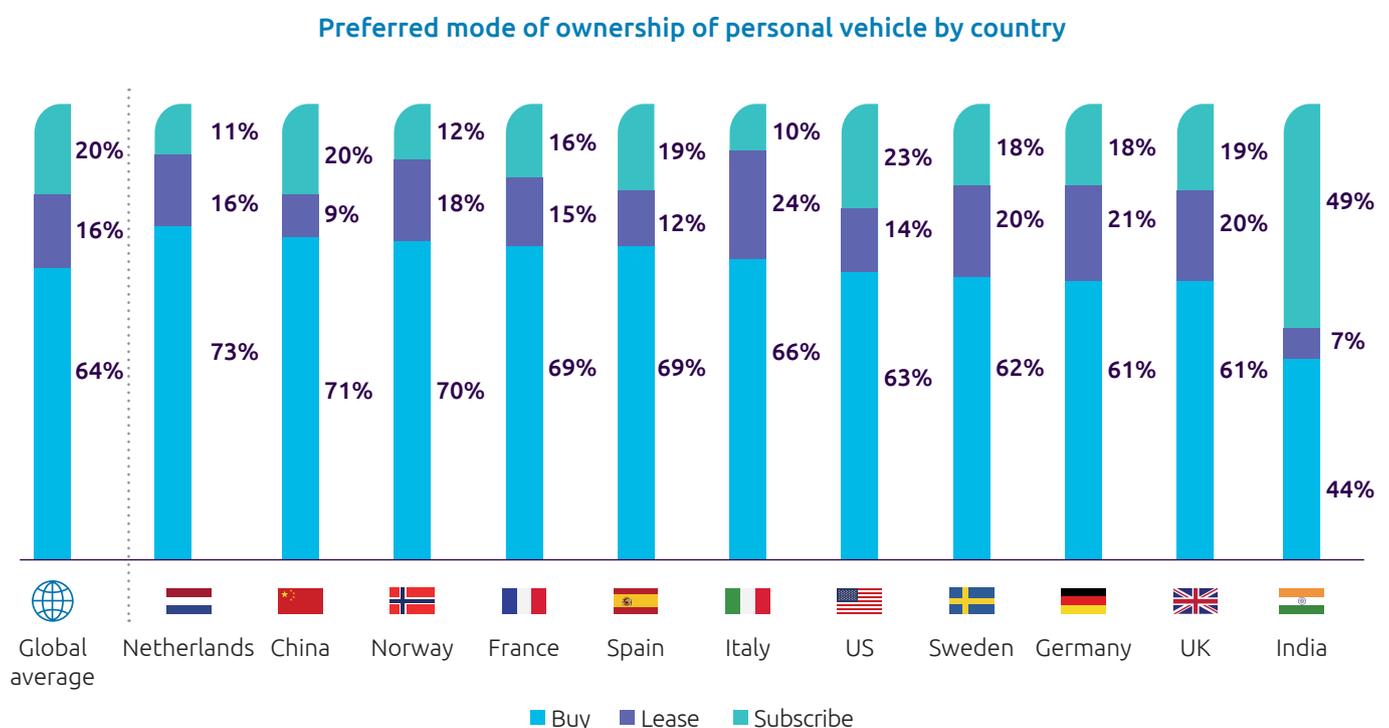
Source: Capgemini Research Institute, Consumer Behavior Survey, October 27–November 5, 2020, N= 3,627 young consumers.

Over a third of consumers want to subscribe or lease a car rather than buy it

The pandemic has focused more attention on infection risk, and this is changing the way that people think about accessing a car for mobility. With a car subscription, for instance, consumers enjoy a short-term and economical solution to their mobility needs while enjoying the protection from infection that a car offers over other mobility options.

- Globally, one in five consumers (20%) have said they will subscribe to a car and 16% prefer to lease one. Those who prefer to subscribe a car liked the flexibility to easily switch into a different vehicle category (SUV during winters, and convertible during summers, for example) the most.

Figure 7: More than a third of consumers globally prefer to lease or subscribe to a car instead of buying

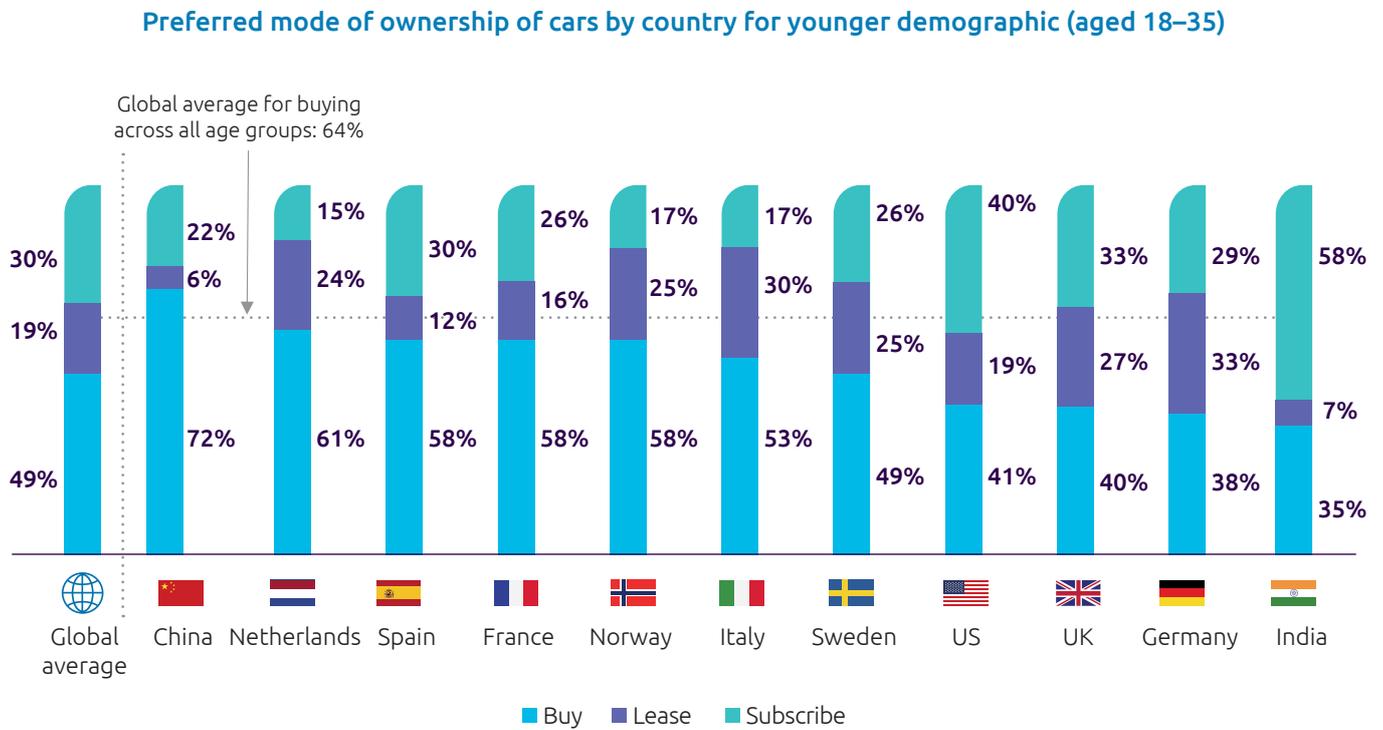


Source: Capgemini Research Institute, Consumer Behavior Survey, October 27–November 5, 2020, N=10,094 consumers.

Subscription services are popular among younger consumers who might not be able to afford a big-ticket payment but want to drive newer car models. Volvo launched a subscription service in the UK recently, allowing drivers to subscribe online and have the car delivered to them.¹⁸ Customers can even rent it out further by sharing a digital key. The company is targeting young consumers and those living in cities who do not need regular access to their vehicles.¹⁹

Consumers are using leasing or subscription as a bridge between today’s emerging EVs and a future where EVs are more established and also potentially cheaper. *“Consumers are concerned that EV technology isn’t quite ready yet, or that it’s going to be a lot cheaper in a couple of years,”* said Jonas Nahm, Assistant Professor of Energy, Resources, and Environment at the John Hopkins University. *“So, people are reverting to leases of hybrid or gasoline vehicles to bridge the current period in the hope that at the end of that lease they can make the switch to EVs.”*

Figure 8: Half of younger consumers prefer to lease or subscribe a car



Source: Capgemini Research Institute, Consumer Behavior Survey, October 27–November 5, 2020, N=3,266 younger consumers.

Consumers are gravitating to cheaper alternatives for car ownership

Among consumers who are considering buying a car, a majority of them (56%) would prefer a lower-end (a small-sized car or one with fewer or more basic features) car than they originally intended. This implies impending margin pressure on automakers, as more customers gravitate towards lower-cost options. Competition is likely to heat up in smaller-car/entry-level segments as automakers push for refreshed variants to cater to consumer interest.

Already, due to lower profitability, this segment has witnessed shakeout in some parts of the world. Groupe PSA in October 2020, reportedly ended the production of small city car,

Peugeot 108 and Citroën C1, citing limited profitability.²⁰ At the same time, companies with favorable economics are exploring entry into small-car segments. For instance, Chinese automakers are looking to enter emerging segments such as mini electric cars in Europe. *“A serious threat from China is likely in this segment and Europeans must gear up to meet it,”* according to David Bailey, Professor of Business Economics at the Birmingham Business School.²¹ Electric car maker Tesla also hinted at launching a compact vehicle in Europe with a focus on affordability.²²

A small but sizeable segment of premium car buyers is emerging

While the majority favored a lower-end car than originally planned during the pandemic, almost one in five car buyers preferred a premium experience from their car brand. With the growing trend towards personal mobility, consumers expect to drive more often and for longer distances than before. As such they want more premium features – such as more space, voice-based controls, or premium services at their disposal.

We analyzed the key characteristics of consumers who would prefer purchasing a premium segment or a more premium model of the car than what they intended before the pandemic:

- 39% are younger, aged 18–35, (compared with 33% of all consumers who intend to purchase a car).
- 57% are male (versus 49% overall).

- 23% earn over USD100,000 annually (compared with 17% overall).
- 61% are employed full time (versus 48% overall).

Targeting this premium segment of consumers can help offset some margin pressure in entry-level segments. Automakers are increasingly focused on delivering over-the-air updates or selling upgrades over the lifecycle of the vehicle. *“The growing number of connected cars provides for additional huge business opportunity, more than five million connected vehicles as of now growing to more than 20 million cars by 2025. Assuming a triple-digit annual payment value per paying customer and use of our services over an extended part of lifetime of our vehicles leads us to a target of EUR1 billion of EBIT by 2025,”* Ola Källenius, Daimler AG – CEO & Head, Mercedes-Benz Cars.²³

Actions for organizations to tackle new purchase preferences:

- **Develop targeted subscription and leasing plans for cars:**

In many countries, such as India, where appetite is high for subscriptions but the concept is very new, companies need to invest in developing the market. Maruti Suzuki – India’s largest automotive OEM by market share – launched its subscription services in September 2020 with features such as flexible tenure, zero down payment, and insurance and maintenance. Maruti plans to expand its proposition to 40–60 cities in the next two to three years.²⁴

Consumers are also interested in buying electric vehicles, but seem reluctant about an outright purchase. Companies are launching EV subscription services to allow them to try out these cars. Subscribers can swap, upgrade, or cancel the service any time.²⁵

- **Continue with customer incentives to stimulate demand:**

Carmakers can incentivize customers with attractive offers to make them buy a more premium version or a new car instead of a used one. In our survey, the top-three drivers for consumers considering a car purchase in the next 12 months were:

- Price discounts

- Easier financing options
- Protection from loss of income (such as insurance against default on monthly instalments) during the pandemic.

Ford Credit, the financial services arm of Ford, launched an assistance program for new car buyers who lost their job during the pandemic. It allows customers to return their Ford vehicle with an additional waiver over the trade-in value of the car.²⁶

- **Revisit product portfolio to target emerging customer segments:**

During the pandemic, newer customer segments have emerged with changed mobility needs and different perceptions of the utility of a car. For example:

- Customers who want a premium/large car to travel between cities in the absence of public travel options
- Employees relocating to the suburbs of big cities or even further afield have distinct needs and different perceptions of the value of cars
- Customers interested in an EV but unsure of making a final buying commitment
- Customers with raised expectations of a digitized experience, including information search, features preferences, and aftersales services.

3. Consumers are gravitating towards digital interactions

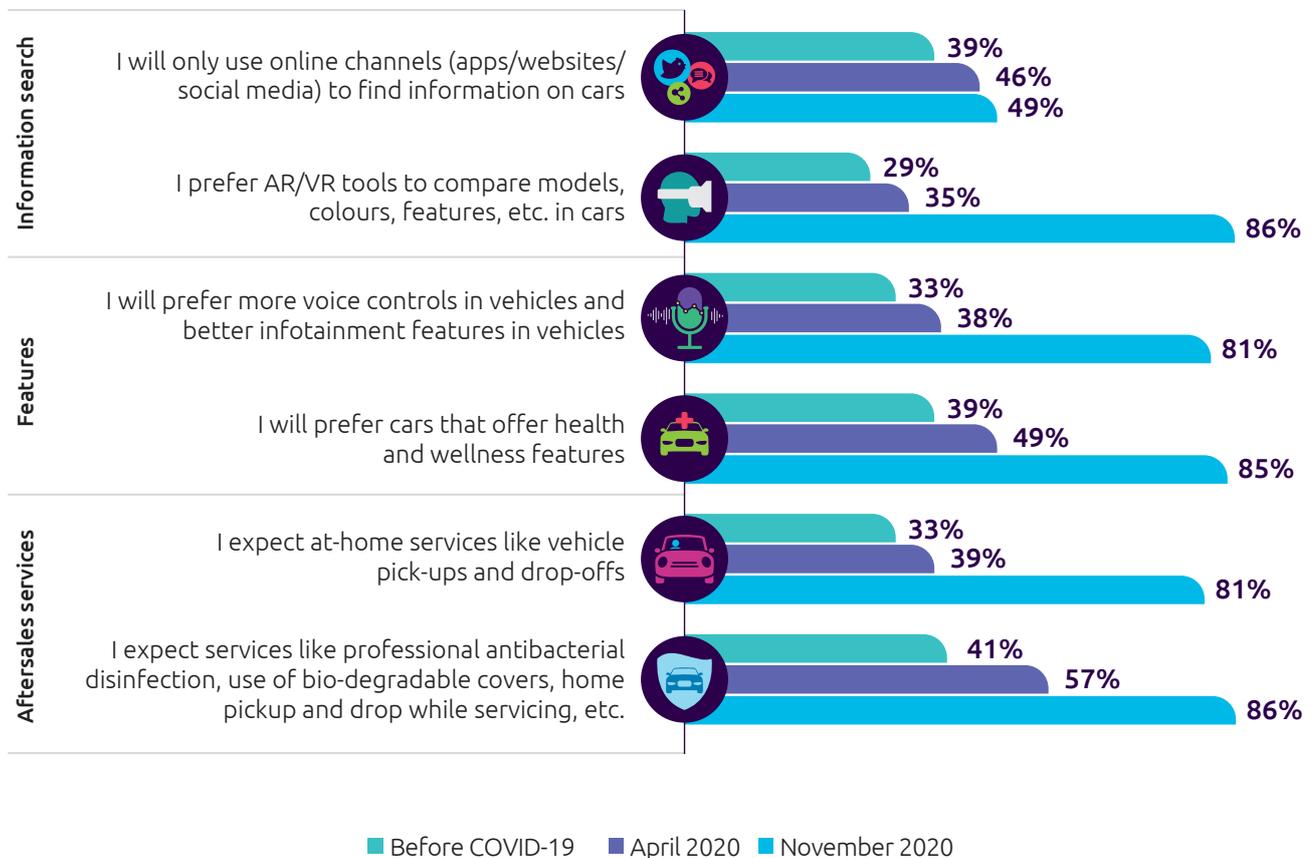
Digital interactions are becoming integral part of car purchase experience

As consumers struggled to visit dealerships due to lockdown restrictions, car manufacturers continued to develop a direct sales channel powered by digital. Customers are keen to use digital channels throughout the purchase cycle – from information search to aftersales (see Figure 9).

As Figure 9 shows, the trend of consumers going digital in the search for information about cars held up in November (49% said they would only use online channels for information compared to 39% before COVID). Use of AR/VR technologies has also surged. Audi, for instance, uses AR tech in its online car-buying platform. Customers can access 3D visual of the cars and configure them with available customization options.²⁷ Over half (55%) of the consumers also preferred explanatory videos for certain functions in the car and online/ touchless interactions.

Figure 9: Consumers increasingly prefer online channels of interaction

Consumers' digital preferences for automotive across aspects of purchase cycle



Source: Capgemini Research Institute, Consumer Behavior Survey, October 27–November 5, 2020, N=10,094 consumers.

- In the first half of 2020, Nissan sold nearly 12%, or 161,000 cars, where customers used its digital sales experience.²⁸
- Fiat Chrysler Automobile reported in October that around 45% of their monthly sales leads originated from the internet, up from 25% before the pandemic.²⁹
- During China's Singles Day (the world's biggest 24-hour online shopping event) in November, customers placed orders for 38,000 cars, up 158% year over year.³⁰ *"Chinese customers are much younger than those in other markets. They embrace high technology and expect more connected services,"* said Min Xie, a spokeswoman at Volkswagen.³¹
- 80% prefer in-person interaction with a sales representative at a dealership when closing the purchase. However, they prefer a more customized and digital dealer experience – almost 88% of consumers say that dealers should better customize the vehicle deal to suit their mobility or financing needs and choice of features.

Online sales are expected to account for around 25% of new car sales by 2025, up from less than 5% before the pandemic.³² In response, companies are revamping their digital presence, integrating multiple apps, introducing digital features, touchless interactions, capabilities for "over-the-air" updates and paid digital services. As Peter Wells, Professor of Business and Sustainability, Director of the Centre for Automotive Industry Research, Cardiff University, UK, told us, *"Consumers no longer have to actually go to dealers if your cars need service or repairs – they come to you, they provide you with another vehicle. They take that away, go away again. We've seen elements of those kinds of packages for some time now, but I think they'll grow."*

Yet dealerships remain a critical component of the brand experience for customers and physical interactions are likely to rebound:

- Over seven in ten consumers prefer to visit a dealership to get answers on specific questions before they buy and will continue doing that once it is safe.

Carmakers will need to work with dealers to provide an omnichannel brand experience for customers. Companies are now launching cars virtually, offering live-streamed video consultations with dealers and digital showrooms. This can be further enhanced by using immersive technologies, such as AR/VR, to explore the design, features, and functionality of vehicles. The research shows that 81% of consumers prefer online ordering and home delivery of parts or components and 79% expect the trade-ins of their old cars to be conducted online.

81% OF CONSUMERS PREFER ONLINE ORDERING AND HOME DELIVERY OF PARTS OR COMPONENTS AND 79% EXPECT THE TRADE-INS OF THEIR OLD CARS TO BE CONDUCTED ONLINE.

Actions for organizations for building a better digital experience:

- **Accelerate digitization of the customer journey:**

Automotive organizations will need to explore how to digitalize each step of customer journey. While bricks-and-mortar presence will continue to play an important role in addressing customers' need to experience a car, they will also expect a better omni-channel experience. As automakers establish more direct relationships with customers, elements such as convenience, choice, responsiveness, and flexibility during the purchase journey will become more important.

- Companies are prioritizing the digitalization of customer journeys. BMW has consolidated digital across the company into one central decision-making function, reporting directly to the company's board.³³
- Groupe PSA has rolled out distance selling solutions, including video presentation of vehicles, remote estimation of trade-in value, videoconferencing with sales consultants, and online reservations, online subscription, and home delivery.³⁴
- Mercedes-Benz USA has introduced a "mixed reality" automotive maintenance system, which allows technicians at dealers to share real-time views of the vehicle when talking with Mercedes-Benz technical specialists. It will improve turnaround times for customers' queries.

- **Reallocate marketing and advertising budgets to digital:** In 2019, automotive brands spent around 42% of their budgets on digital channels, compared with 49% on average for all brands.³⁵ Auto brands will need to invest in innovative marketing on digital channels to

engage with consumers. Melissa Grady, CMO of Cadillac, the GM-owned luxury carmaker, has said, *"We changed our advertising about every two weeks going on through the pandemic ... We started looking regionally at certain metrics on where some of the hotspots were at the time (and) where our inventory was. We built a model and based on that we were advertising and leaning really strong into addressable (digital) media."*³⁶

- **Use connected car data to test features to optimize for each market segment:**

Customers attitudes and interactions with cars are changing during the pandemic. Companies need to use telematics and data from customer touchpoints (such as the car brand's mobile app) to understand which features they value and use the most. The insight generated can be used to deliver better customer impact metrics while optimizing cost. For example, when Ford saw that its F-150 customers almost never used remote unlock feature for rear doors, it removed the feature without impacting customers at all.³⁷

- **Develop an engaging in-car experience:** Consumers increasingly demand in-vehicle connectivity and driver assistance features. Companies need to step up investments in proprietary software, in partnership with software vendors, to provide a differentiated, and immersive experience, driven by digital. Capgemini's recent research on connected vehicles shows that OEMs are yet to exploit the full potential of connectivity services, as 44% of customers do not yet have any connected services in their cars. The research also revealed that out of 23 connected services use-case categories, customers who use them value safety and security-related services the most.³⁸

Conclusion

The COVID-19 pandemic has changed the relationship consumers have with their cars and with automotive organizations. They have higher expectations when it comes to health and wellness features and the digitization of sales and aftersales processes. Due to risks from multiple waves of COVID-19 infection and its new strains, they continue to prize individual mobility over public and shared modes of transport. They also demand more connected car features. This offers a significant opportunity for the industry. Automakers can generate revenue from recurring digital subscription services. With growing data from telematics and digital interactions, they can get even closer to their consumers, discovering new needs and expectations and meeting these demands. While the pandemic has affected short-term automotive demand, it has accelerated critical long-term trends: digitization, electrification, and connected cars. Companies that lead in capturing this upside will emerge stronger when the crisis finally recedes.

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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