

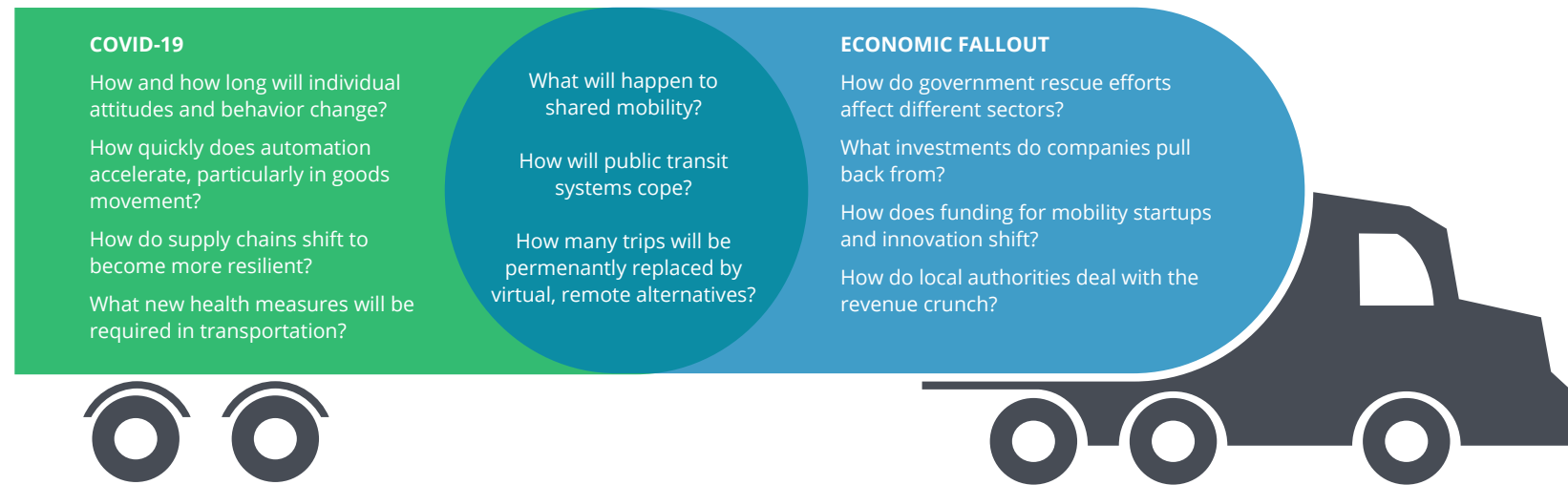
## Scenarios for transportation in a postcoronavirus world

For almost a decade, progress has been made toward a new model for moving people and goods. Powered by quickly evolving technologies, new business models, and shifting societal expectations, a future of mobility that is more sustainable, equitable, efficient, and convenient than today seemed inevitable, even if the precise timing and nature of that transformation was uncertain.

Enter COVID-19. The pandemic has shut millions of people in their homes and disrupted every part of the transportation domain, but leaders can't simply wait to see how tomorrow's reshaped mobility ecosystem turns out. We offer four possible scenarios to consider for the future of mobility.

In the wake of the COVID-19 pandemic, Deloitte and Salesforce hosted a dialogue among renowned scenario thinkers to consider the potential societal and business impacts. The results of this collaboration can be found in *The world remade by COVID-19: Planning scenarios for resilient leaders*.

### COVID-19 AND ITS ECONOMIC FALLOUT POSE FUNDAMENTALS QUESTIONS ACROSS THE MOBILITY SPECTRUM



### POSSIBLE FOUR SCENARIOS FOR THE FUTURE OF MOBILITY

#### SCENARIO 1: THE PASSING STORM

The pandemic is contained effectively by governments, but is not without lasting, and uneven, economic repercussions.

- Enduring shifts in some mobility trends
- Most providers and governments return to status quo roles
- "Typical" business cycle downturn dynamics play out, with consolidation across the board



#### SCENARIO 2: GOOD COMPANY

Governments around the world struggle to handle the crisis alone, with large companies stepping up as a key part of the solution.

- Public goods (including transit) are increasingly provisioned by the private sector
- Individuals are open to sharing mobility data with private sector
- Mobility technology advances quickly



#### SCENARIO 3: SUNRISE IN THE EAST

China and other East Asian nations are more effective in managing the virus and take the reins as primary global powers.

- Mobility innovation, R&D and value chains consolidate in the East, to the detriment of businesses in the West
- Robust government data collection becomes the norm to actively manage and address system-wide challenges



#### SCENARIO 4: LONE WOLVES

A prolonged pandemic spurs governments to adopt isolationist policies, shorten supply chains, and increase surveillance.

- Governments accrue greater authority in combatting COVID-19
- Cities force data sharing and actively regulate mobility via top-down monitoring to meet systemwide goals
- Data privacy, cybersecurity give way to increased government oversight



Source: "The futures of mobility after COVID-19," Page 6

### Moving forward, what should your organization be thinking about, and how are you preparing to respond?

- Which of your previous expectations need to be rethought?
- What might customers value in these different worlds: cost, convenience, speed, safety, privacy?
- What are the biggest threats to your current business?
- How do the different roles of government influence your strategy and freedom to operate?
- What new providers, companies, business models, and ecosystems might emerge?
- What capabilities, relationships, and assets are important in these worlds?

### Download the full report

[The futures of mobility after COVID-19](#)

There will be many questions to answer and paths to navigate in today's mobility journey. We're here to help. [Drop us a note](#) or visit the [Future of Mobility](#) at Deloitte.

### Future of Mobility

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