

AUTOMOTIVE SALES: A BUMPY ROAD TO RECOVERY



CONTENTS

GLOBAL MARKET RESEARCH FINDINGS	3
CHALLENGES AND BEST PRACTICES	8
THE CAPGEMINI INVENT AUTOMOTIVE SALES RECOVERY FRAMEWORK	10
IMPLEMENTATION APPROACH TO RECOVER SALES	12

GLOBAL MARKET RESEARCH FINDINGS

The COVID-19 crisis poses an unprecedented challenge for the automotive industry and the global economy

With sales dropping, production ground to a halt, and stock markets at a six-year low – the COVID-19 crisis has left almost no fragment of the global economy untouched. As a key pillar of the economy, this applies explicitly to the automotive industry, which has been facing challenges on both the supply and demand sides recently. Supply chains – many of which are strongly connected to China, which was hit first by COVID-19 – have been interrupted and delayed, resulting in costly production stops. About 100 automotive production facilities globally were closed as of April 2020¹. But even more dramatic is the plunge in demand: in Europe car sales dropped by over 55% in March 2020 year over year². Due to COVID-19, customers

are rethinking their consumption and investment decisions, as well as their future mobility behavior. According to Capgemini Invent research, 54% are planning to postpone their planned car purchase in 2020. This has placed a heavy financial burden not only on OEMs, but on the entire industry, including dealers, many of whom are struggling for survival due to closed showrooms. Despite help from OEMs and governmental measures, the COVID-19 crisis is causing severe liquidity challenges and leading to the first insolvencies among dealers.

With regards to automotive sales, we have calculated three possible recovery scenarios for the European automotive market based on general economic

projections by the German Council of Economic Experts (see figure 1). Even in the best-case scenario, a strong deviation from pre-crisis forecasts is to be expected for at least a year. However, this would require the quick recovery of global supply chains, good product availability, and fast recovery of vehicle demand. More pessimistic researchers and industry experts predict a much deeper crisis, with a slow three-to-five-year recovery phase. A scenario which frightens automotive managers, employees and shareholders alike. Our research suggests a less dramatic, milder trend case, with a recovery phase until the end of 2021. Several facts and recent developments support this prediction, including the rebound of the Chinese market, the currently well-functioning restart of the industry's supply chain, and purchase incentives planned by European governments, such as bonuses for the purchases of electric vehicles.

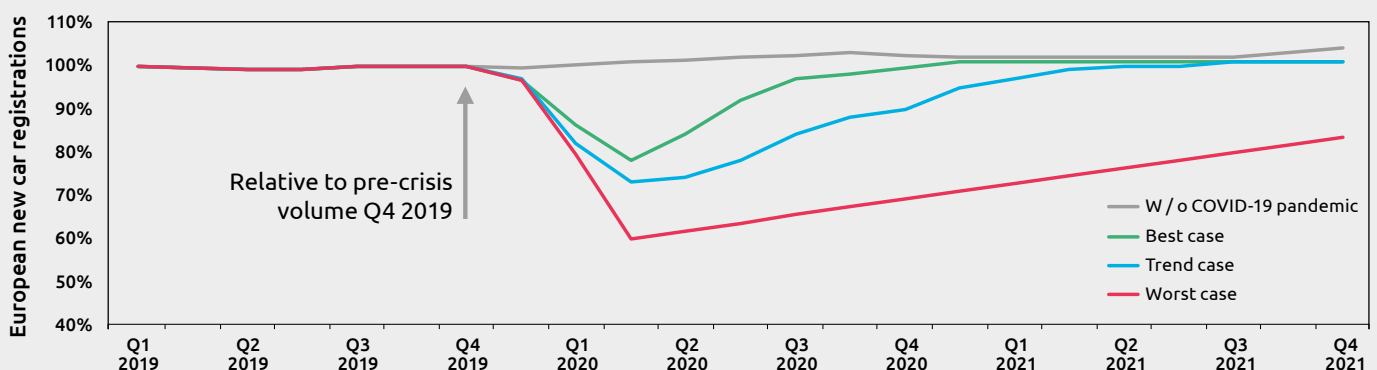


figure 1 | Capgemini Invent scenarios for automotive market recovery in Europe

The scenarios in the graph indicate the recovery for the European automotive market. We expect a similar development for the North American market with a delay of 4-6 weeks. First recovery signals from China indicate an even faster recovery. Not only because

the COVID-19 development in China is about two months ahead of Europe, but also because local demand is picking up faster than expected.

To develop targeted and quickly effective measures to support

automotive sales recovery, we conducted in-depth research covering the customer as well as OEM and dealer perspectives. The results of this research, as well as measures to counter the crisis, will be outlined on the following pages.

¹Springer, 2020

²ACEA, 2020

Customers postpone purchase decisions due to financial uncertainty as well as regulatory hurdles caused by the COVID-19 crisis

Investigating the most effective levers to recover automotive sales, we start at the customers' perspective. We surveyed over 4,000 customers with car purchase intentions in 5 markets; Germany, US, UK, China and India.

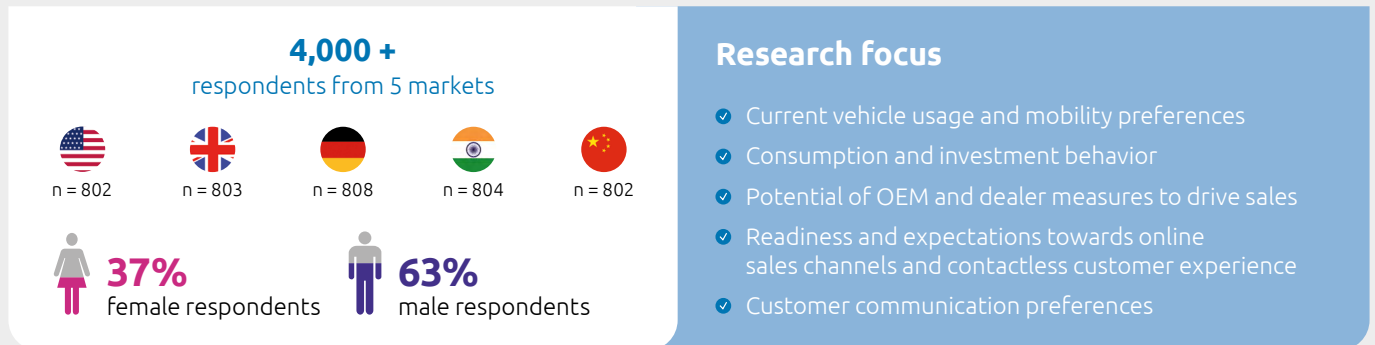


Figure 2 | Capgemini Invent Global Sales Recovery study facts

In our survey we focused on car purchase and mobility behavior, complementing the existing global survey by the Capgemini Research Institute¹ focused on general shifts in mobility behavior as a result of COVID-19.

“54% of consumers are postponing their planned car purchase”

As expected, a majority (54%) of respondents stated that they are currently postponing a planned car purchase due to COVID-19. The most frequent reason given for this, was financial uncertainty. On a more positive note, however, the survey suggests that customers' reluctance can be counteracted with three different measures:

Special offers

Customers are not entirely opposed to making a car purchase. If offered additional incentives, self-expressed willingness to buy a car increases strongly: 62% of customers interviewed could be convinced by an attractive discount, while another 51% would expect additional products and services as an incentive. However, it is not just monetary reasons that are mentioned. 32% of customers in our survey would accelerate their car purchase for a stock model. This certainly is an interesting insight for OEMs and dealers currently sitting on a large stock of vehicles.

Flexible contracts

Given that financial insecurities are currently the most frequent reason for postponing a car purchase, OEMs and dealers can help customers in their purchase decisions by expanding the range of flexible payment and mobility solutions. Besides the willingness to switch to more flexible usage such as subscription or long-term rental, a rising general preference for privately owned vehicles (that are perceived to be more secure and hygienic) seems to be a preliminary result of the COVID-19 crisis. According to the Capgemini

Research Institute study, which had a strong focus on mobility behavior, this is especially true for customers below the age of 35 who were previously very fond of shared mobility solutions. 42% of those customers interested in owning a car could be convinced to make a purchase if they were offered more flexible payment options, potentially easing their financial insecurities.

Digital sales

Finally, the distribution network in the automotive industry is currently disrupted, for instance by the closure of showrooms. This can lend new emphasis to existing initiatives regarding digital sales. From a customer perspective, this would certainly be desirable: 56% of the participants consider a contactless experience to be very important. Accordingly, 78% of the respondents claim to be more likely to purchase cars online than before the COVID-19 crisis.

¹ Capgemini Research Institute



Figure 3 | Capgemini Invent Global Sales Recovery Study research findings

These survey results are generally supported by sentiments on social media globally. In our social listening analysis, we found lively discussions around whether to use public or private transport in times of COVID-19. Mentions of using cabs or services like Uber have notably decreased since the start of the global pandemic.

Conversely, discussions around the possibilities to buy cars online spiked after global lockdowns were implemented (see figure 4). Especially in the US, many customers share their end-to-end online sales experiences with companies such as Carvana or Tesla.

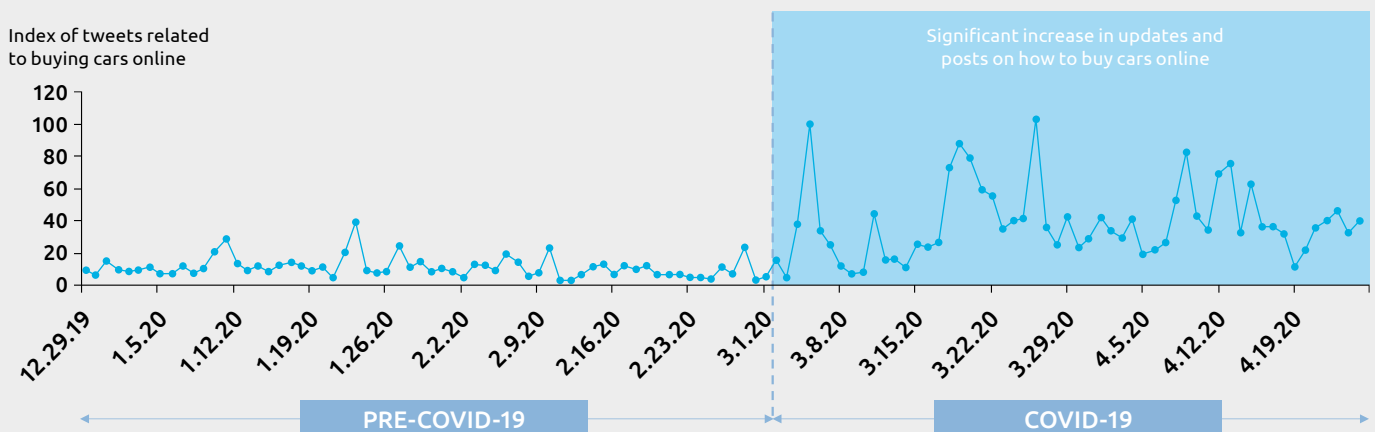


Figure 4 | Social media activity on online car purchases¹

¹ Capgemini Automotive Research Institute social listening analysis

Market specifics

Even though these three trends hold true for each of the surveyed markets and can be interpreted as globally relevant, it is important to also highlight market specific results in order to tailor initiatives and recommendations to the respective country for a maximized impact.

Answers from **German** respondents indicate an urgent demand for a new car as a secure personal means of transportation: Even though Germany is traditionally a strong build-to-order market, 43% of customers intending to buy a car in the near future would currently also accept a stock vehicle. However, customers that were initially deterred from their planned car purchases by the COVID-19 crisis, are very likely to come back later. Almost 75% of our respondents claimed to be willing to buy a car in the next 6 months, if incentivized in the right way.

In the **US** market, the protective nature of a private car is very much appreciated as well. 95% of US respondents now want to own or exclusively use a private car as a result of COVID-19. This will be bad news for car sharing providers: 36% of customers want to reduce their usage of shared mobility. When purchasing a car, 46% prefer specific activities (e.g. signing of contract) to still be made offline, while 42% of our respondents currently prefer an all-online sales process.

The elimination of additional physical touchpoints during the sales process is also valued by **British** customers. The essential step in the process is the vehicle delivery for a test drive, which is an important part of a contactless sales process for 56% of the respondents. In a similar vein, we can expect to see a strong substitution in means of transport in the UK after the crisis. 38% of our respondents claim to be willing to use their own car more than before and almost 50% will decrease their use of public transport.

Because of their strong digital mindset, **Chinese** customers have been very open to using online channels during the COVID-19 pandemic. Almost 50% would currently and soon prefer to buy a car via the digital channels of the dealer or the OEM. Concerns on health and safety even go one step further: 7% of customers who previously had no purchase intention whatsoever, are now willing to buy a car to protect themselves from a COVID-19 infection.

Moving on to **India**, we see a similar picture. As a result of COVID-19, 73% of our Indian respondents want to reduce their use of public transport. The obvious alternative for many customers is owning a private car. 99% of respondents stated an openness towards being convinced into making a purchase by measures and incentives. Hard numbers apart, Indian customers are also generally happy to stay in touch. Social Media is very popular with our respondents for receiving updates on COVID-19 (29%) as well as marketing campaigns (27%).

Our survey has shown a likely decline of car sharing and public transport and an increase in the demand for personal mobility, especially in China and India. Even though car ownership is on the rise again due to health and safety reasons, vehicle purchases are more likely to be deferred for the next 3-12 months. By launching targeted measures, OEMs could convince most hesitating customers in the short and medium term to purchase a car. But the expectations are high. Hesitating and new customers are expecting OEMs and dealers to provide them with new offers. These offers should include flexible contracts and usage models as well as an extended scope of additional products & services. Regarding the customers' financial concerns, attractive discounts and state purchase incentives can be of great help. Contactless sales will play a major role in the future. The "new normal" buying behavior is digital, where e-commerce, contactless test drives, vehicle delivery and services are favored by customers. Moreover, the changing mobility behavior offers the OEMs and Captives an opportunity to reach a new target group. There is a considerable amount of people purely using public transportation and sharing services that now consider purchasing a car, but in a different ownership model than the traditional one.

Special offers



By launching **targeted measures** now, OEMs are able to **convince hesitating** but also **new customer groups**.

Flexible Contracts



OEMs now have the chance to convert customers through the **flexibility of their product portfolio**.

Digital Sales



Online sales are a key enabler to reopen sales channels and convert customers.

Germany

59%	of hesitating customers claim that an attractive discount could persuade them to buy	40%	state they want to postpone their purchase due to financial uncertainty	51%	consider a contactless vehicle delivery for a test drive to be important
43%	would accelerate their buying decision for a quickly-available car	56%	prefer a car with more flexible payment options	60%	say that they are now more likely to buy cars online than before the pandemic
49%	expect an extended scope of additional products & services	22%*	want to use vehicles flexibly instead of owning them after the pandemic	25%	demand that an online sales process needs to be end-to-end

US

69%	of hesitating customers claim that an attractive discount could persuade them to buy	38%	state they want to postpone their purchase due to financial uncertainty	75%	consider a contactless vehicle delivery for a test drive to be important
73%	would accelerate their buying decision for a quickly-available car	40%	prefer a car with more flexible payment options	68%	say that they are now more likely to buy cars online than before the pandemic
47%	claim they would accelerate their purchase decision if additional products and services were offered			42%	want an all-online sales process

UK

70%	of hesitating customers claim that an attractive discount could persuade them to buy	34%	state they want to postpone their purchase due to financial uncertainty	44%	consider a contactless vehicle delivery for a test drive to be important
35%	would accelerate their buying decision for a quickly-available car	41%	prefer a car with more flexible payment options	62%	say that they are now more likely to buy cars online than before the pandemic
43%	expect an extended scope of additional products & services			32%	would buy their future car online from the OEM or dealership

China

61%	of hesitating customers claim that an attractive discount could persuade them to buy	39%	state they want to postpone their purchase due to financial uncertainty	62%	would accelerate their purchase decision , if there were contactless vehicle purchase options
47%	would accelerate their buying decision for a quickly-available car	62%	accelerate their purchase decision when offered more flexible payment options	79%	say that they are now more likely to buy cars online than before the pandemic
41%	expect an extended scope of additional products & services	39%	can be generally convinced to buy a car with more flexible payment and usage options	49%	would buy their future car online from the OEM or dealership

India

99%	of hesitating customers accelerate their purchase if provided with attractive sales incentives	39%	state they want to postpone their purchase due to financial uncertainty	50%	consider a contactless sales process to be very important
60%	would accelerate their buying decision for a quickly-available car	41%	prefer a car with more flexible payment options	73%	say that they are now more likely to buy cars online than before the pandemic
69%	claim that an extended scope of additional products & services might convince them to buy			44%	would buy their future car online from the OEM or dealership

Figure 5 | Capgemini Invent Global Sales Recovery market-specific research insights

*Single-choice question, primarily focused on time after COVID-19. General willingness for subscription use much higher, see [Capgemini Invent Subscription Blog](#)

CHALLENGES AND BEST PRACTICES

The decline in car sales is especially threatening to automotive dealerships

Dealers are directly affected by the customer behavior outlined above. With customers unwilling to visit them for a conversation or test drive, or their showrooms being closed altogether due to health and safety regulations, their traditional business has been completely disrupted by COVID-19. To get a clearer picture of the current situation and the most urgent pain points at automotive dealerships, we conducted over 30 focus interviews with dealers throughout Europe. The results all relate to the following four main steps on the way to long-term recovery from the crisis.

COVID-19 impact on business

The impact of COVID-19 has been massive for dealers. In line with the customer insights above, new car sales have dropped to almost zero during the last weeks, resulting in a 25% drop of passenger car registrations for the first quarter of 2020, and a dramatic decrease of over 55% for the month of March in the EU¹. The average shutdown duration of 26 working days for production sites in the EU accounts for a production loss of over two million motor vehicles up to April 20². Additionally, the aftersales service business has lost a larger percentage of its revenues. Overall, this means that dealer revenues have significantly decreased overnight, while costs have largely remained the same. For dealerships with an already low level of financial stability before the crisis, this now means significant liquidity challenges. As one of the dealers interviewed put it: "This will be the survival of the fittest." This struggle might be eased by government aid in some countries. However, such aid may come too late for some dealers and might not be enough in the long term for others. Looking forward, dealers face great uncertainty regarding future development of the markets.

Current support of OEMs

A large proportion of dealers lacks support from OEMs. While there has been strong communication with a few dealers regarding measures to be taken, most dealers are dissatisfied with the timing and extent of proposed measures. Regarding the communication of future scenarios, dealers expect more information about mid-term and long-term plans and developments. If support initiatives do exist, they primarily focus on financial support, leading to the perception of a non-comprehensive and slow sales recovery support.

Dealer recovery initiatives

Dealers have already taken measures to boost sales. The focus is on improving digital sales channels as the importance of the set up and expansion for the customer was quickly recognized: "A push in digital is the only way out" was one of the first things one dealer told us in interviews.

¹ ACEA, 2020

² ACEA, 2020

“A push in digital is the only way out.”

Dealer interview

Besides sales continuation via telephone and Skype, dealers are also making greater use of previously underexploited communication channels such as social media (especially Facebook and Instagram). Thus, they use a variety of channels to inform their customers, among others, about availability, offers (e.g. wheel replacement), and supply shortages. The increased use of third-party platforms serves as another crucial sales channel for reducing car stock. Currently, many dealers face the challenge of an unequal knowledge of digital tools among their employees. While developing digital sales channels and tools to increase profitability, dealers must take steps to train sales staff in digitalization.

Long-term perspective

The future of dealers can be seen in the adage “We need to rethink our old beliefs.” To survive, they must rapidly accelerate the digitalization of the entire sales process. It will be essential for them to be more open to direct / agency sales with fair margin models. Finally, they must approach new business models (e.g. mobility, subscription) without prejudice rather than simply ignore them.

Best practices from China

A wide range of measures has already been identified in the Chinese market to recover sales and stimulate vehicle demand. It's not just the OEMs and dealers who are responding to COVID-19 with innovative ideas and digital solutions – third parties and platform providers are also reacting quickly to the crisis and helping to overcome the above-mentioned challenges. In particular, the creation of virtual offers, the enablement of a contactless customer experience, and new types of lead management can be observed (see figure 6).

Online Experience



GEELY AUTO

- ✔ Provision of fully contactless solution on online basis
- ✔ Cars delivered disinfected and fully fueled for test driving including pick-up service from home for free
- ✔ Car service pickups also included

Contactless Sales



TESLA

- ✔ Zero contact test drive and vehicle home delivery
- ✔ Appointment creation online (Weibo) or via phone
- ✔ In-car video instructions during test drive

Online Experience



MERCEDES-BENZ

- ✔ Enhancing online presence with live-shows from selected dealerships and 360° vehicle views
- ✔ Collaboration with dealers to build virtual reality showroom

Dealer Enablement



VW (FAW)

- ✔ 3-day webinar for 50,000 salespeople from dealerships in China by partnering with Taobao University
- ✔ Trained on digital tools & contactless customer experience

figure 6 | Exemplary sales recovery initiatives in China

THE CAPGEMINI INVENT AUTOMOTIVE SALES RECOVERY FRAMEWORK

Taking the right steps towards recovery

Based on our extensive analysis of the current situation of OEMs, dealers and customers, we have developed the Capgemini Invent Automotive Sales Recovery Framework (see figure 7). With this, we are addressing key challenges for OEMs and dealers to help our clients revive their sales performance. Our framework has a clear focus on top-line growth to recover sales volume and gain market share. Using the framework, we can easily derive initiatives for customer-oriented sales and marketing organizations of OEMs (Captives included), National Sales Companies (NSCs), and dealers. These initiatives can be successfully implemented in the short to medium term. In line with the framework, we developed an Automotive Sales Recovery Toolbox that provides a variety of actionable initiatives along the structure.

The framework provides an internal focus and a customer focus. The internal focus includes initiatives concerning completely internal processes and organization topics of the OEM and its dealer network. The customer focus relates to initiatives / actions of the OEM and dealer that have a direct customer impact, such as the integration of online and offline channels or the portfolio expansion with new offers (e.g. car subscription models). Based on the research, we identified eight dimensions divided into the above-mentioned focuses. These dimensions represent areas that must be addressed in order to recover sales. Each one includes several recommended actions. In order to address diverse development stages of the crisis, the initiatives account for different time horizons and goals. Our initiatives are covered in the Capgemini Automotive Sales Recovery Toolbox. The framework as well as Toolbox are targeted to the distribution levels of OEMs, markets represented by NSCs, and dealers.



The eight dimensions of sales recovery

We have identified the following eight dimensions as being critical for the protection and recovery of automotive sales during the COVID-19 crisis:

Comeback organization deals with the (temporary) adaption of the internal organization to ensure focused crisis management. Best practice sharing of markets and / or dealers, a central support unit for NSCs and dealers (including shared services) or, alternatively, dedicated sales and marketing taskforces are helpful and efficient methods to establish a successful comeback organization.

Recovery analytics are essential to enable funnel transparency and to effectively steer the sales funnel with data analytics and KPI dashboards. In times of uncertainty, control and transparency are needed to manage the situation in a way that is as focused as possible. A crisis control tower or a sales recovery dashboard with real-time data are examples of supportive tools.

Dealer network stabilization is clearly needed to support dealerships on their path back to a sustainable, healthy business. To reach this goal, dealers can be consulted and qualified for specific measures, such as a financial support program or the consolidated management of specific dealer groups.

Targeted offers should be considered a major instrument to attract and convince customers. This includes special and temporary purchase incentives, such as package bundles and temporary discounts and bonuses (on cars and aftersales). Captive players can also have a big impact on this dimension, with temporary financing or leasing promotions or special conditions.

Flexible mobility enablement means pushing flexible contracts and financial products to lower high customer uncertainty. Potential initiatives include creating new, more flexible leasing / financing contracts or car subscription models that are tailored to (new) customer mobility needs.

Sales funnel reactivation includes the adjustment of the OEMs' and Captives' communication strategy. It mainly focuses on the (re-)activation of customers and leads. Potential initiatives are live-streaming events and video messages as well as adapting the marketing mix and media spending to communicate with the customers in the best possible way.

Contactless customer experience represents the accelerated extension of digital sales and virtual customer care. Considering the customer's possible security concerns, OEMs, Captives and dealers can interact with them in a contactless way via third-party platforms and provide sales consultation via augmented reality goggles (e.g. Vypii, a real-time video consulting tool).

Sales process adaptation covers the creation of new solutions and workarounds for a hassle-free sales process. Contactless vehicle handover for sales and aftersales as well as digital payment and signature processes enable customers to complete a car purchase without having to meet the dealer face to face.

IMPLEMENTATION APPROACH TO RECOVER SALES

Even in times of crisis a structured approach is key to a successful recovery

So, how can the measures from the Automotive Sales Recovery Framework be implemented in the most efficient and sustainable way to cope with the current crisis? A structured transformation approach supports the framework implementation. When planning the implementation, we recommend three-steps that focus on governance, adaptations, and scalability (see figure 8).

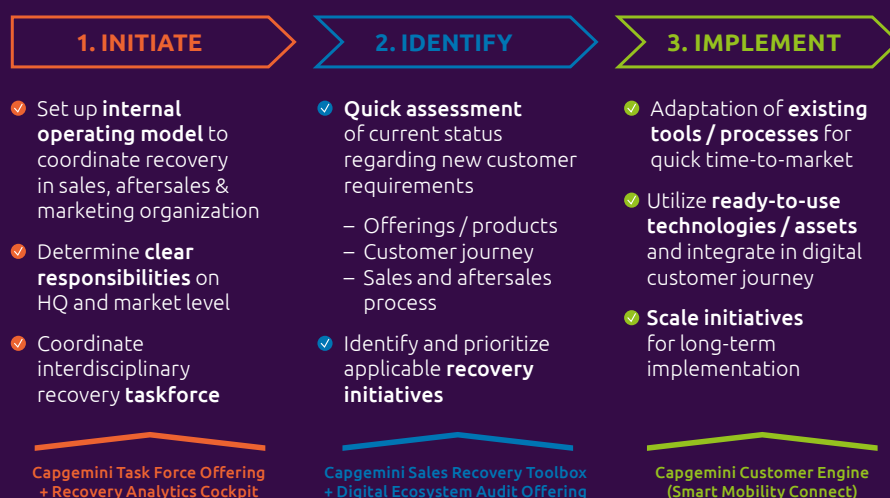


figure 8 | Capgemini Sales Recovery transformation approach

The three-step implementation approach ensures a comprehensive transformation

Initiate

Comprehensive and efficient planning should constitute the first step. We recommend setting up and coordinating an interdisciplinary recovery taskforce to steer and manage a clear recovery plan for the sales, marketing and aftersales organization. The creation of an internal operating model to manage recovery and define clear responsibilities at corporate and market level are part of the recovery plan and should be focused on during this stage.

Identify

After establishing an interdisciplinary recovery taskforce, an assessment of the status quo and the most pressing challenges and possible solutions is needed to prioritize recovery initiatives. The objective for all initiatives must be to protect current sales levels and avoid further damage with quick and decisive action. There should be a special focus on the analysis of the current portfolio, the customer journey, and the sales / aftersales process. The above-mentioned toolbox and framework can be used as a guide for this stage.

Implement

Once the situation has been clearly assessed and recovery initiatives identified and prioritized, it is time to successfully implement them. During this phase, it is key to address post-crisis customer requirements that will represent the “new normal” and the expected standard. In order to reach this goal, existing tools and processes will have to be adapted. Moreover, ready-to-use-assets and technologies will need to be utilized, and new processes, systems, and products / services developed and introduced to the market. A fast time to market is one success factor to concentrate on during this phase. Due to the high degree of digitization along the customer journey, we recommend an emphasis on digital offers and initiatives. All in all, it will be key to scale the initiatives for a long-term implementation and to secure a competitive position.

Checklist for OEMs: what to do now?

Having discussed the three-step implementation approach for crisis recovery, it is now time for action. Below, you will find a checklist with the most urgent measures to address. We strongly encourage you to start working on these topics for your company by planning out their implementation and setting up taskforces to work on these measures.



Targeted offers

- ✔ Provide targeted offers for sales and aftersales services now – especially for customers who still need to use a car during the crisis
- ✔ Offer more flexible and customer-friendly financing options during the crisis – no down payment, low interest rates

Flexible mobility enablement

- ✔ Extend short- and mid-term rental business via dealers and Captives – flexible mobility options are needed during the crisis
- ✔ Offer more flexible leasing contracts in terms of duration and payment conditions – the right offers can win customers even in difficult times

Sales funnel reactivation

- ✔ Set up an end-to-end digital sales process – for now and for the future
- ✔ Keep in touch with your customers, and be as personal as possible – digital touchpoints do not replace a personal connection

Contactless customer experience

- ✔ Set up a convincing e-commerce solution that can capture all necessary steps normally conducted in the showroom – from inspiration to consultation and test drive appointments
- ✔ Build up a presence on existing third-party online sales platforms – use well-established sales channels for short-term impact

Sales process adaptation

- ✔ Provide solution approaches for a contactless execution of each step in the sales process to dealers – from test drive to contract signature and payment
- ✔ Ensure that (new) car registration is possible in cooperation with local authorities – possibly via a more digital process

Dealer network stabilization

- ✔ Quickly develop (online) training and coaching programs for dealers regarding all current challenges – from safeguarding liquidity to using digital tools
- ✔ Develop an approach to provide financial rescue packages for troubled dealers if necessary – often in collaboration with local governments

Recovery analytics

- ✔ Set up a crisis control tower to consolidate all relevant information and updates – information and quick reaction are key in times of crisis
- ✔ Develop or improve a comprehensive sales funnel steering and monitoring – closely monitor crisis impact and recovery

Comeback organization

- ✔ Enable dealers and markets to share best practices – set up a digital collaboration platform
- ✔ Set up a dedicated sales recovery taskforce to plan and guide the path to recovery – successful recovery requires guidance

Getting ready for recovery

Sales growing strongly, production running on full capacity, and stock markets on a clear upwards trend – nobody can be sure when this bumpy road will end and if the vision state will become reality once again. One thing is certain though: no action is not an option. Decisive and fast moves will ensure the healthy survival of automotive companies and lay the foundation for an impressive path to the “new normal”. The “new normal” will certainly be characterized by an increase in online sales leading to a seamless omnichannel experience. Moreover, the demand for individual mobility will make vehicle ownership more attractive on the one hand, and, on the other, put car sharing and public transport under severe pressure. Hygiene and health will become one strong motivator to buy and will have to be assimilated by the automotive industry and beyond.

Players within the automotive industry must find a healthy balance between protecting current sales in the short term, and adjusting their offers and ways of working to the “new normal” for a long-term competitive market position:

1. Recover and re-establish the core business of operative sales to drive profitability and to secure distribution assets in the short term.
2. Implement new measures and optimize the portfolio to satisfy post-crisis customer demands (e.g. social distancing commerce) to shape the automotive industry’s “new normal” in the medium term.
3. Integrate new business and operating models and change long overdue structures to excel in the “new normal” standards in the long term.

The measures outlined in our study are designed to help you achieve these goals. We are more than happy to discuss our insights and recommended actions with you in more detail. Feel free to reach out to us anytime.

CONTACTS

Thank you

Please contact us for more information.



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Automotive Sales – a bumpy road to recovery is part of Capgemini's Smart Mobility Connect offering. It empowers OEMs to create the mobility ecosystem of the future designed with people at heart. We bring the mobility ecosystem of the future to life through a host of products and services within three core pillars: Connected Customer, Connected Services and Products as well as Connected Ecosystem.

The technological framework that helps us deliver on our approach, the Customer Engine, connects these pillars and integrates intelligence into different stages of the journey.

Find out more: www.capgemini.com/invent/smart-mobility-connect



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