

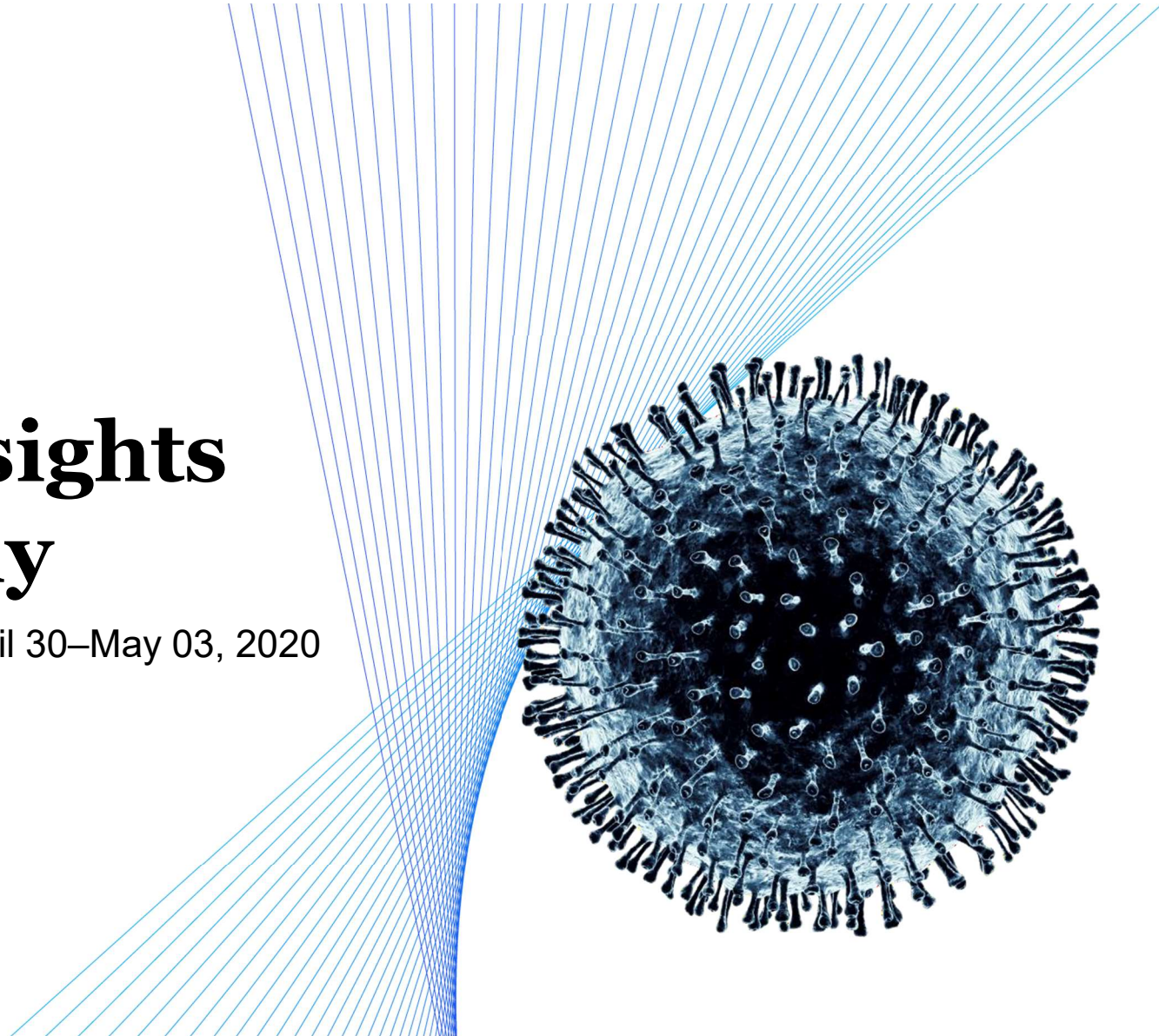
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# Coronavirus COVID-19 Consumer insights from Germany

Results from consumer survey April 30–May 03, 2020

Updated: May 05, 2020

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- **COVID-19 is first and foremost a major humanitarian challenge.** Thousands of health professionals are battling the virus, putting their own lives at risk. Overstretched health systems will need time and help to return to a semblance of normalcy.
  - **Solving the humanitarian challenge is, of course, priority #1.** Much remains to be done globally to respond and recover, from counting the humanitarian costs of the virus, to supporting the victims and families, to finding a vaccine.
  - **This document is meant to help with a narrower goal: provide consumer insights during the current COVID-19 situation.** In addition to the humanitarian challenge, there are implications for the wider economy, businesses, and employment. This document includes consumer insights from a survey conducted between April 30 and Mai 03 in Germany.



# As restrictions in Germany are lifted very cautiously consumers get increasingly pessimistic about the economic impact

## Confidence in own country's economic recovery after COVID-19<sup>1</sup> % of respondents

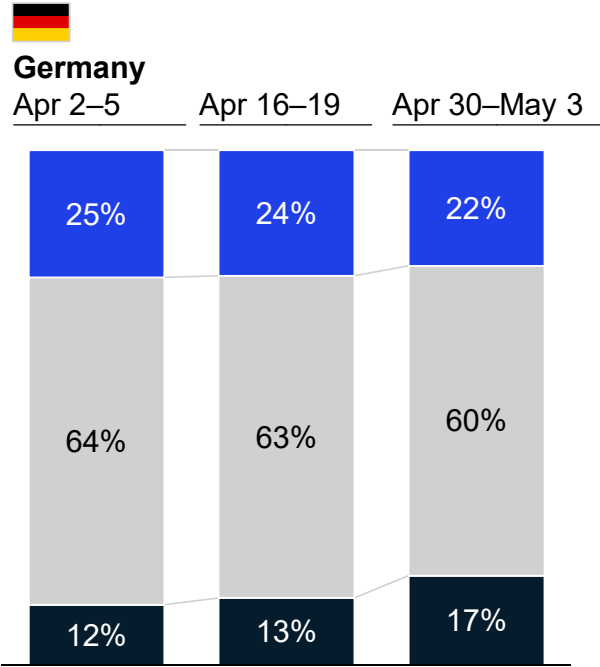
- Optimistic:** The economy will rebound within 2–3 months and grow just as strong as or stronger than before COVID-19

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- Unsure:** The economy will be impacted for 6–12 months or longer and will stagnate or show slow growth thereafter

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- Pessimistic:** COVID-19 will have lasting impact on the economy and show regression/fall into lengthy recession



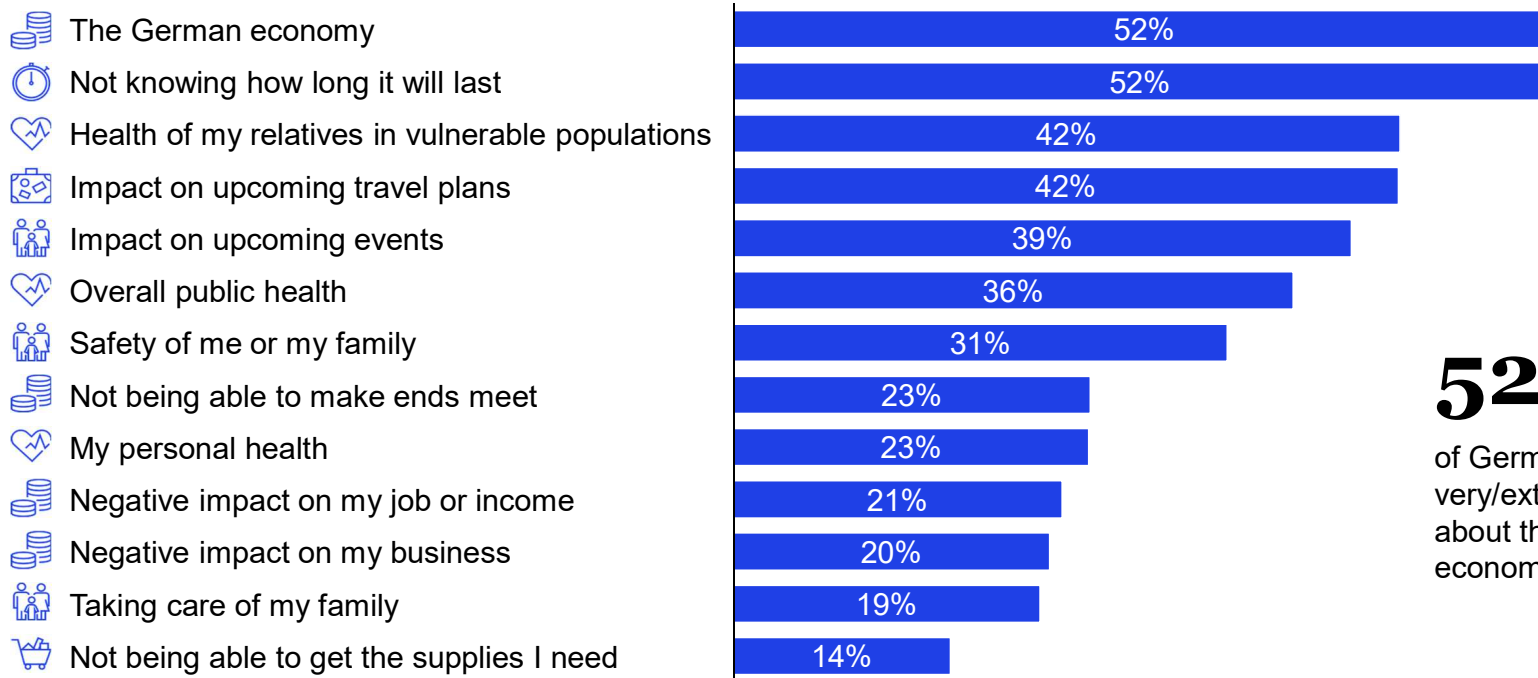
<sup>1</sup> Q: How is your overall confidence level on economic conditions after the COVID-19 situation? Rated from 1 "very optimistic" to 6 "very pessimistic"; figures may not sum to 100% because of rounding.



# Uncertainty about the duration of the situation and the state of the German economy are top concerns for German consumers

**Largest concerns of the German population related to COVID-19<sup>1</sup>**  
% of respondents who are very concerned or extremely concerned

■ Very concerned / extremely concerned



**52%**  
of Germans are very/extremely concerned about the German economy

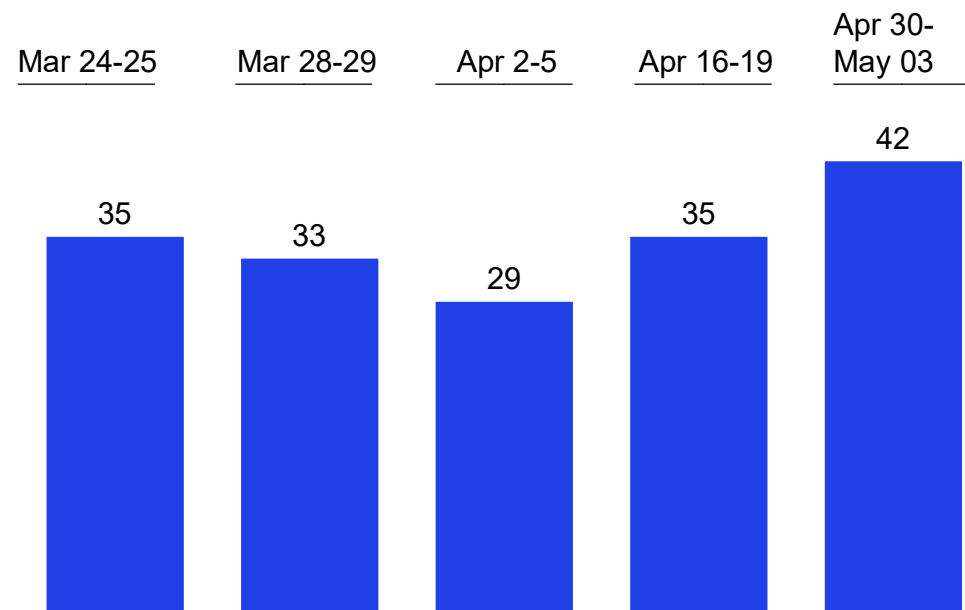
<sup>1</sup> Q: *What concerns you most about the COVID-19 situation?* Possible answers: "not a concern"; "minimally concerned"; "somewhat concerned"; "very concerned"; "extremely concerned."



# As Germany has extended travel warning concerns about upcoming travel plans has increased to more than 40% in the recent survey

## Largest concerns of the German population related to COVID-19<sup>1</sup>

% of respondents who are very concerned or extremely concerned about impact on upcoming travel plans



<sup>1</sup> Q: *What concerns you most about the COVID-19 situation?* Possible answers: "not a concern"; "minimally concerned"; "somewhat concerned"; "very concerned"; "extremely concerned."



# More than half of consumers did not go out for non-food shopping during the last 2 weeks

## Going out for activities during the last 2 weeks<sup>1</sup>

% of respondents

■ Did not go out ■ 1 day ■ 2-3 days ■ 4-6 days ■ 7-9 days ■ 10 days or more

Other (non-food) shopping such as apparel, skin care, consumer electronics



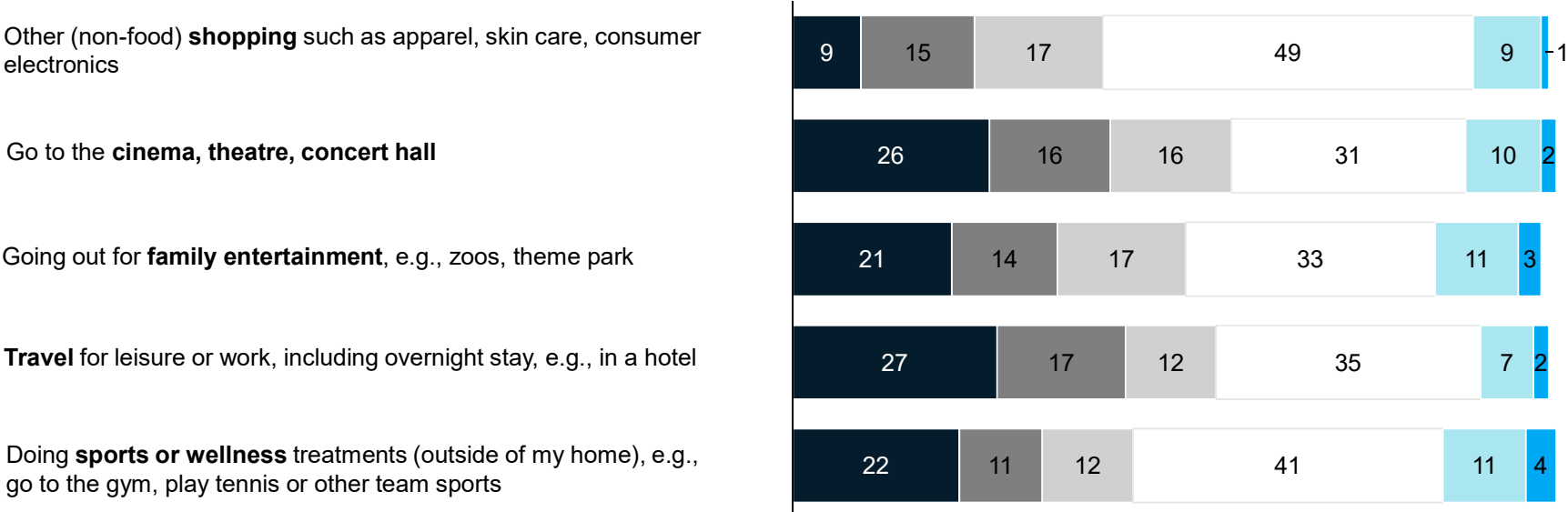
<sup>1</sup> Q: In the last 2 weeks, did you go out for the following activities? If so, how many days | Other (non-food) shopping such as apparel, skin care, consumer electronics



# Looking beyond COVID-19 consumers intent to decrease travel and out-of-home entertainment like cinema the most

**Intent to continue activities once the COVID-19 situation has subsided<sup>1</sup>**  
 % of respondents

■ I will not do this (anymore) ■ Much less frequently ■ Somewhat less ■ About the same as before ■ Somewhat more ■ Much more frequently



<sup>1</sup> Q: Compared to now, will you do or use the following more, less or not at all, once the coronavirus (COVID-19) situation has subsided? (will stop this, will reduce this, will keep doing what I am doing now, will increase this)



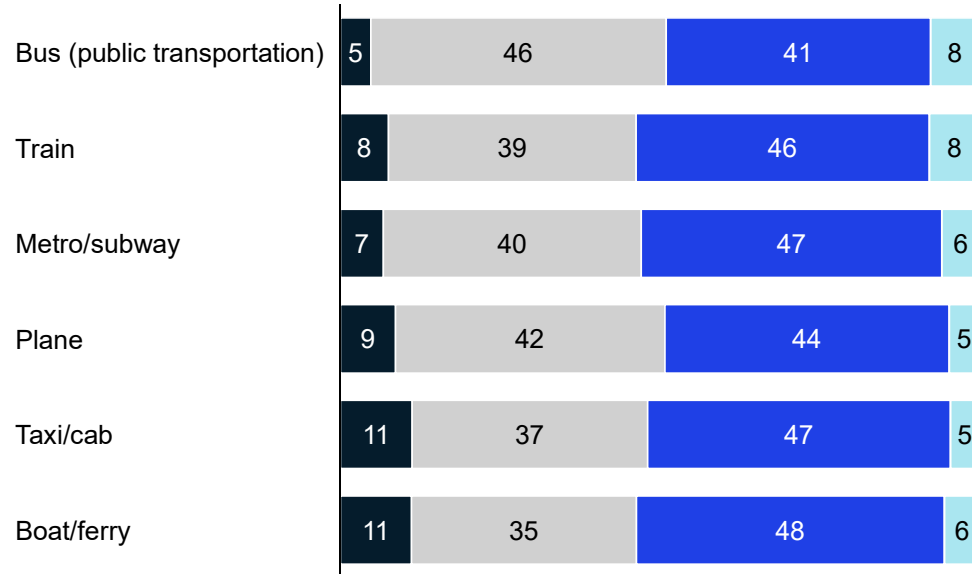
# Consumers plan to reduce and avoid public transport in the mid-future while increasing walking and bicycle

Intent to use the following travel and mobility options available compared to before Corona<sup>1</sup> in the general population in Germany

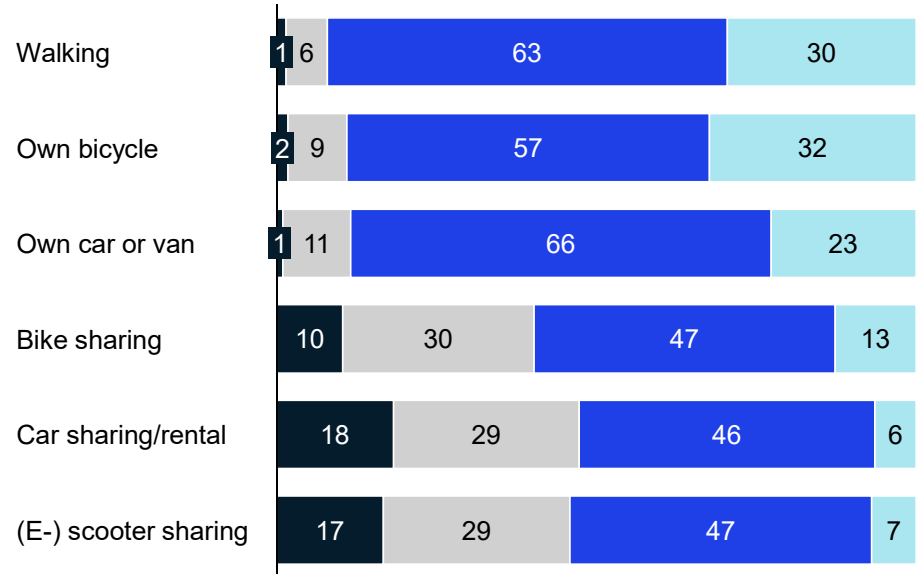
% of respondents

■ Will stop using ■ Use less ■ about the same ■ Use more

## Public transport



## Individual transport



1. Once the current Corona / Covid-19 crisis will be over (and no vaccine is available), how willing are you to use the following travel and mobility options available, compared to before the Corona / Covid-19 situation? Please check one answer for each option

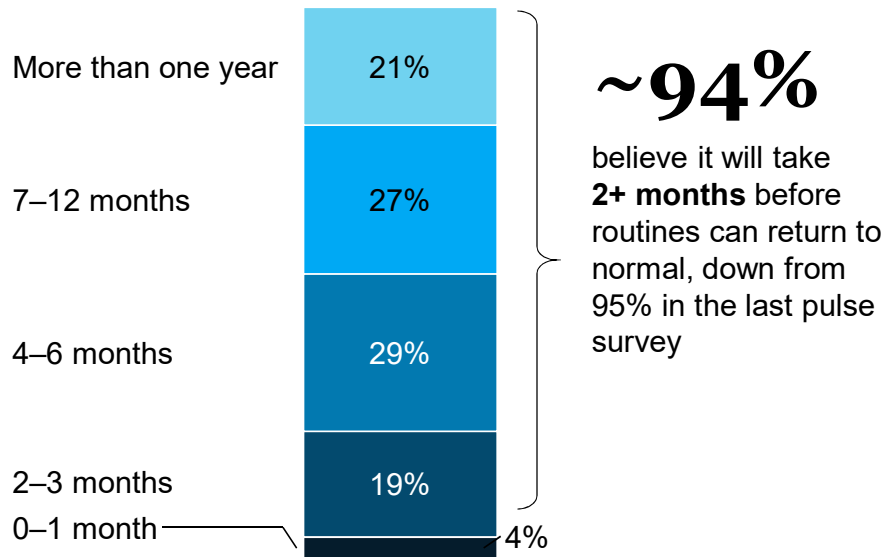




# Most Germans expect routines to be impacted for over 2 month, with just over half expecting a similar timescale for financial impact

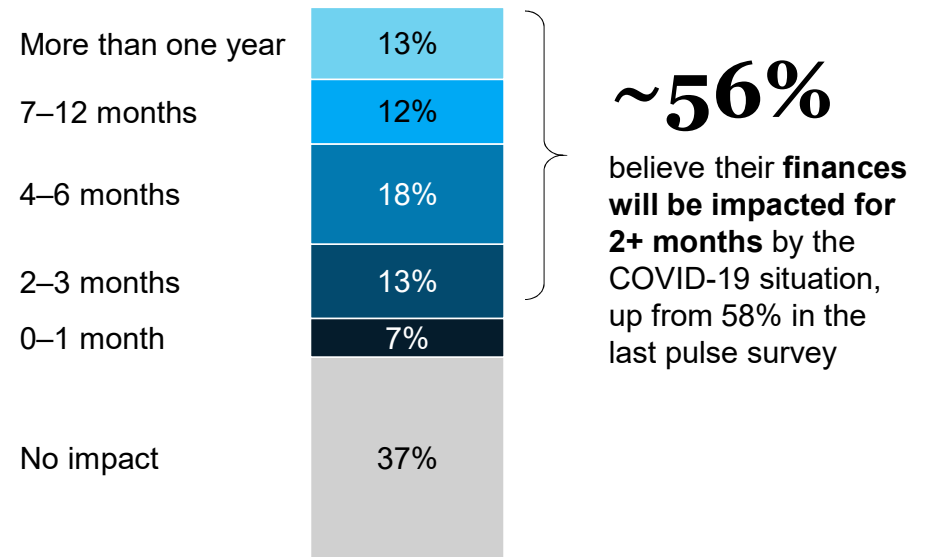
## Adjustments to routines<sup>1</sup>

% of respondents



## Impact on personal/household finances<sup>2</sup>

% of respondents



<sup>1</sup> 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.

<sup>2</sup> 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.

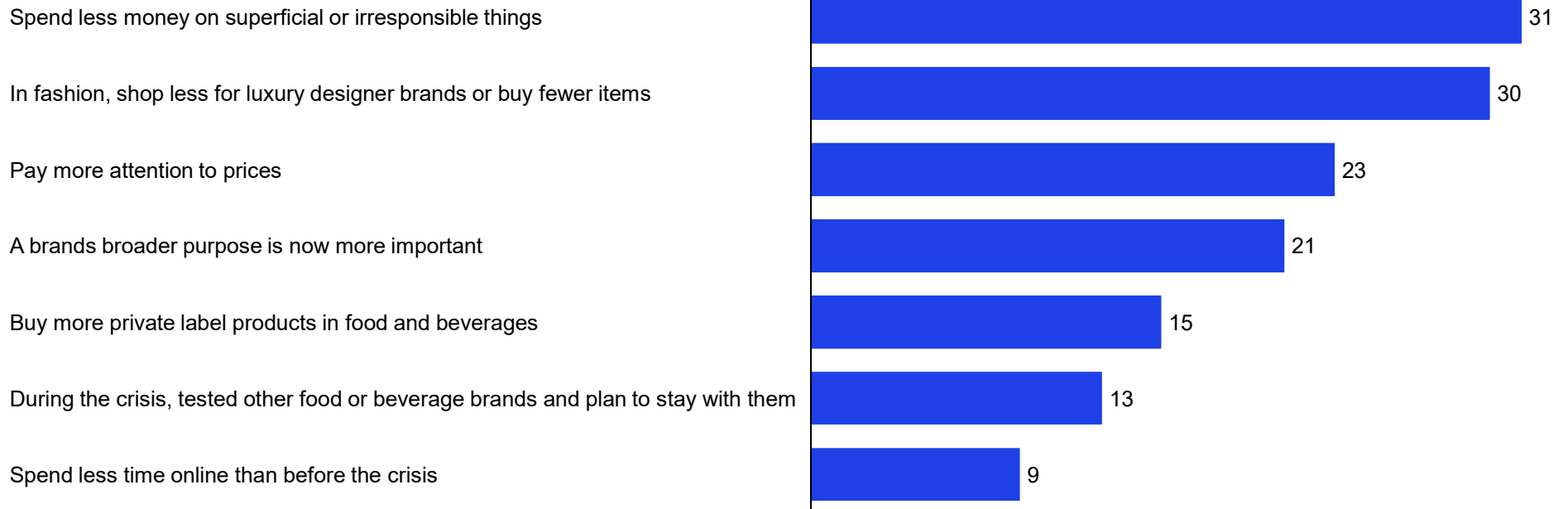


# Consumers plan to spend their money more responsible after the restrictions will be lifted

How have the Corona / Covid-19 restrictions changed the way consumers shop<sup>1</sup> in [COUNTRY]  
% of respondents

■ Agree / strongly agree

Share of respondents who agree or strongly agree



1. Q: How have the Corona / Covid-19 restrictions changed the way you shop? Please select your level of agreement to each of the below statements, thinking about your planned behaviour after the restrictions will be lifted (and no vaccine is available).