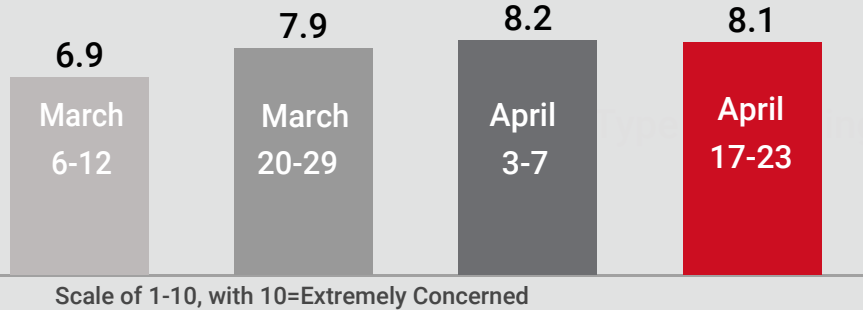
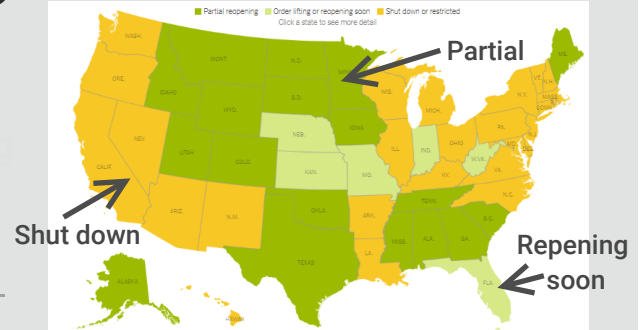


4th Edition: Research conducted April 17-23, 2020

COVID-19 Concern Is Leveling

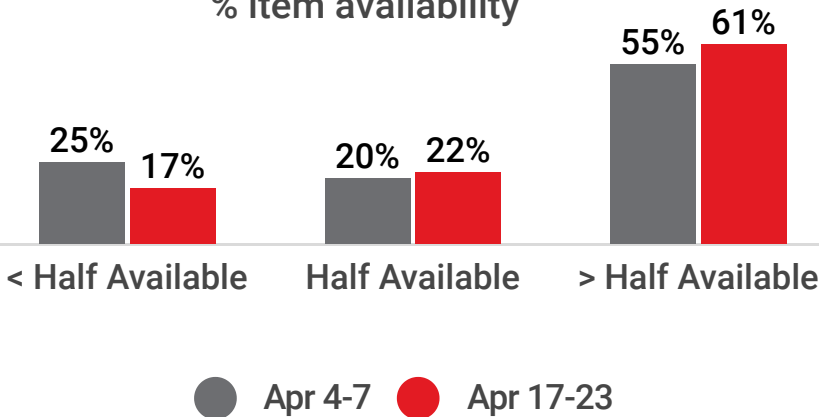


State Reopening Map Week of 5/4



Product Availability Remains an Issue

% item availability



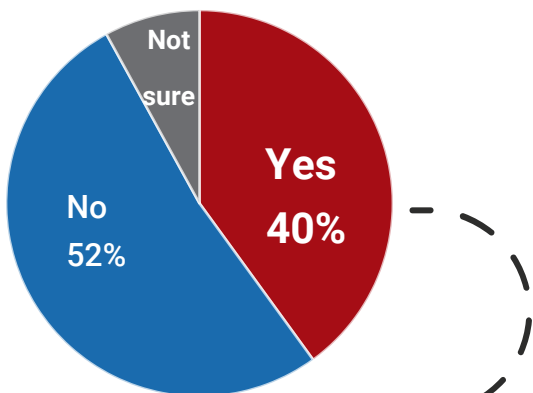
% of shoppers who found acceptable substitutes for at least half of the items



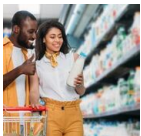
Store Brands Are a Good Alternative for Shoppers

WHY?

Are you buying more store brands since the outbreak?



Millennials



56%

Boomers



29%

57%



To substitute for my usual brand

35%



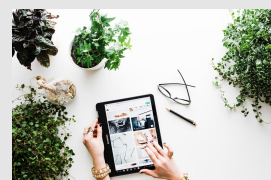
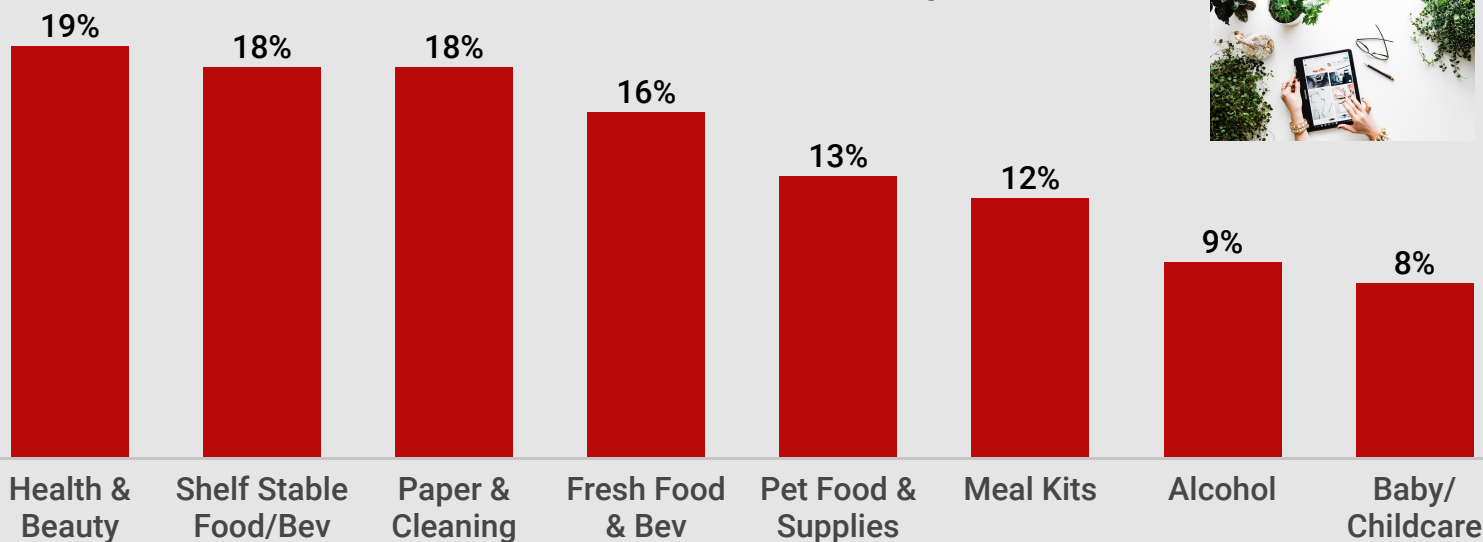
To save money

63% will stick with at least some store brands post-pandemic

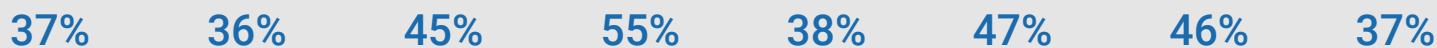
Online Subscriptions Are Becoming More Popular

38% of shoppers placed an online subscription order in the past 4 weeks

% items received via online subscriptions



% first-ever subscription



Navigating the Transition to a New Normal

Coming Out of the Crisis

- * Phased reopening of the economy
- * Fewer store trips, more stock-ups
- * Shelf and assortment recovery
- * Potential product shortages
- * Select price increases
- * Store brand share gains
- * Re-planned promotions
- * COVID-19 resurgence watch

Managing the New Normal

- * Accelerated e-commerce
- * CPG auto-replenishment spikes
- * Cautionary non-essential spending
- * Increased deal-seeking
- * More food at home occasions
- * Heightened safety measures in store
- * Supply chain focus to balance in store vs. online

SOURCES: Acosta Custom Shopper Surveys, April 17-23; April 3-7, 2020; March 20-29, 2020; March 6-12, 2020; MAP NY Times 5-1-20

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