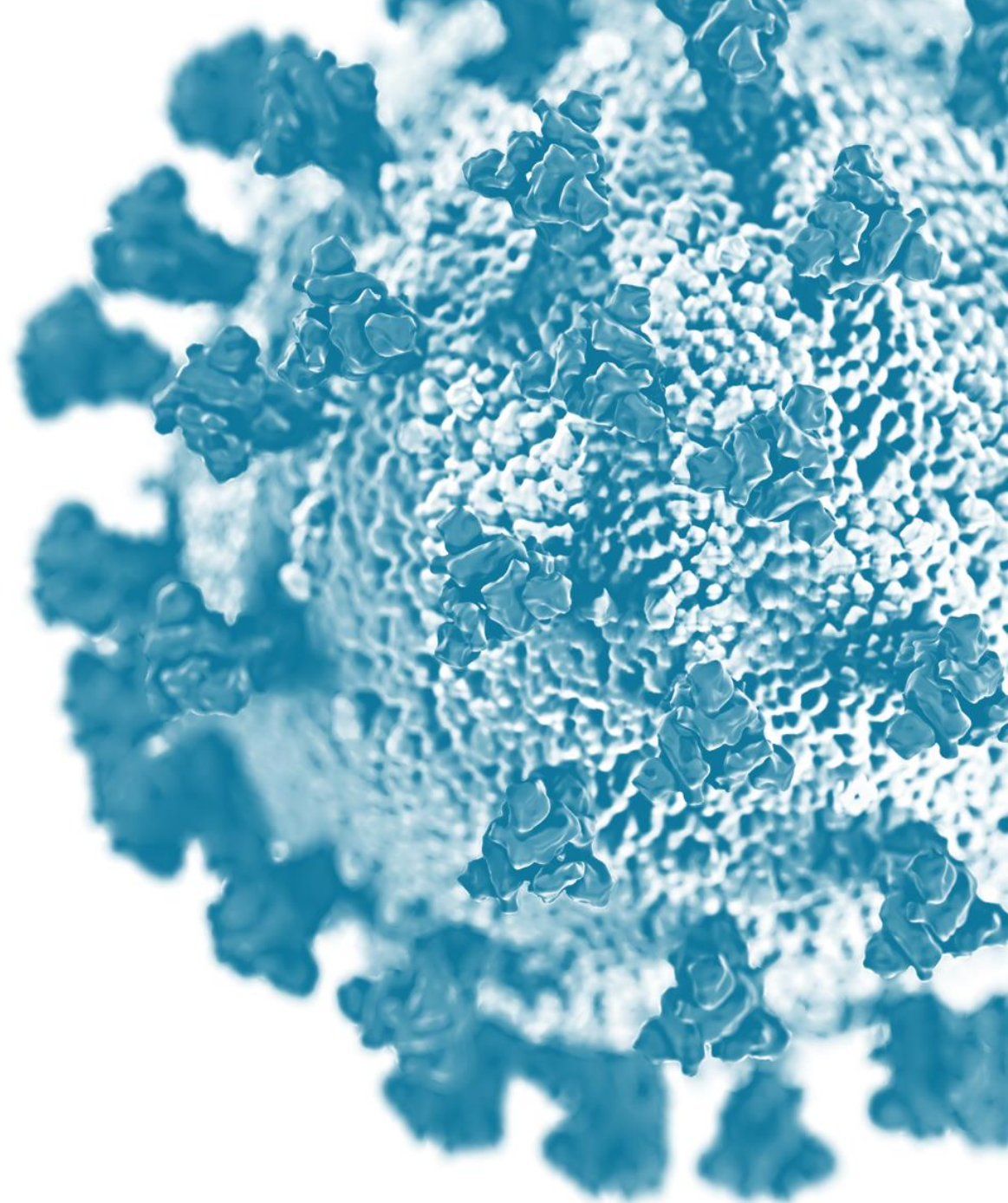


Consumer Brands Association

**CORONAVIRUS WEEKLY
SURVEY RESULTS:
WEEKS 1-8**



AMERICA IS FOREVER CHANGED

The coronavirus pandemic has thrown American life into chaos. Over the last eight weeks, Consumer Brands' coronavirus survey has proven that this new normal is anything but.

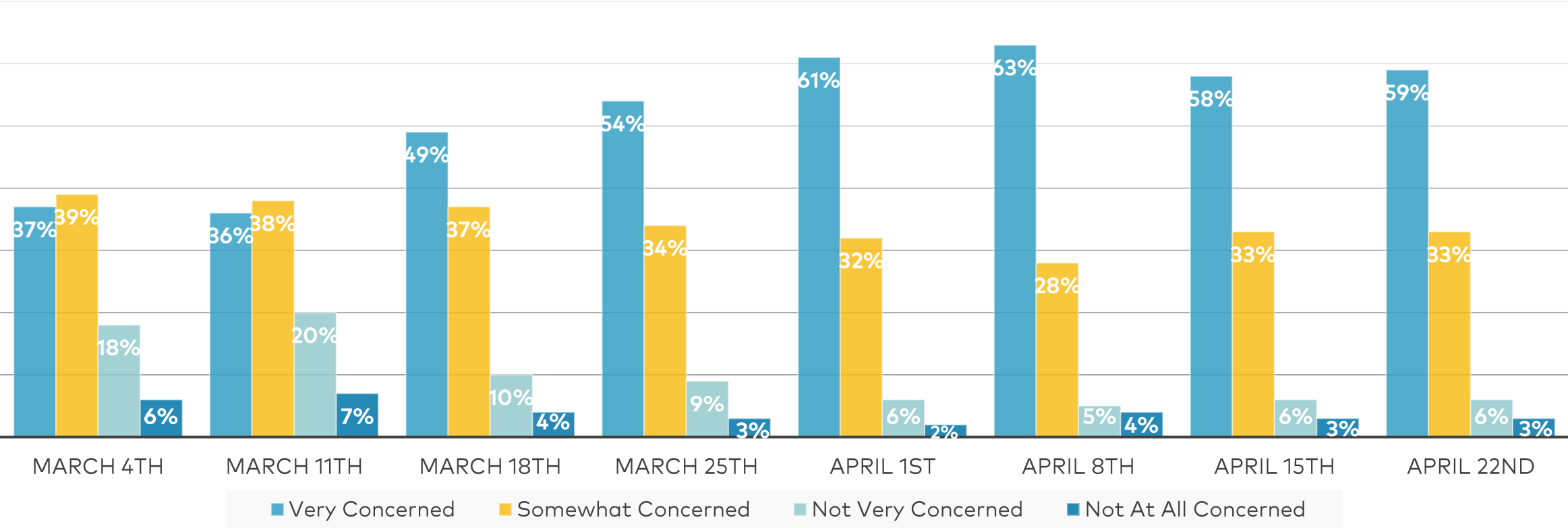
The portrait of how perception has changed over the last eight weeks shows that we may be at a turning point for how Americans feel about coronavirus and its affect on their lives. As moderate concern reached a peak two weeks ago, it has since started to decline and has largely stabilized. Whether that is due to our adaptive abilities or a feeling that hope is on the horizon remains to be seen.

In this week's results we look, for the first time, at the ways who we are affects how we feel about coronavirus. And the most predictive factor of how we feel isn't where we live, our employment status or even our generation — it's our political leaning.



General concern may be at a plateau

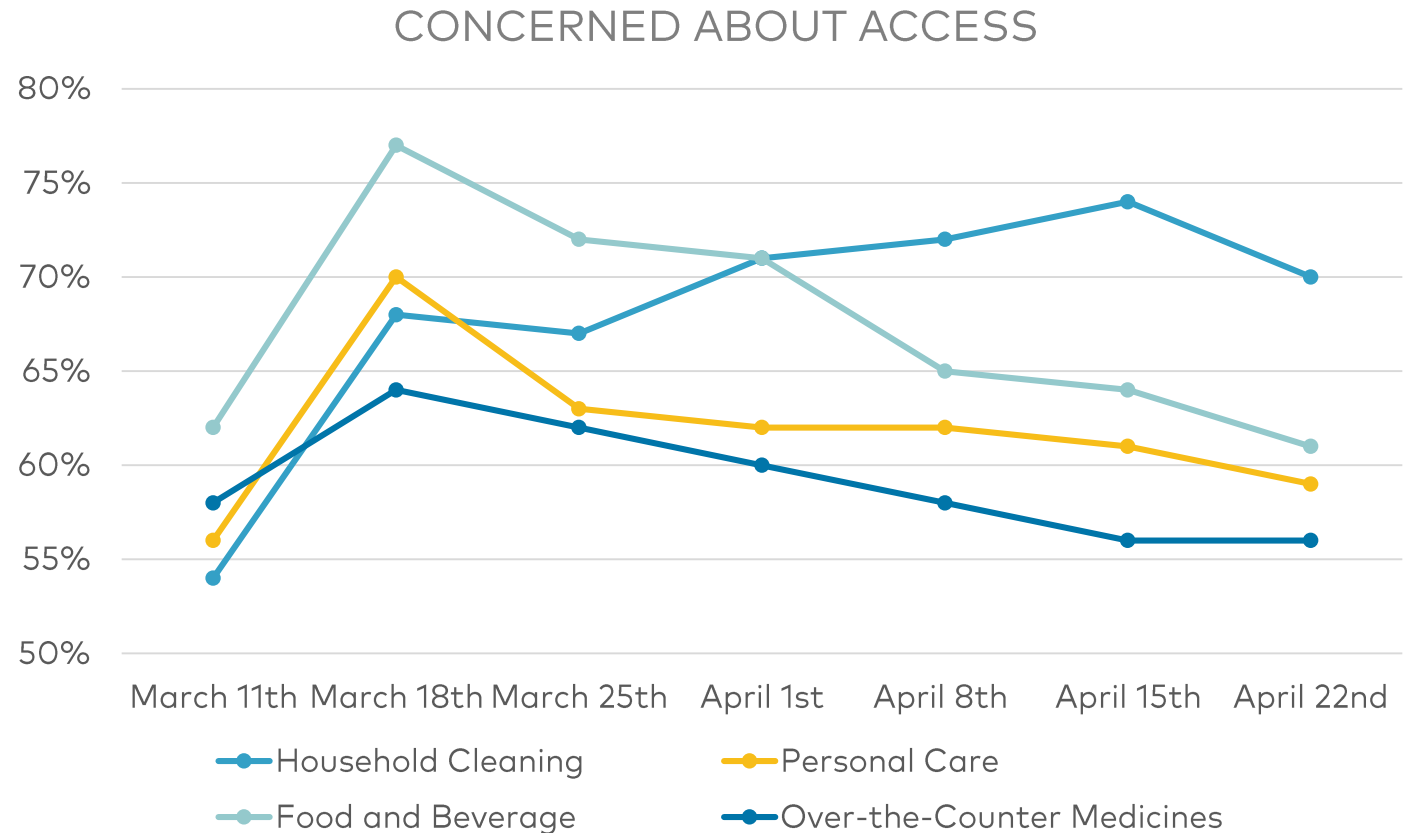
After rising steadily for six weeks, concern dipped and has stabilized. While there is still significant concern about coronavirus and its impact on American life, the most extreme levels of concern have started to shift. The shift follows a period of slightly more positive news and discussions of, not if, but when and how to reopen the country.



Access fears continue to decline

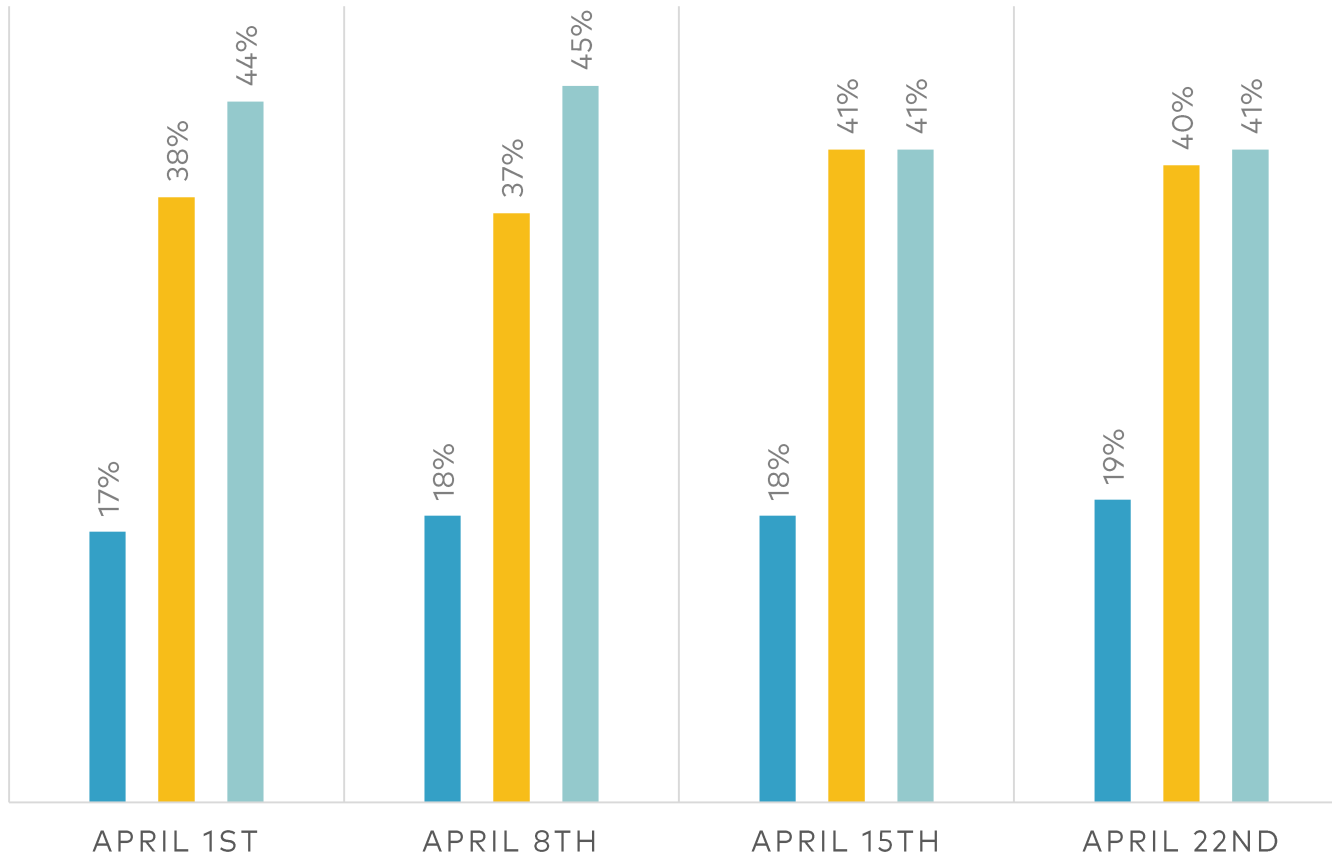
For the first time, concerns over access to every CPG category did not go up. Food and beverage access concerns, which was the top category of concern for several weeks, dropped again to 61 percent — 16 points lower than the peak on March 18. The drop in concern reflects the supply chain working out many of the early kinks and stores restocking many items that were wiped out in March.

Even concerns over access to household cleaning products, which had steadily crept up, began to ease, dropping from 74 percent last week to 70 percent this week. While that's still a strong majority, it is the first decline seen yet.



PERCEIVED AVAILABILITY OF HIGH-DEMAND PRODUCTS

■ Yes, a lot more ■ Yes, on some items ■ No, not yet



Americans are stocked at home and noticing more stock in stores

The vast majority (91%) of Americans are stocked for one week or longer with essential products. Of that group, 44 percent are stocked for two weeks or longer.

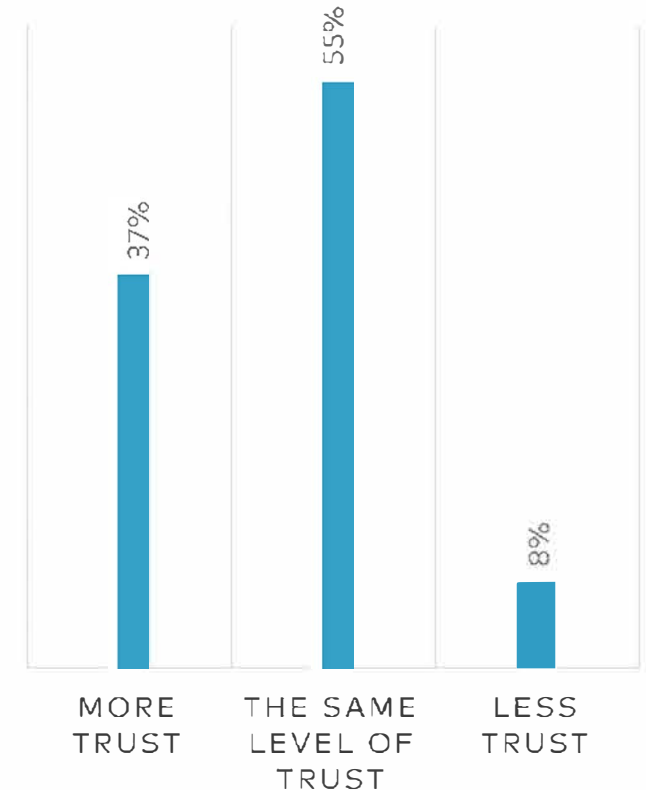
In stores, Americans are also noticing more high-demand products on the shelves. Consistently over the last four weeks of asking the question, a majority of Americans have reported seeing at least some high-demand items back in stock.

Trust in the industry is up, as it continues to deliver for Americans who depend on it more than ever

The pandemic has changed the view of the CPG industry for many Americans. While the majority (55%) said their trust in the industry hadn't changed during the weeks of coronavirus, 37 percent said their trust in the industry had increased. Only eight percent reported less trust.

The importance of trust cannot be understated at this moment, but also as the nation emerges from coronavirus. "Everything is now personal; the business of business is therefore society," wrote Dov Seidman in recent Fortune op-ed. "In the fused world, how we behave, how we operate, how we govern, and how we relate to people and communities matters more than ever. Going forward, businesses are going to compete on trust, on responsibility, and on creating and maintaining deep relationships with their stakeholders rooted in shared truths and values."

TRUST IN THE CPG INDUSTRY

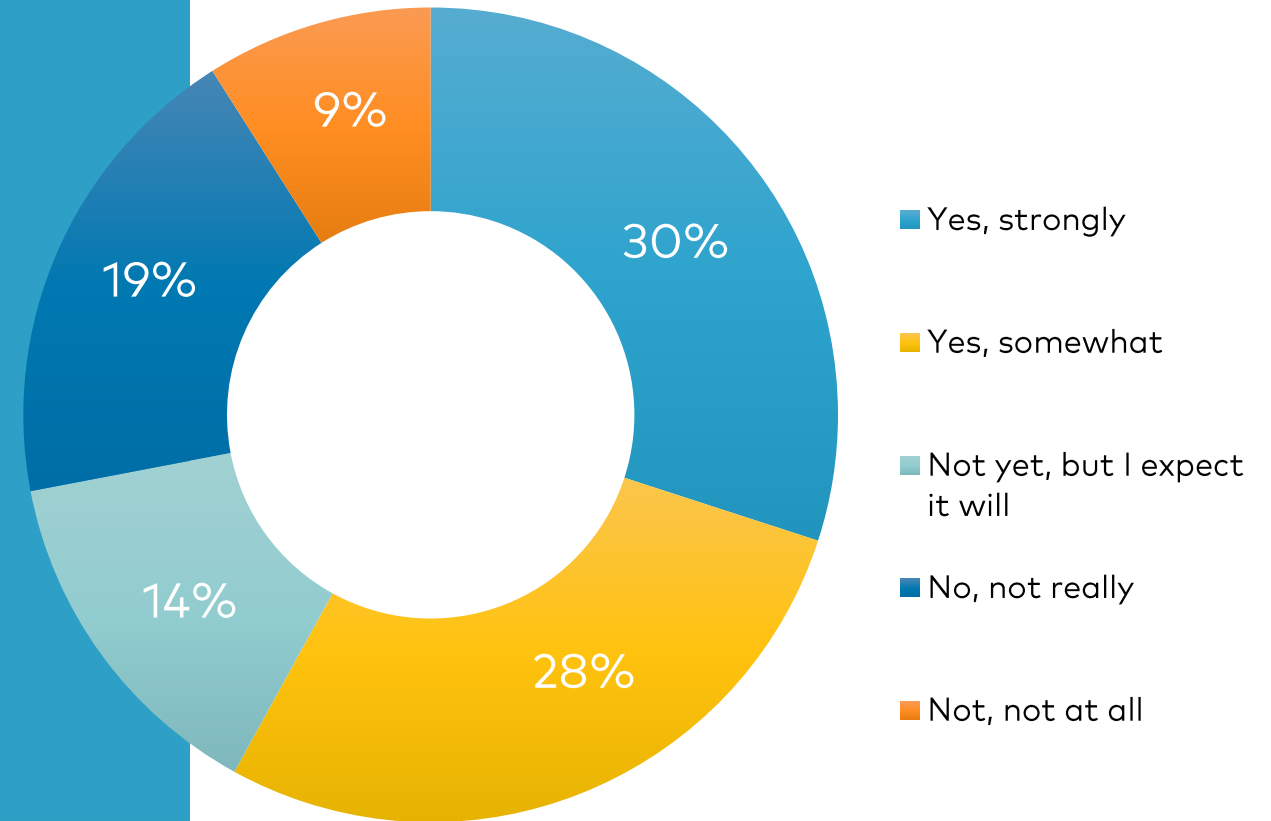


Financial Worries

With a record 26 million Americans filing for unemployment insurance and consistently grim economic news, it is unsurprising that a majority (58%) of Americans say they are at least somewhat concerned about their family's ability to pay bills or afford necessities.

Those Americans whose jobs have been affected by COVID-19—whether they were let go, furloughed or had hours or pay reduced—have more intense worries than those who are still employed full-time. Nearly three-quarters (74%) of those who have jobs negatively impacted by coronavirus say they are worried about their family's ability to pay bills or afford necessities. More than six-in-ten (62%) of those who are employed full-time say the same — a significantly lower number, but still a clear majority, showing how anxious even employed Americans feel right now.

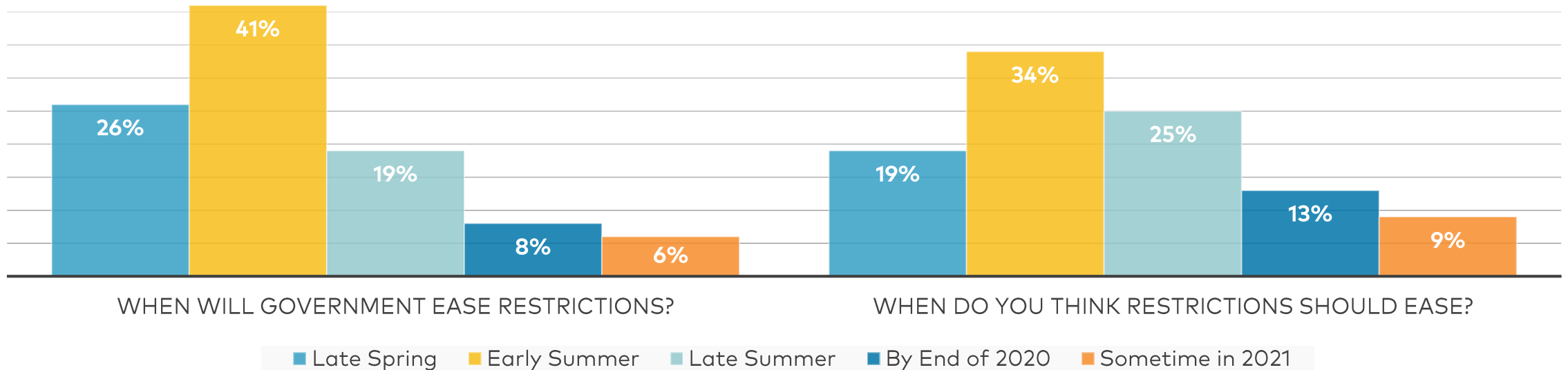
CONCERN ABOUT ABILITY TO PAY BILLS OR AFFORD NECESSITIES



Most Americans feel government will move to reopen before they should

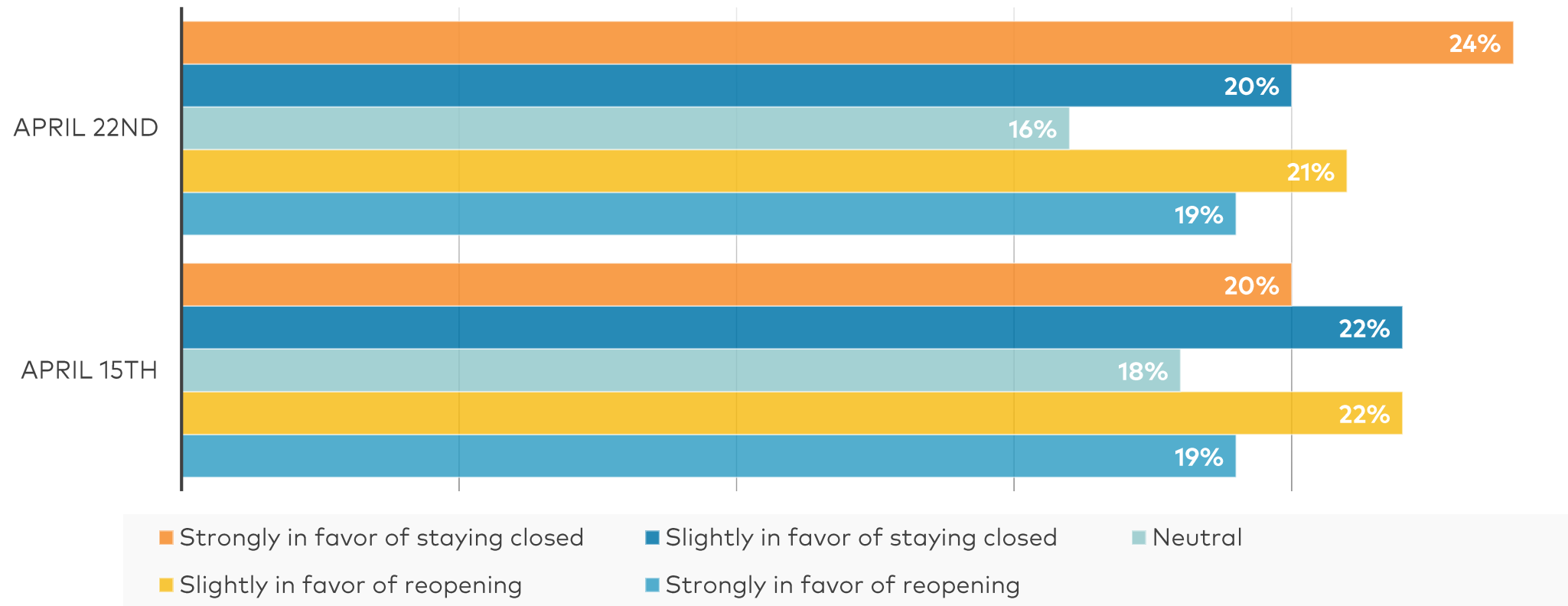
Most Americans feel that the government will move to ease restrictions well before people personally feel they should. The most popular response of when Americans felt the government would reopen the country was early summer, which is also the most popular choice for when respondents personally felt it would be time to lift restrictions, but by a significantly smaller margin (41% to 34%).

While there was little shift from last week with regard to when government would move to reopen, there was greater movement in respondents' personal feelings. Last week, 26 percent said they felt restrictions should ease by late spring; in just a week, that number dropped to 19 percent.



Divided debate swings toward staying closed

Last week, America was near-equally divided in the debate over reopening for the sake of the economy or staying closed in the interest of public health. This week shows movement toward staying closed for public health, as fewer Americans remain neutral in their opinion.



Demographics show we're more alike than different

Differences in where we live, employment status and generation have relatively little bearing on how we feel about coronavirus. If anything, the numbers show a country more unified in the fight against a common enemy. A few key distinctions are noted below.

The one demographic area, however, that showed significant differences of opinion was based on political leanings. Left-leaning Americans show much higher rates of general concern about coronavirus, less security in their financial situation and a greater inclination to stay closed for public health, when compared to right-leaning Americans. As this pandemic continues, the data suggest politics will take on a heavy role in shaping the public debate.

Boomers are the generation most likely to favor staying closed for public health over reopening the economy.

55% of Boomers are in favor of staying closed, compared to 44% of Gen X and 38% of Millennials.

Americans in the Midwest were most likely to report being let go or furloughed because of coronavirus.

20% of respondents in the Midwest have been laid off or furloughed, compared to 16% in the Northeast, 15% in the South and 12% in the West.

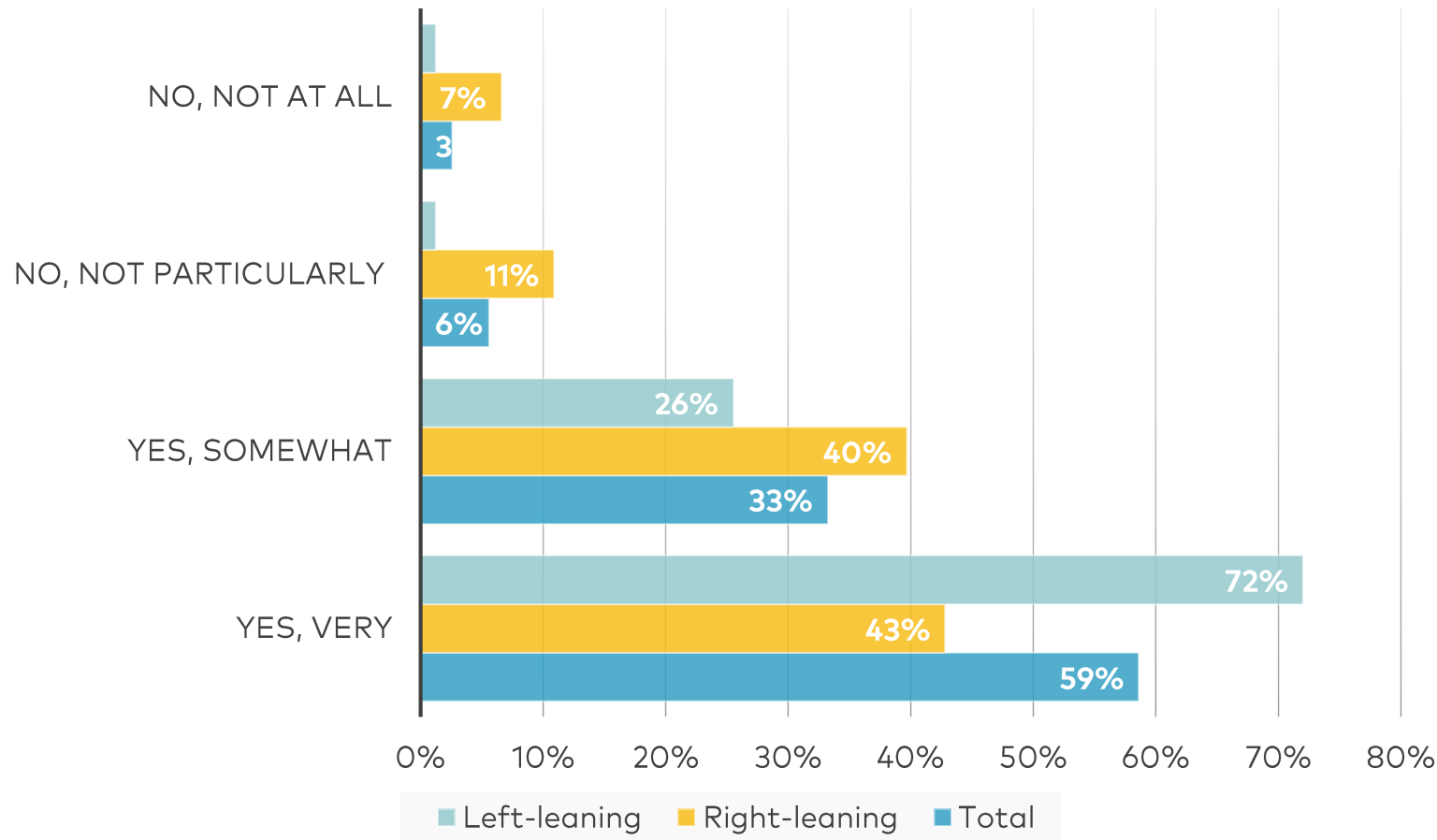
Negative employment effects from coronavirus increase financial hardship.

74% of Americans who have been let go, furloughed or lost hours or wages are worried about paying bills and affording necessities, compared to 62% of full-time employed respondents.

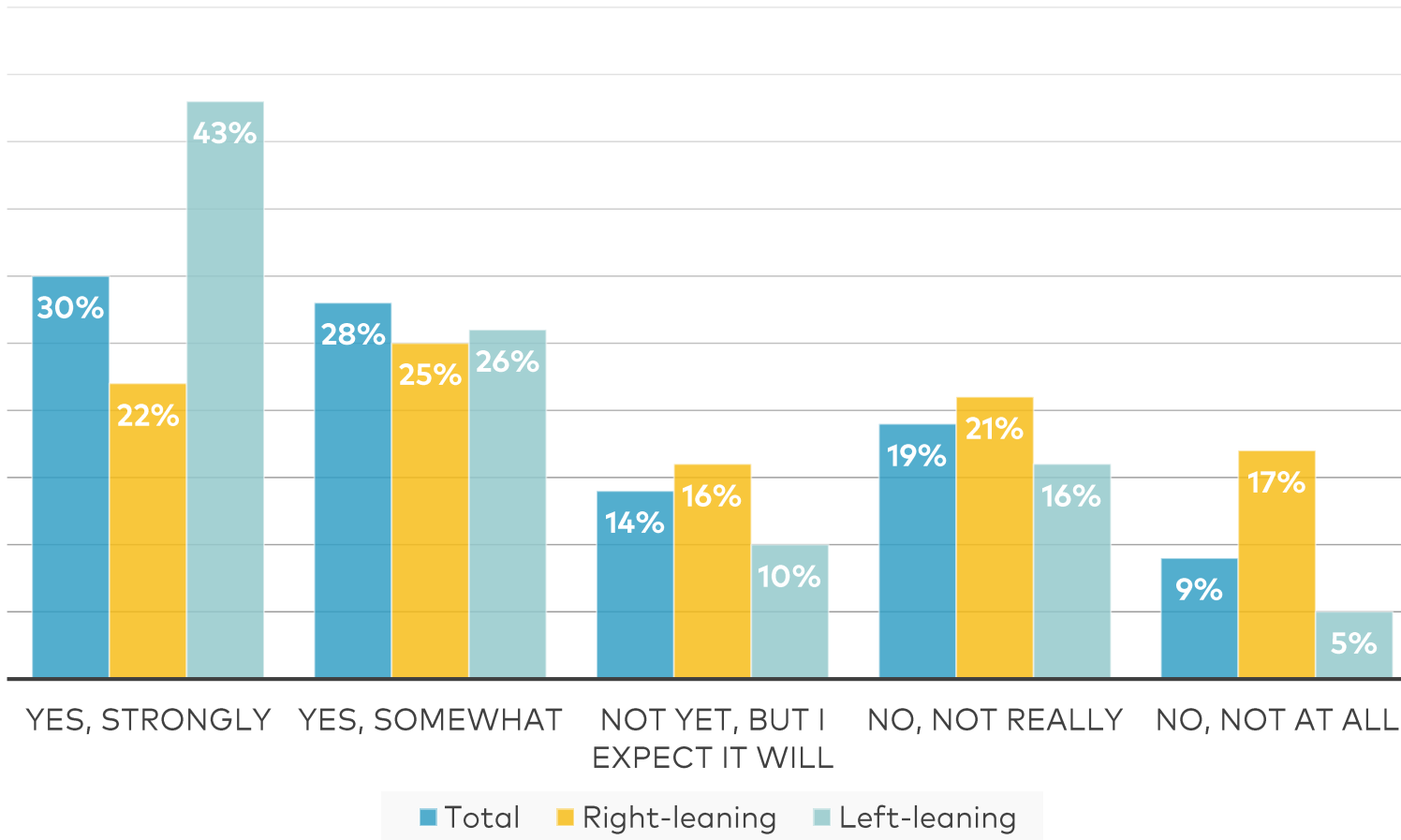
How Americans feel about coronavirus is influenced by their politics

Political leanings have significant bearing on how Americans feel about the coronavirus pandemic and when life after the pandemic should begin. Concern is dramatically higher with left-leaning Americans, 72 percent of whom say they are "very concerned" about coronavirus, compared to only 43 percent of right-leaning respondents.

LEVEL OF GENERAL CONCERN ABOUT CORONAVIRUS



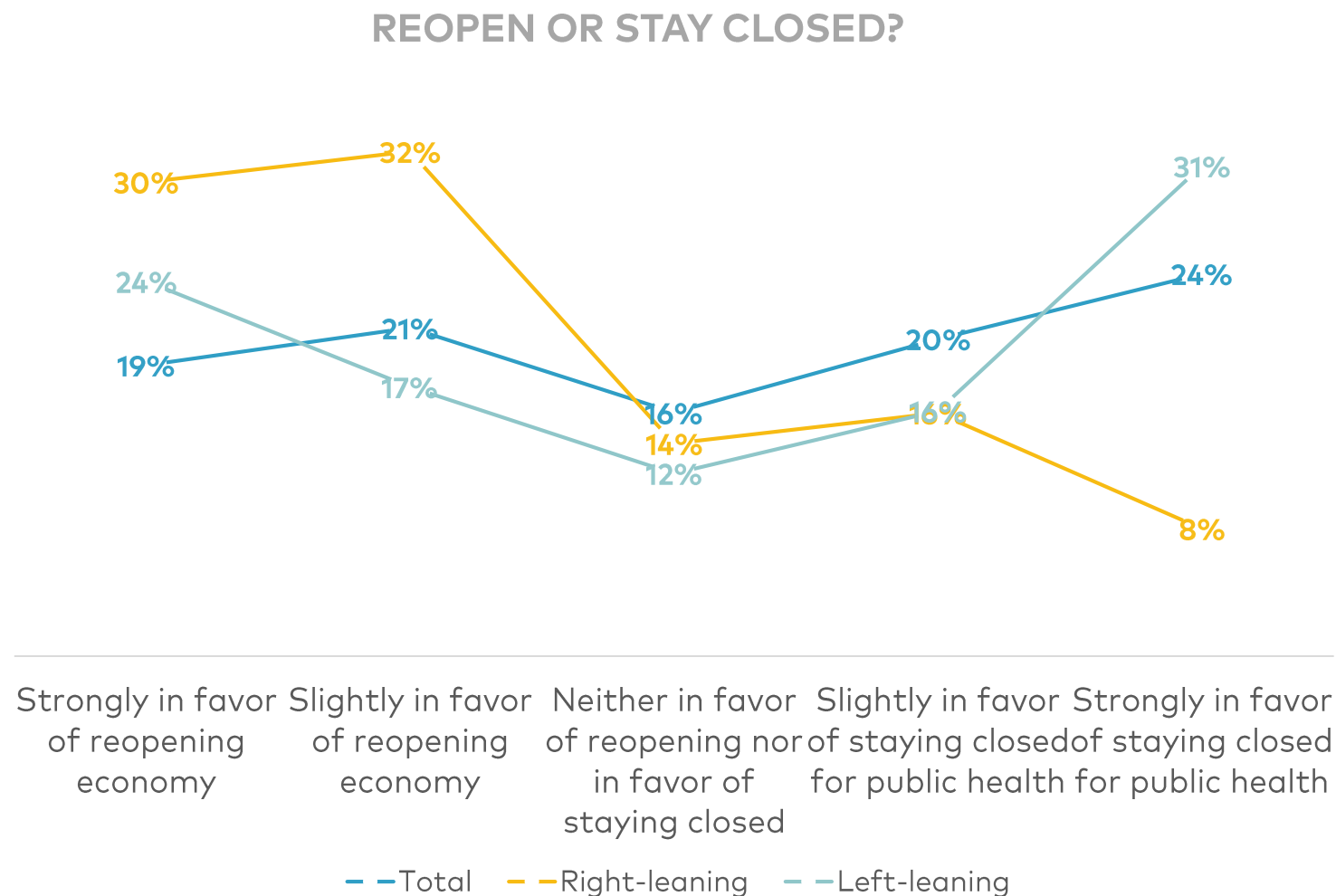
CURRENT OR EXPECTED FINANCIAL HARDSHIP



Left-leaning Americans experiencing more financial hardship

Left-leaning Americans report suffering some of the economic consequences of coronavirus more acutely. They are far more likely to say that the pandemic has strongly affected their family's ability to pay bills and afford necessities (43% of left-leaning respondents compared to 22% of right-leaning).

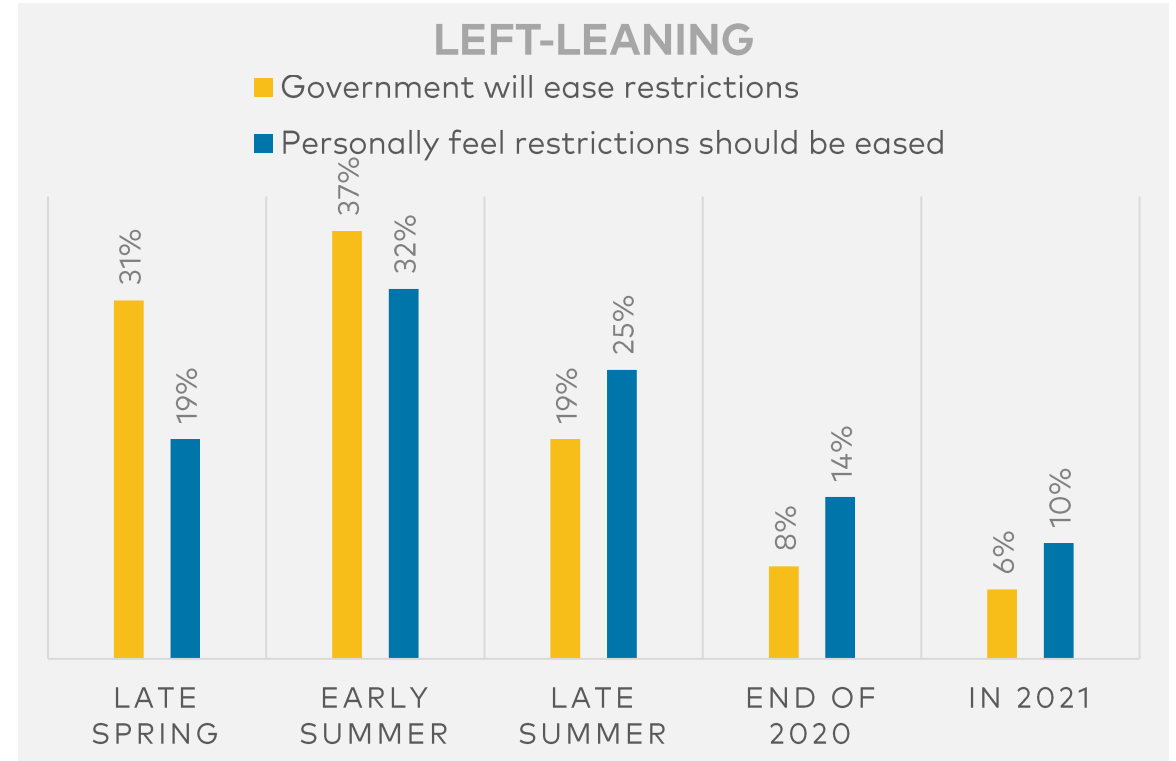
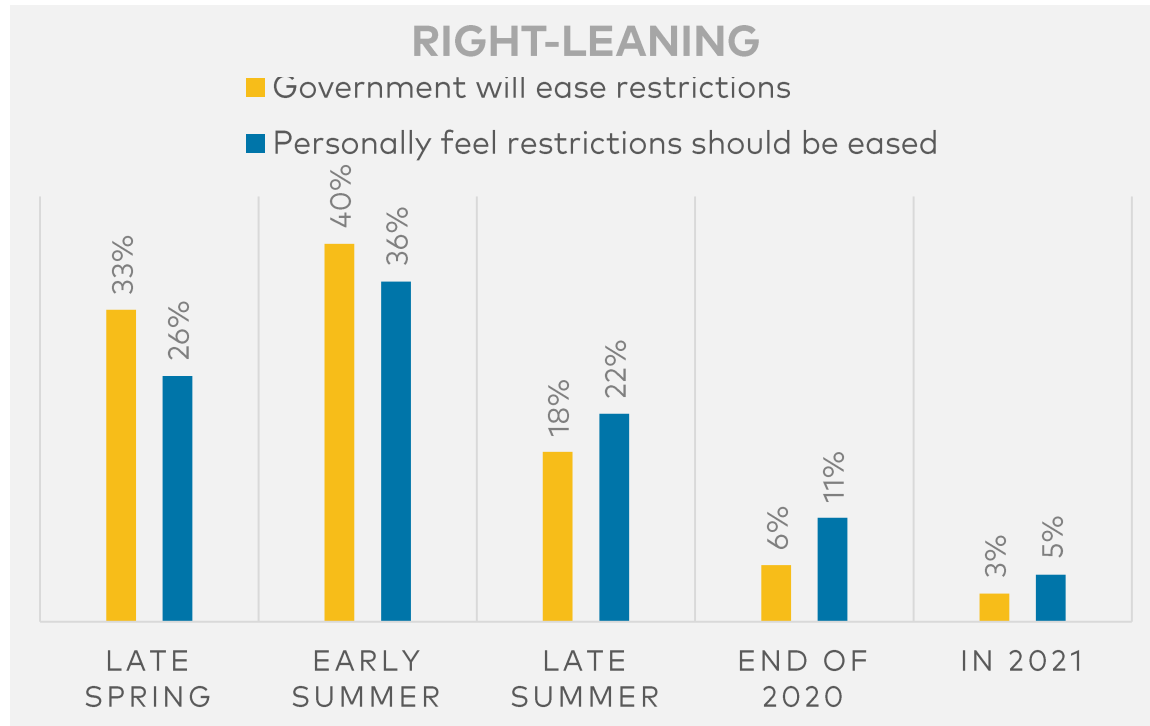
Divided America on the debate over reopening or staying closed



Despite the reported economic hardship, left-leaning Americans were far less likely than right-leaning respondents to want to reopen the country's economy. A minority (41%) of left-leaning respondents say in the debate over whether to reopen for the sake of the economy or stay closed to protect public health that they are at least slightly in favor of reopening, compared to a majority (63%) of right-leaning Americans.

Left or right, Americans willing to wait longer than government

Right and left-leaning Americans are much closer together about when they personally feel the country should ease restrictions in place now to mitigate against the spread of coronavirus. While there are still differences, 62 percent of right-leaning Americans personally feel the government should ease restrictions by late spring or early summer, compared to 51 percent of left-leaning respondents. Both groups also feel the government will move to ease restrictions before they think it should, with 67 percent of right-leaning and 63 percent of left-leaning Americans responding that the government would end lockdowns by late spring or early summer.



METHODOLOGY

Consumer Brands Association has conducted eight surveys of American adults (18+), with a margin of error of +/- 2.4%, powered by Toluna.

March 4: 604 adults

March 11: 709 adults

March 18: 711 adults

March 25: 926 adults

April 1: 1,453 adults

April 8: 1,018 adults

April 15: 1,020 adults

April 22: 1,128 adults