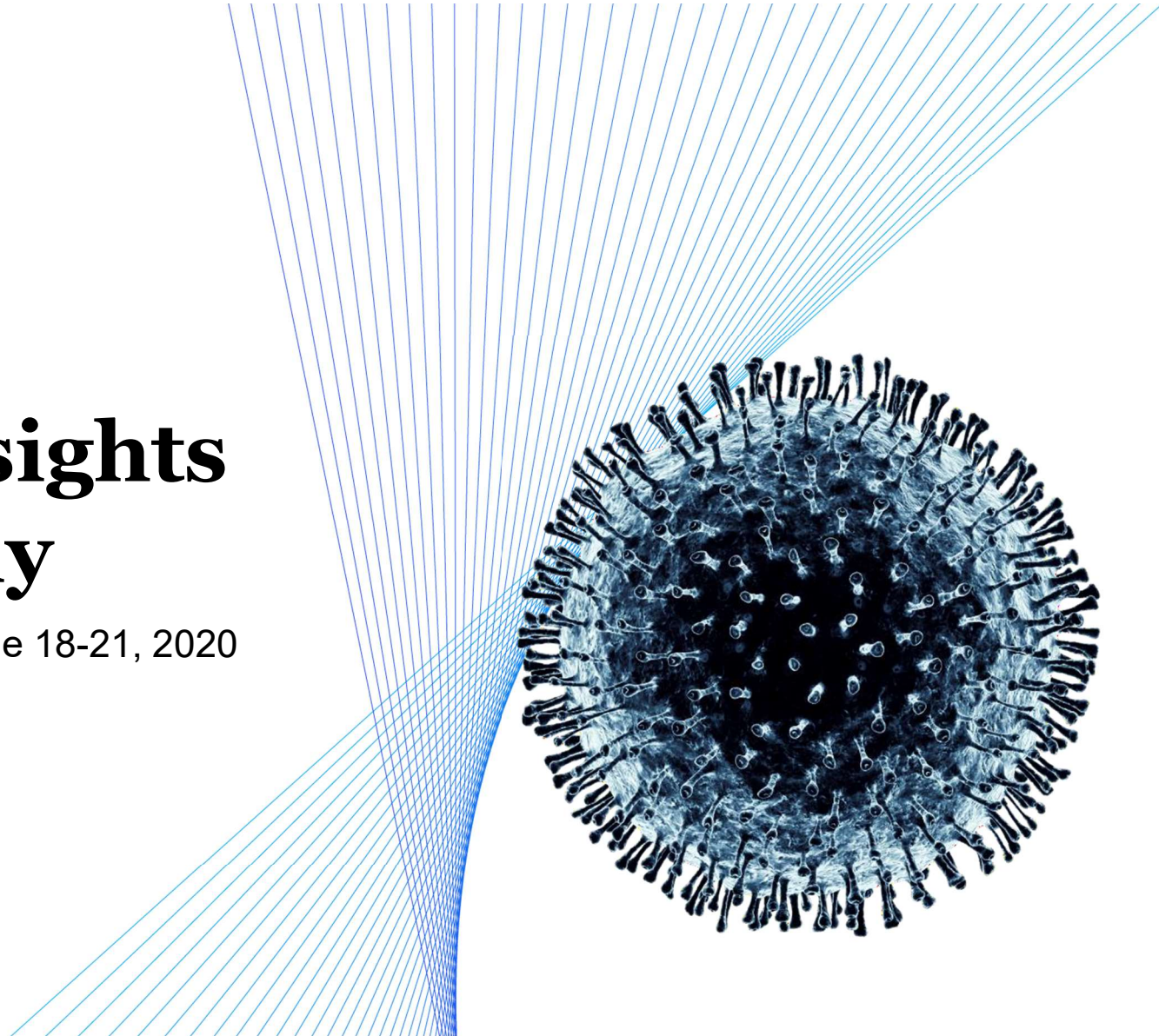


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Coronavirus COVID-19 **Consumer insights from Germany**

Results from consumer survey June 18-21, 2020

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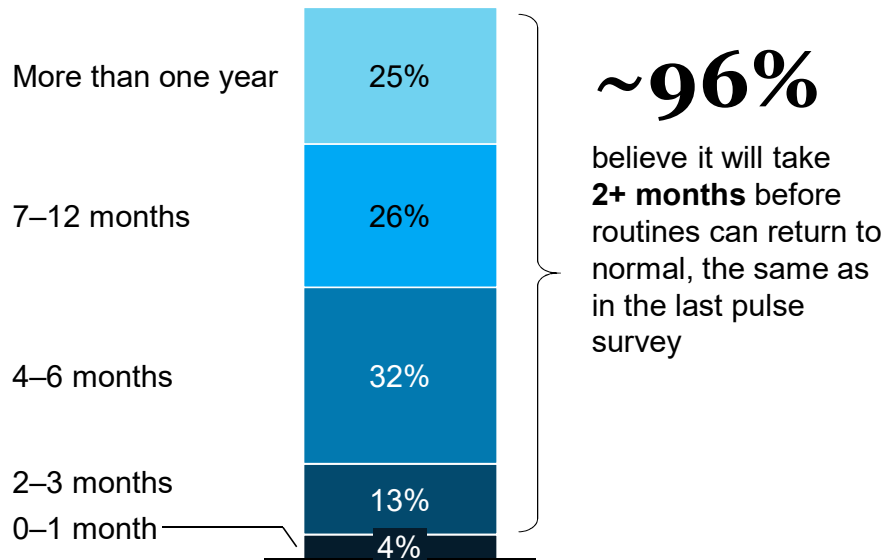




Most Germans expect routines to be impacted for over 2 month, with just over half expecting a similar timescale for financial impact

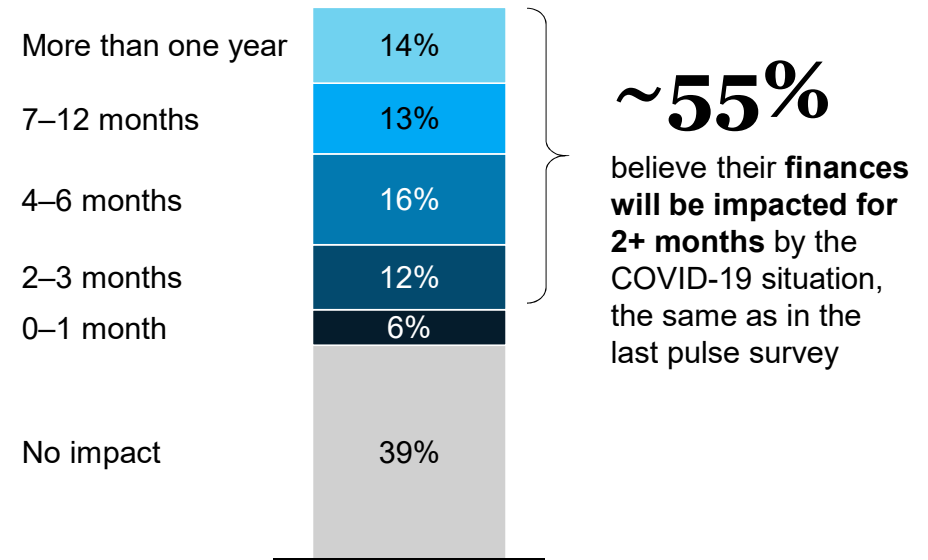
Adjustments to routines¹

% of respondents



Impact on personal/household finances²

% of respondents



¹ Q: How long do you believe you need to adjust your routines, given the current COVID-19 situation, before things return back to normal in Germany (e.g., government lifts restrictions on events/travel)? Figures may not sum to 100% because of rounding.

² Q: How long do you believe your personal/household finances will be impacted by the COVID-19 situation? Figures may not sum to 100% because of rounding.



Germans are becoming more mindful of how they spend their money and adopting habits like making lists and researching

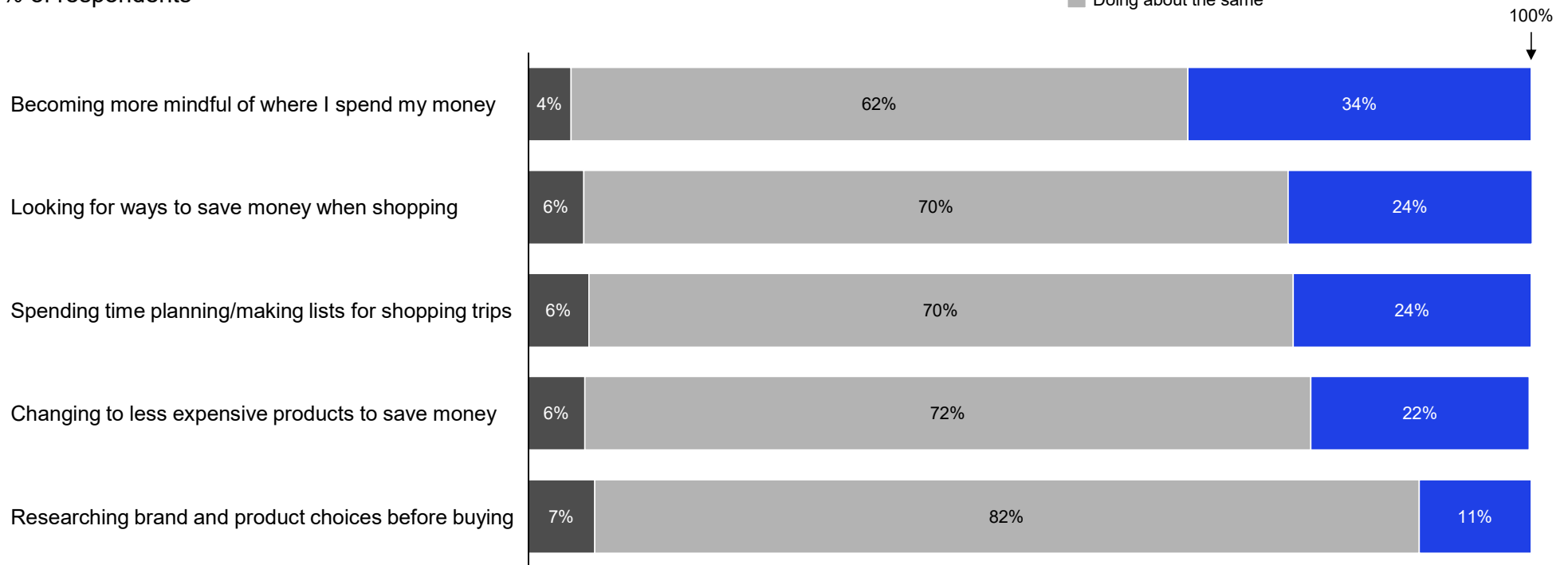
Which best describes how often you are doing each of the following items¹

% of respondents

Doing less

Doing about the same

Doing more



¹ Q: Which best describes how often you are doing each of the following items? Possible answers: "Doing less since coronavirus started"; "Doing about the same since coronavirus started"; "Doing more since coronavirus started."

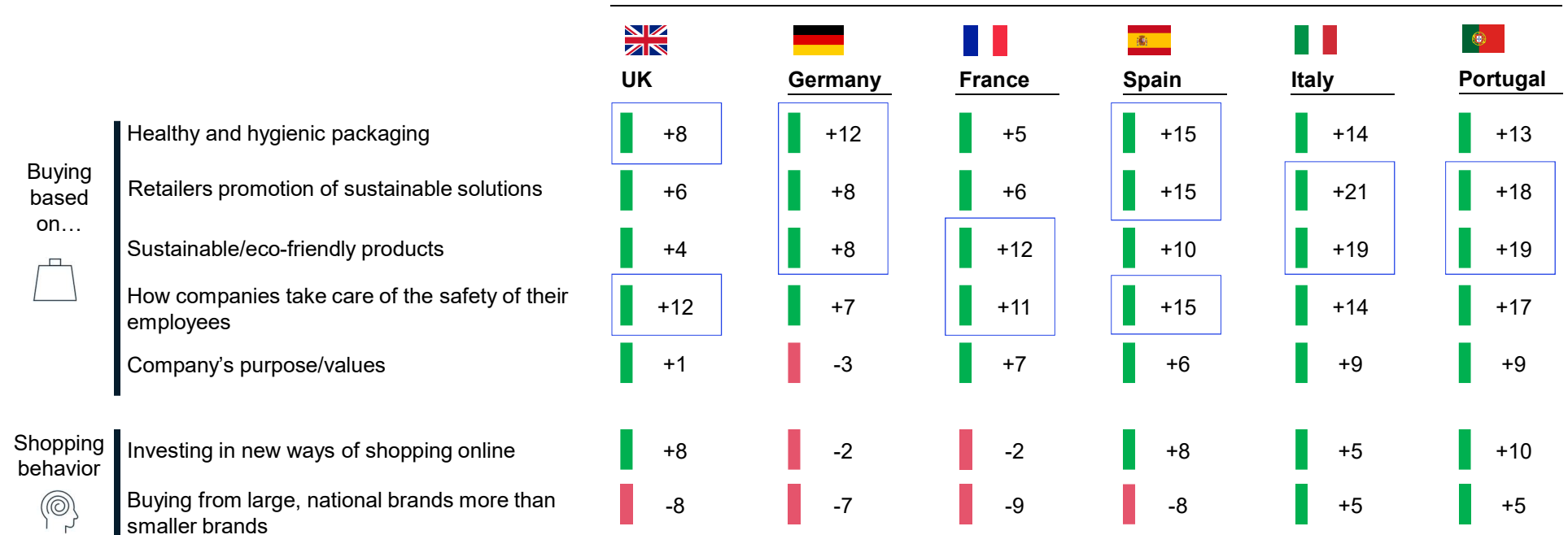


Consumers in Southern Europe (Italy, Spain, Portugal) are doing more buying based on sustainability, purpose and values

Which best describes how often you are doing each of the following items¹

% of respondents

Net intent²



¹ Q: Which best describes how often you are doing each of the following items? Possible answers: "Doing less since coronavirus started"; "Doing about the same since coronavirus started"; "Doing more since coronavirus started."

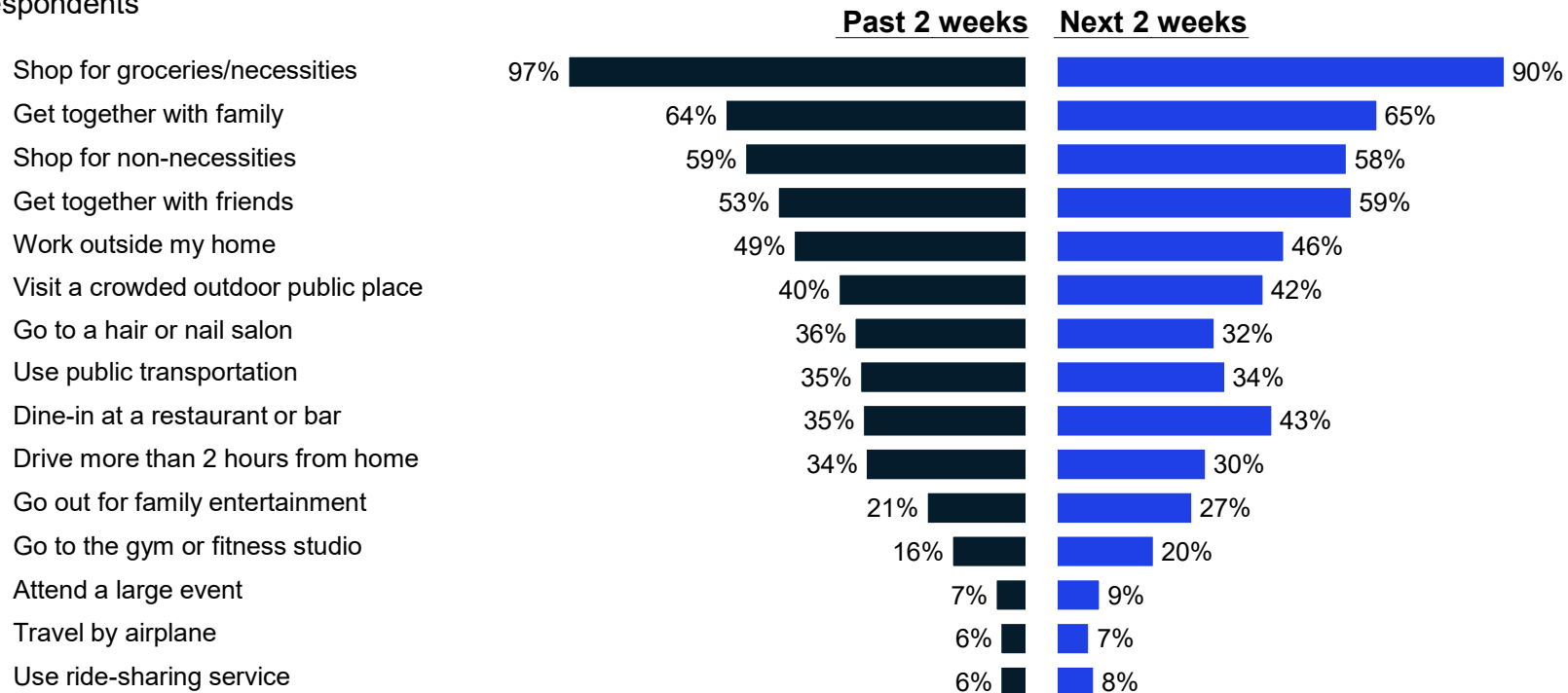
² Net intent is calculated by subtracting the % of respondents stating they expect to decrease time spent from the % of respondents stating they expect to increase time spent.



Germans are planning small increases in social activities such as dining in and going out for family entertainment

Consumers' engagement with activities outside home¹

% of respondents



¹ Q: Did you leave your house for the following activities over the past two weeks? Chart represents the percentage of respondents who indicated that they left home at least once during the past week to do this activity.

Q: For which of the following activities do you intend to leave your home to do in the next two weeks? Chart represents % of respondents who intend to leave their home to do this activity during the next two weeks.

² Q: How worried would you be if you were to do the following activities in the next two weeks? Possible answers: "not worried at all"; "not very worried"; "somewhat worried"; "very worried"; "extremely worried."

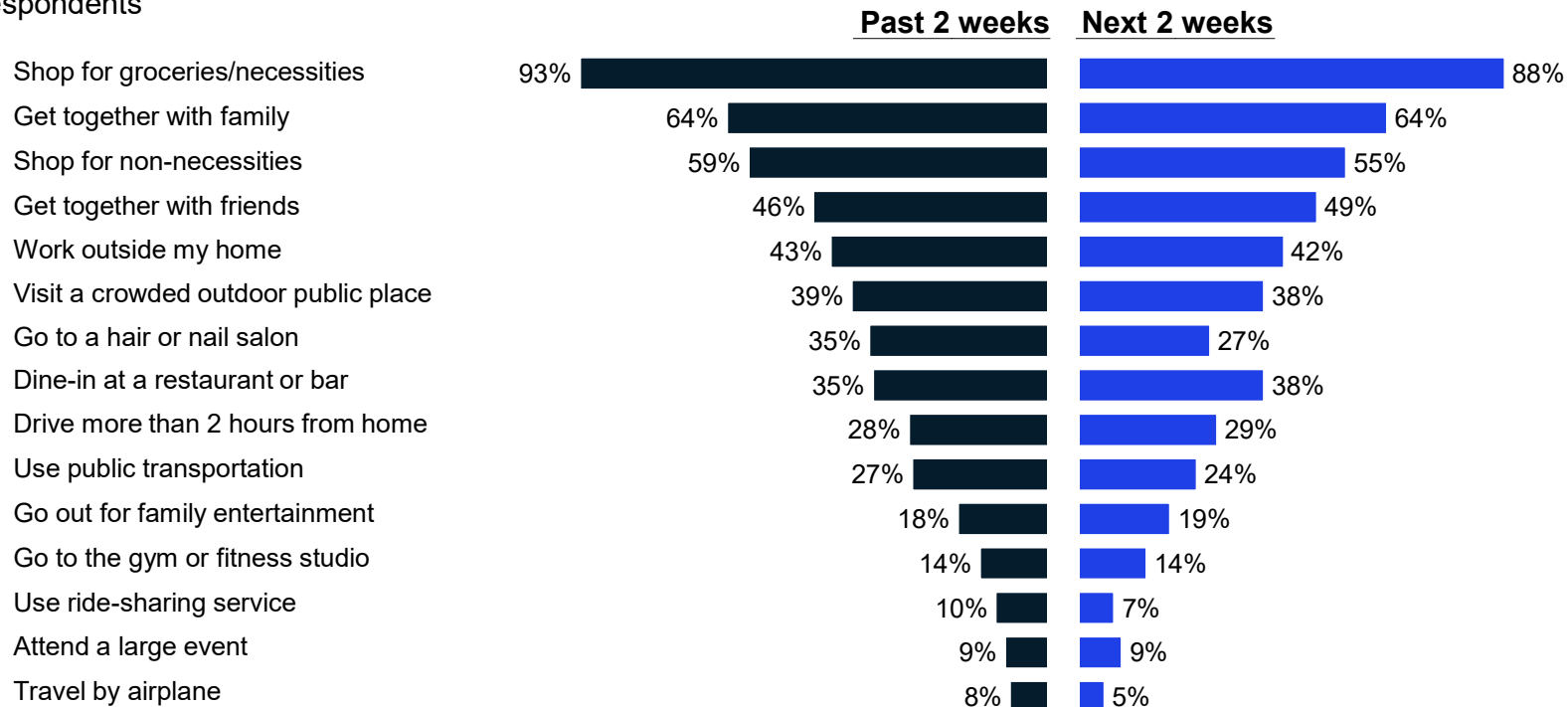
³ Net worry is calculated by subtracting the % of respondents stating they "not worried at all" and "somewhat worried" from "very worried" and "extremely worried."



Despite continued uncertainty and caution, Europeans have started to engage in activities outside, e.g., meeting family and friends

Consumers' engagement with activities outside home¹

% of respondents



¹ Q: Did you leave your house for the following activities over the past two weeks? Chart represents the percentage of respondents who indicated that they left home at least once during the past week to do this activity.

Q: For which of the following activities do you intend to leave your home to do in the next two weeks? Chart represents % of respondents who intend to leave their home to do this activity during the next two weeks.



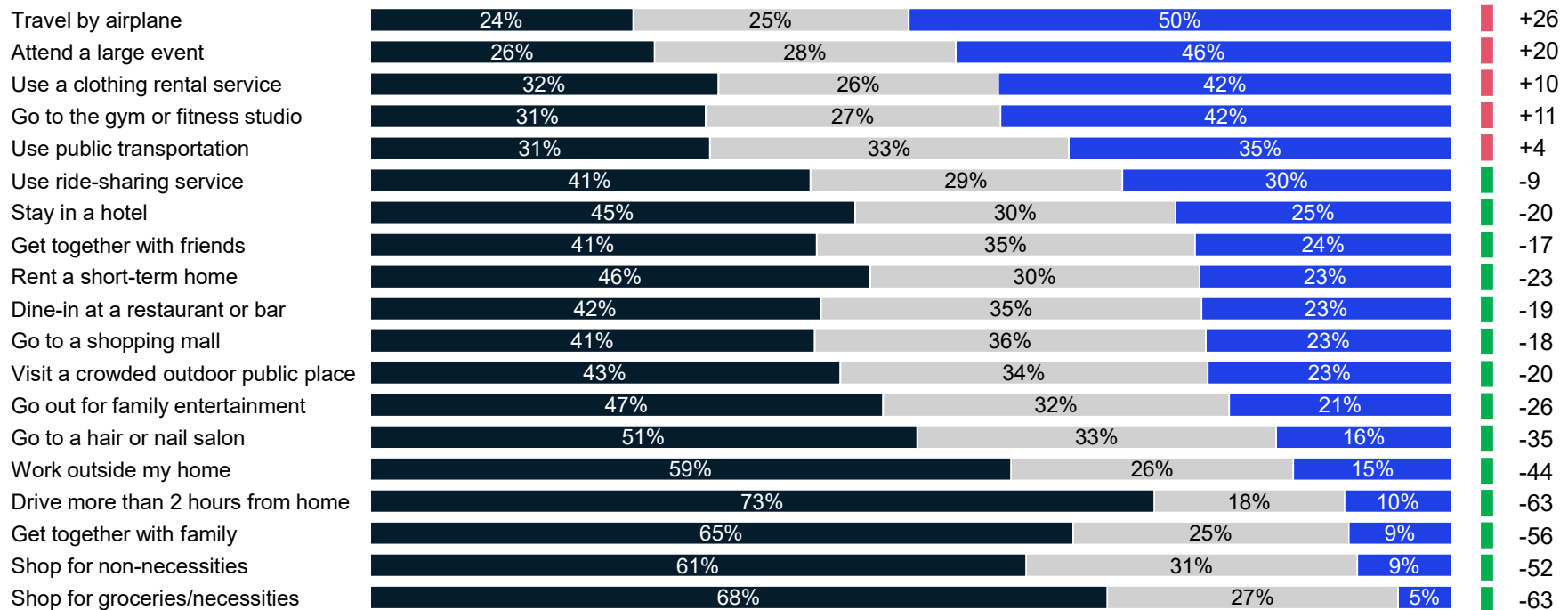
Germans have the highest level of concern in using travel and attending large events

Consumers' worried about out-of-home activities in the next two weeks¹

% of respondents

■ Not worried ■ Somewhat worried ■ Worried

Level of concern²



¹ Q: How worried would you be if you were to do the following activities in the next two weeks? Possible answers: "not worried at all"; "not very worried"; "somewhat worried"; "very worried"; "extremely worried."

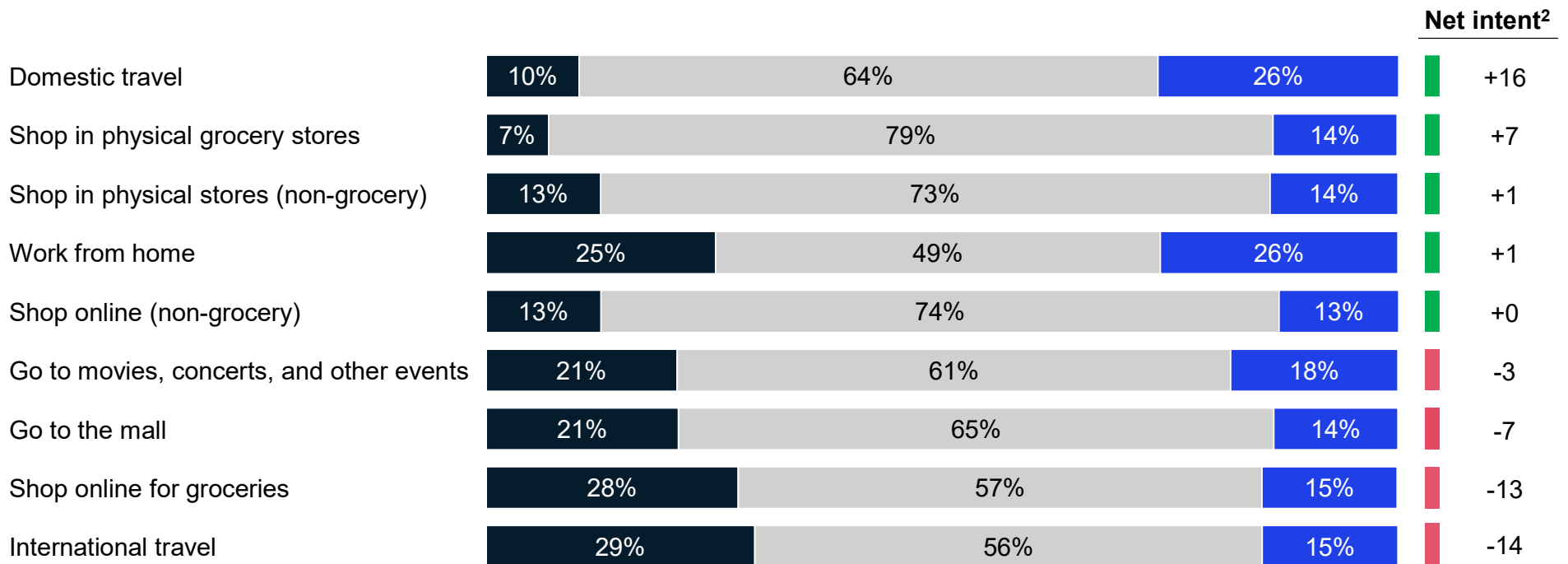
² Level of concern is calculated by subtracting the % of respondents stating they "not worried at all" and "not very worried" from "very worried" and "extremely worried."



Looking beyond COVID-19, consumers expect to replace some international travel with domestic travel

Expectations for consumer behavior after COVID-19, relative to pre-crisis¹
% of respondents

■ Decrease ■ Stay the same ■ Increase



¹ Q: Once the coronavirus (COVID-19) situation has subsided, which of the following do you think you will do more or less compared to before the coronavirus (COVID-19) situation started? Possible answers: "will reduce this"; "will do the same as before coronavirus"; "will increase this."

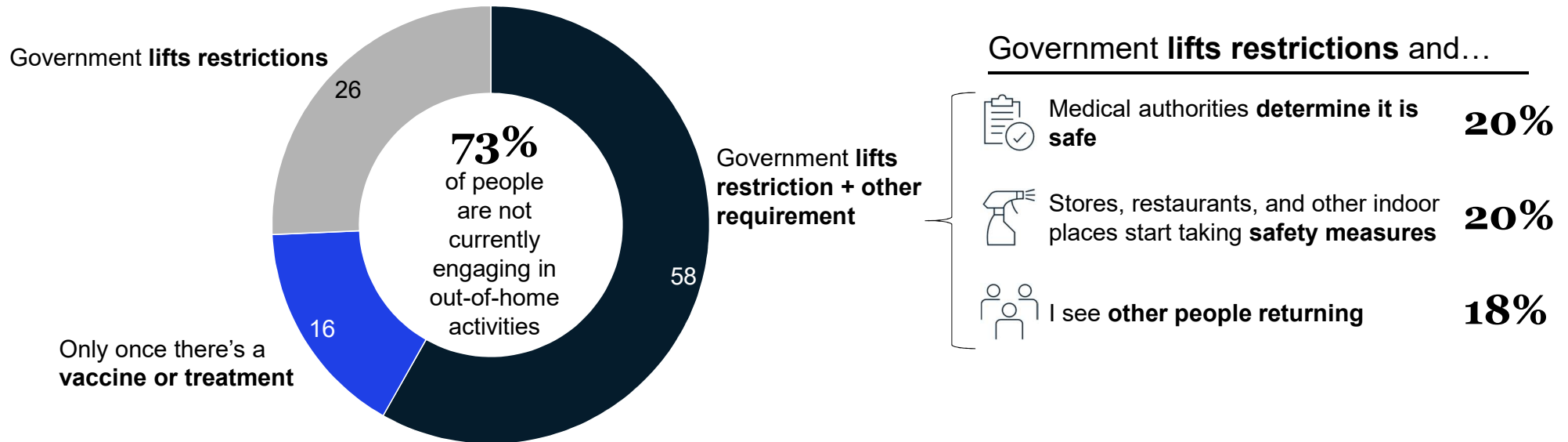
² Net intent is calculated by subtracting the % of respondents stating they expect to decrease time spent from the % of respondents stating they expect to increase time spent.



Of consumers who have not yet engaged with out-of-home activities 74% are waiting for milestones beyond the lifting of restrictions

Milestones for the German population not yet engaging with out-of-home activities¹

% of respondents awaiting each milestone before engaging



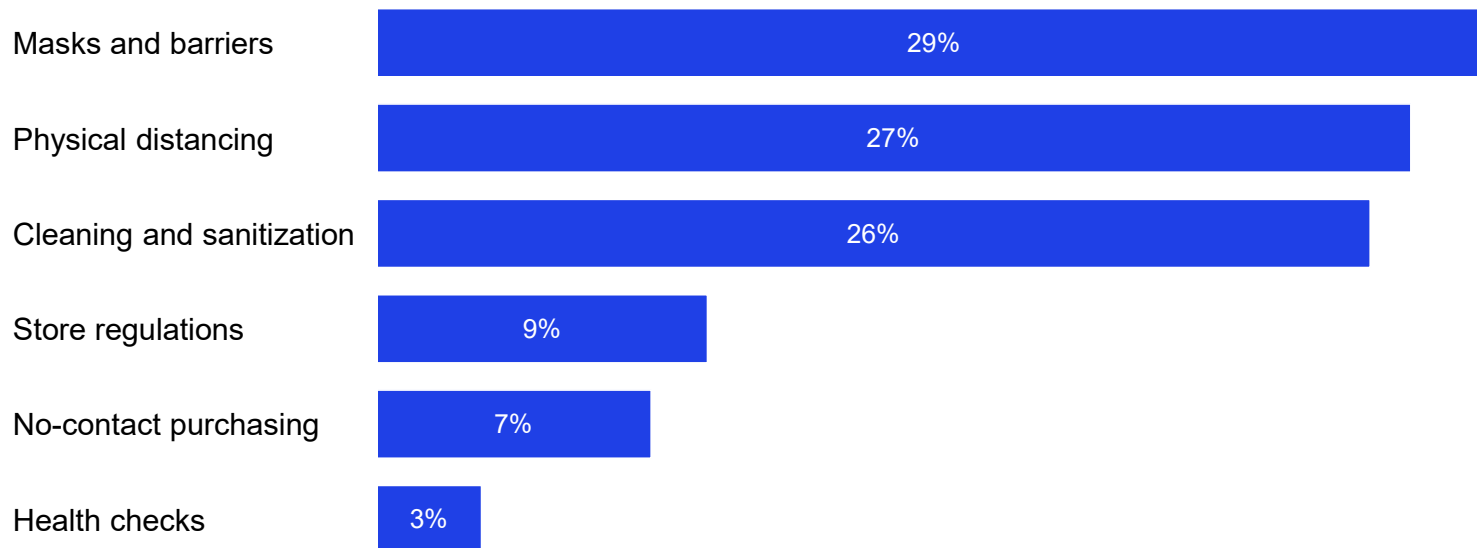
¹ Q: Which best describes when you will regularly return to stores, restaurants, and other out-of-home activities? Chart rebased to exclude those already participating in these activities and those who do not deem any of these items important.



Masks or barriers are most important to consumers as they decide where to shop in-store

Top priorities when deciding where to shop in-store¹

% of respondents for whom this criterion is the most important²



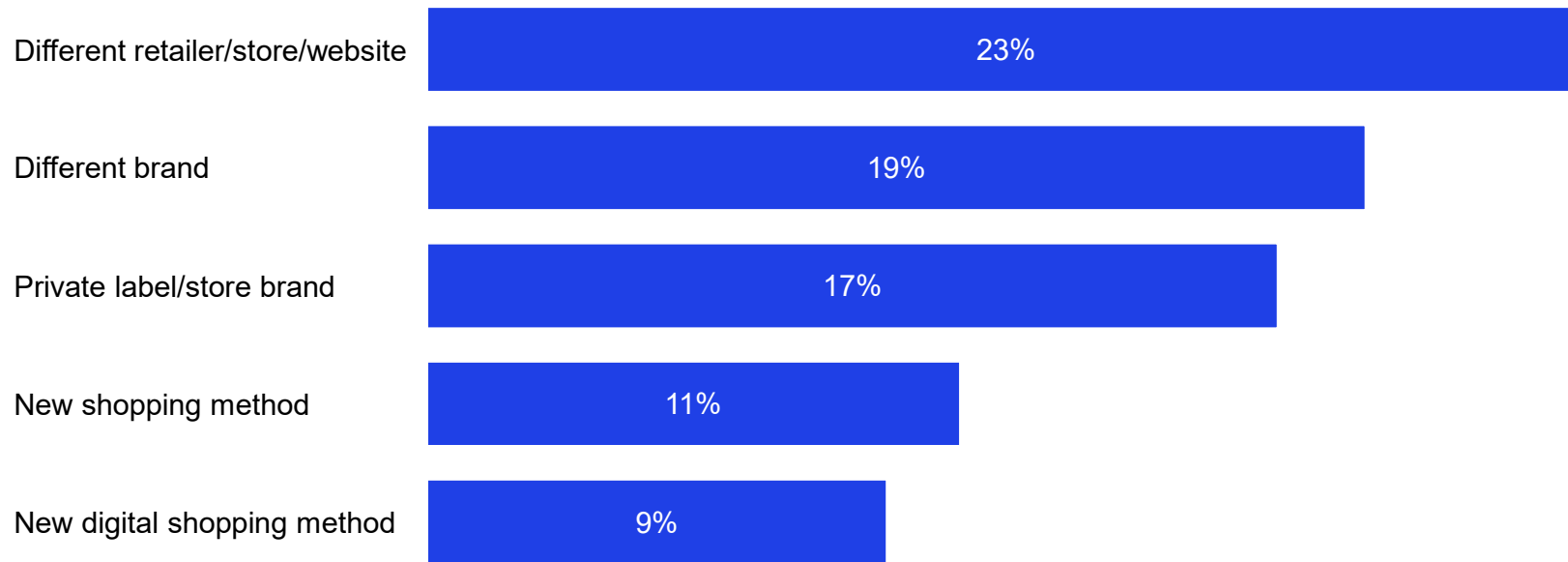
¹ Q: *Once restrictions lift, which of the following factors will be most important to you as you decide which of these places to visit in person?* Respondents were asked to select the most important.

² The following categories are included in each bucket: Cleaning and sanitization—increased cleaning, improved air filtration, availability of sanitizing supplies throughout the store; Health checks—customer wellness check (e.g., temperature) on entry, employees' wellness check (e.g., temperature) on entry; Masks and barriers—customers and employees wear masks, customers and employees provided masks and gloves, plastic barrier with cashier; No-contact purchasing—curbside pick-up, cashier-less checkout, no contact delivery, buy online for pickup in store; Physical distancing—customer number limit, distancing in customer line, reduced employee activity during shopping hours; Store regulations—no customer product testing, one-way store aisles, special hours for high-risk shoppers.



Many consumers have discovered new shopping behaviors, including new stores and brands

Have you used any of the following since COVID-19 started¹
% of respondents



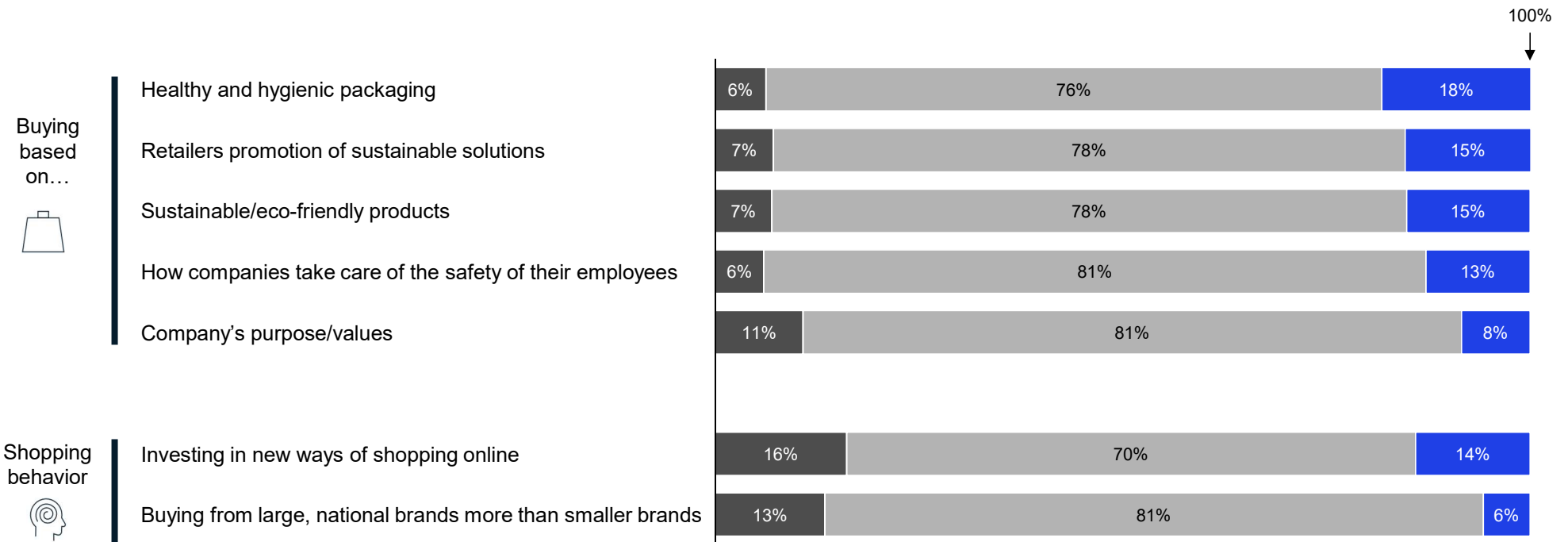
¹ Q: Since the coronavirus (COVID-19) situation started (i.e., in the past ~3 months), which of the following have you done?



Germans have started focusing more on healthy and hygienic packaging and sustainable solutions and products

Which best describes how often you are doing each of the following items¹
% of respondents

■ Doing less ■ Doing about the same ■ Doing more



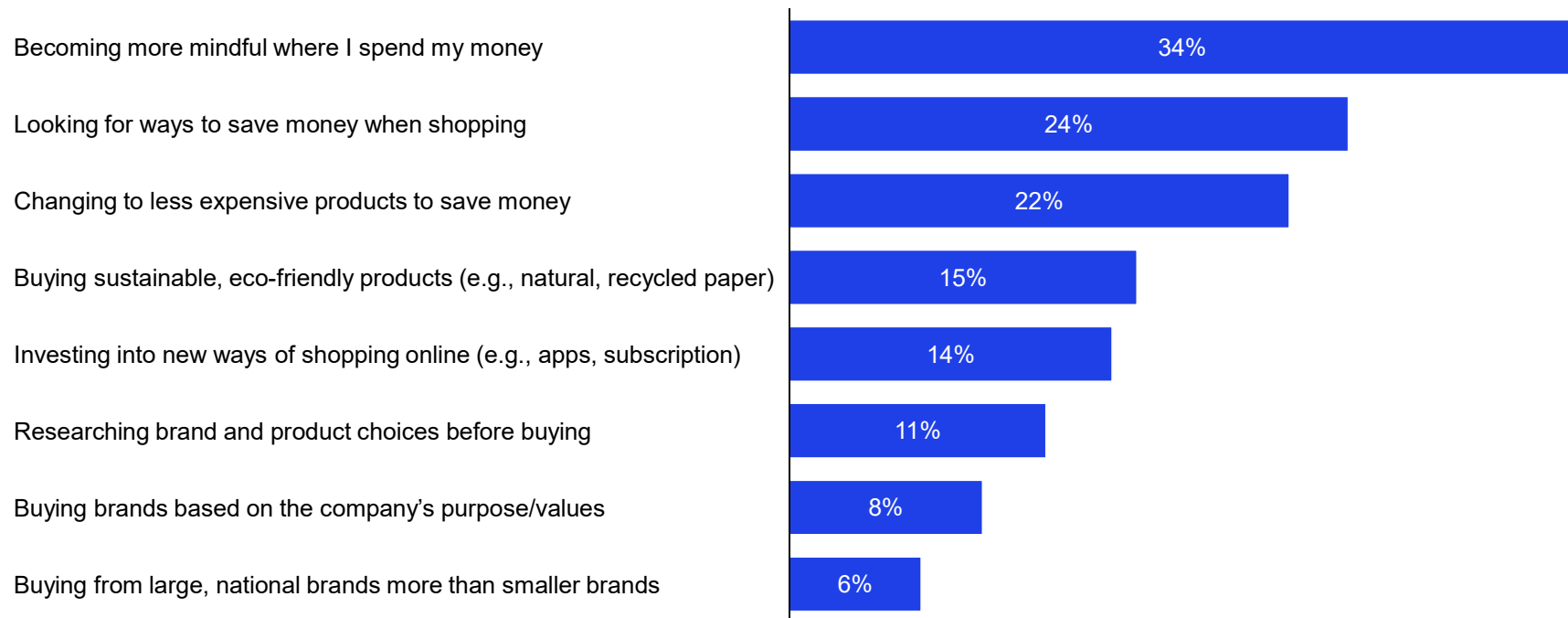
¹ Q: Which best describes how often you are doing each of the following items? Possible answers: "Doing less since coronavirus started"; "Doing about the same since coronavirus started"; "Doing more since coronavirus started."

German consumers are getting more price-sensitive as the effects of COVID-19 progress



Which best describes how often Germany's consumers do each of the following?¹
% of respondents

■ Doing more since the coronavirus started



¹ Q: Which best describes how often you do each of the following items? Please select from 3 answers: 1) Doing less since the coronavirus started, 2) Doing about the same since coronavirus started, 3) Doing more since the coronavirus started.

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