

IDFA International

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Dairy Foods Association

July 2020

MORNING CONSULT

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Eighty-four percent of voters report they have excellent or good access to a grocery store, while 16% report they do not.

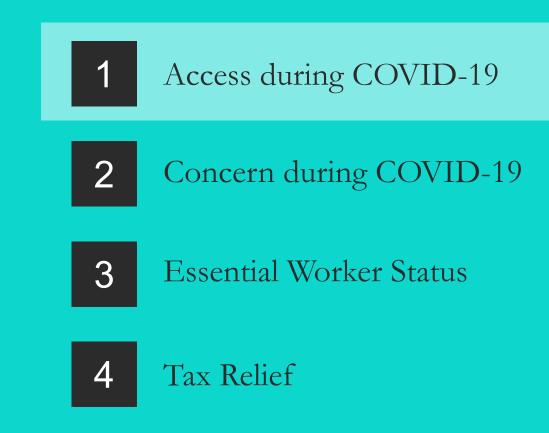
2 Voters report high levels of concern for grocery store workers, agriculture and food production workers, farm workers, and vehicle and machinery workers during COVID-19.

Nine in ten voters agree that grocery store workers (93%), agricultural and food production workers (90%) and farm workers (89%) are essential workers.

• Three-quarters (74%) of voters agree vehicle and machinery workers are essential workers.

Two-thirds or more of voters support providing tax relief to grocery store workers, farm workers, agricultural and food production workers, and vehicle and machinery workers.

Methodology: This poll was conducted between July 14-July 16, 2020 among a national sample of 1993 Registered Voters. The interviews were conducted online and the data were weighted to approximate a target sample of Registered Voters based on gender, educational attainment, age, race, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.



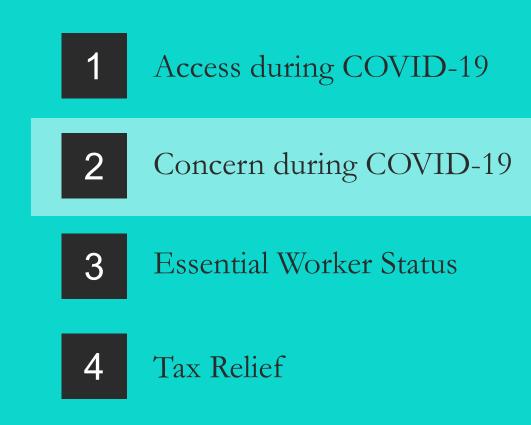
ACCESS DURING COVID-19

Eighty-four percent of voters report they have excellent or good access to a grocery store, while 16% report they do not.

How would you rate your access to the following during the coronavirus (COVID-19) pandemic?



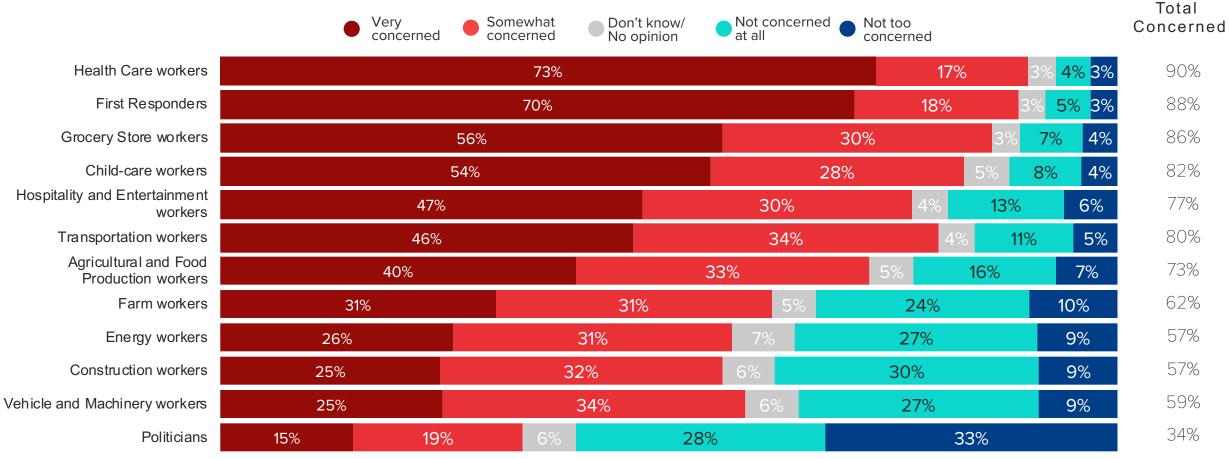
NET= (Excellent + Good) - (Fair + Poor)





Voters report high levels of concern for grocery store workers, agriculture and food production workers, farm workers, and vehicle and machinery workers during COVID-19.

How concerned are you for the following groups of workers during the coronavirus (COVID-19) pandemic?



Total Concerned= Very + Somewhat concerned

Voters across the political spectrum are concerned for agricultural and food production workers during the coronavirus (COVID-19) pandemic.

How concerned are you for the following groups of workers during the coronavirus (COVID-19) pandemic? Agricultural and Food Production Workers

	 Very concerned Somewhat concerned 	 Don't know/ No opinion Not concerned at all 	 Not too concerned 			Total Concerne
Registered Voters	40%	33%	5%	16 %	7%	73%
Male	35%	34%	6%	17%	8%	69%
Female	43%	32%	4%	15%	6%	75%
GenZers: 1997-2012	34%	25% 10%	2	3%	8%	59%
Millennials: 1981-1996	38%	36%	5%	16%	5%	74%
GenXers: 1965-1980	38%	32%	5%	15%	10%	70%
Baby Boomers: 1946-1964	42%	34%	4%	15%	<mark>6 5</mark> %	76%
Democrat	51%	30%		3%	13% 3%	81%
Independent	37%	34%	6%	17%	7%	71%
Republican	29%	36% 5%	2	0%	10%	65%
Urban	43%	31%	6%	13%	7%	74%
Suburban	38%	34%	4%	18%	5%	72%
Rural	40%	33%	5%	15%	9%	73%
Northeast	39%	35%	5%	15%	<mark>6 5</mark> %	74%
Midwest	42%	30%	3%	18%	7%	72%
South	39%	31%	6%	17 %	6%	70%
West	39%	38%	4%	12%	8%	77%

Voters across the political spectrum indicate high levels of concern for farm workers. Additionally, more than half of voters across key demographics report they are concerned for them.

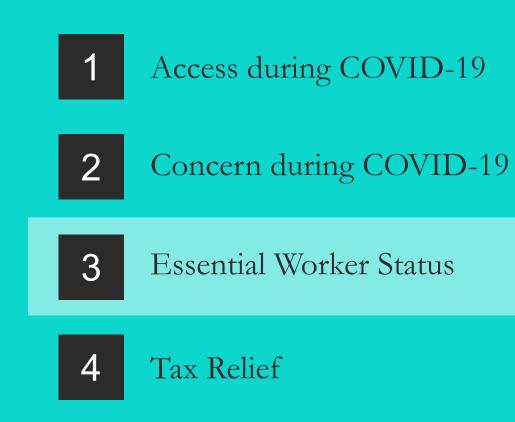
How concerned are you for the following groups of workers during the coronavirus (COVID-19) pandemic? *Farm workers*

	Very concerned	Somewhat Don't know/ concerned No opinion	Not concerned at all	 Not too concerned 		Total Concerned
Registered Voters	31%	31%	5%	24%	10%	62%
Male	27%	31%	5%	25%	12%	58%
Female	35%	31%	49	% 22%	8%	66%
GenZers: 1997-2012	28%	26%	8%	23%	15%	54%
Millennials: 1981-1996	32%	31%	5%	24%	9%	63%
GenXers: 1965-1980	32%	27%	5%	23%	12%	59%
Baby Boomers: 1946-1964	31%	33%	4%	25%	7%	64%
Democrat	40%		30%	4% 20%	5%	70%
Independent	28%	32%	6%	22%	11%	60%
Republican	22%	31%	5%	29%	13%	53%
Urban	33%	32%	6	% 21%	8%	65%
Suburban	30%	31%	4%	25%	9%	61%
Rural	30%	29%	6%	23%	12%	59%
Northeast	29%	31%	5%	24%	11%	60%
Midwest	28%	33%	4%	27%	9%	61%
South	31%	31%	6%	23%	9%	62%
West	36%	29%	3%	21%	10%	65%

Voters, across key demographics, indicate a high level of intense concern for grocery store workers. Very few voters report they are not concerned for them.

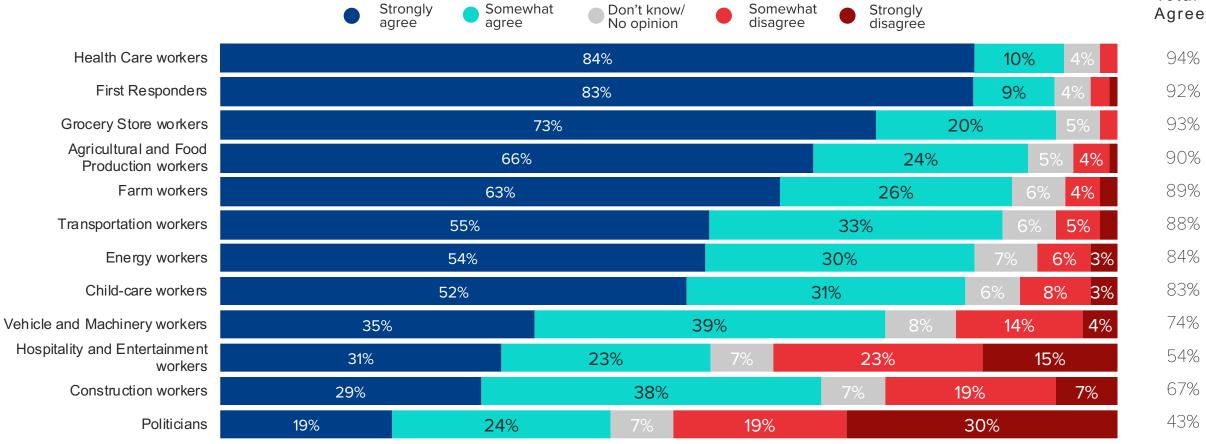
How concerned are you for the following groups of workers during the coronavirus (COVID-19) pandemic? Grocery store workers

	 Very Somewhat On' No o 	't know/ Not concerned Not too oncerne	d Total Concerned
Registered Voters	56%	30%	3% 7% 4% 86%
Male	48%	34%	3% 9% 5 % 82%
Female	62%	27%	
GenZers: 1997-2012	52%	25%	8% 6% 9 % 77%
Millennials: 1981-1996	52%	34%	4% 8% 4 % 86%
GenXers: 1965-1980	53%	32%	2% <mark>7%6</mark> %85%
Baby Boomers: 1946-1964	60%	29%	<mark>2% 7% 2</mark> % 89%
Democrat	68%		26% 2% <mark>3%</mark> % 94%
Independent	53%	28%	4% 9% 6% 81%
Republican	44%	37%	3% 10% 6% 81%
Urban	55%	30%	3% 7% 5% 85%
Suburban	57%	31%	2% <mark>7%3%</mark> 88%
Rural	54%	30%	4% 7% 5% 84%
Northeast	56%	29%	3% <mark>8%5</mark> %85%
Midwest	57%	29%	2% <mark>8%</mark> 3%86%
South	54%	31%	4% <mark>6% 4</mark> % 85%
West	56%	31%	1 <mark>% 7% 5%</mark> 87%
		Total Concorredt 1/0	ry I Compythet concerned



Nine in ten voters agree that grocery store workers (93%), agricultural and food production workers (90%) and farm workers (89%) are essential workers.

Based on what you know, do you agree or disagree the following groups of workers are essential workers amidst the coronavirus (COVID-19) pandemic? Total



Total Agree= Strongly + Somewhat agree

Nearly nine in ten of voters across key demographics agree agricultural and food production workers are essential workers.

Based on what you know, do you agree or disagree the following groups of workers are essential workers amidst the coronavirus (COVID-19) pandemic? Agricultural and Food Production Workers

	Strongly Somewhat Don't know/ agree Agree No opinion	 Somewhat disagree 	at Strongly disagree		Total Agree
Registered Voters	66%		24%	5% 4%	90%
Male	61%		28%	5% 5%	89%
Female	70%		20%	6% <mark>3%</mark>	90%
GenZers: 1997-2012	56%		24%	14% 6%	80%
Millennials: 1981-1996	60%		26%	8% 5%	86%
GenXers: 1965-1980	65%		25%	5% <mark>3%</mark>	90%
Baby Boomers: 1946-1964	71%		22	<mark>2%</mark> 3% <mark>3%</mark>	93%
Democrat	66%		24%	4% 5%	90%
Independent	66%		23%	7% 3%	89%
Republican	65%		25%	5% <mark>3%</mark>	90%
Urban	61%		27%	7% 5%	88%
Suburban	67%		23%	5% 3%	90%
Rural	68%		23%	5% 4%	91%
Northeast	65%		27%	5% <mark>2%</mark>	92%
Midwest	69%		22%	5% 4%	91%
South	64%		25%	6% 4%	89%
West	66%		22%	6% 5%	88%

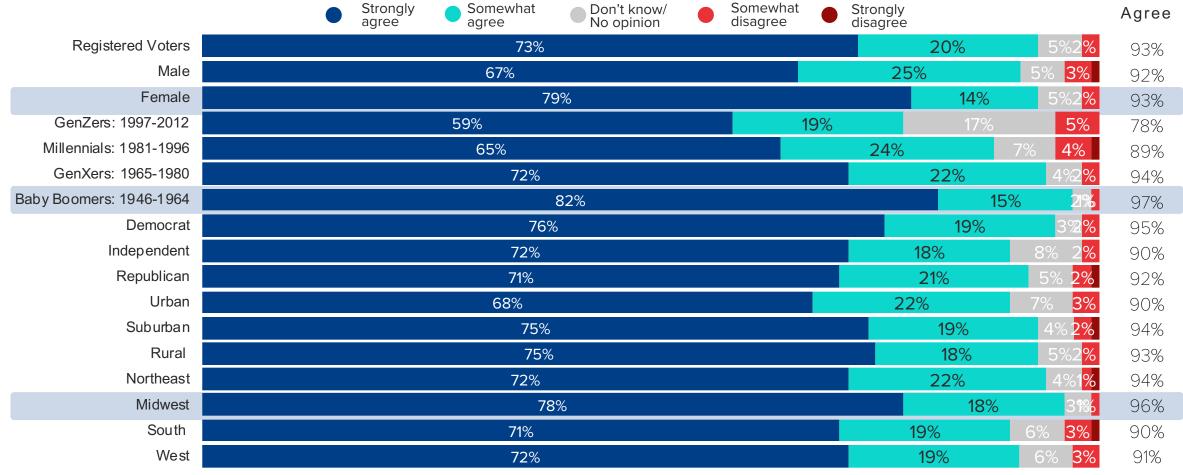
Democrats and Republicans both strongly agree that farm workers are essential workers.

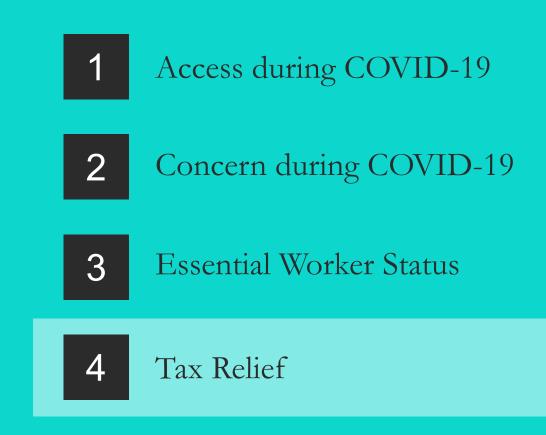
Based on what you know, do you agree or disagree the following groups of workers are essential workers amidst the coronavirus (COVID-19) pandemic? Farm workers

	Strongly Somewhat Don't know/ agree Agree No opinion	Somewhat disagree	• Strongly disagree		Total Agree
Registered Voters	63%		26%	6% 4%	89%
Male	58%		31%	5% 5%	89%
Female	68%		22%	6% <mark>3%</mark>	90%
GenZers: 1997-2012	50%	23%	18%	7%	73%
Millennials: 1981-1996	59%		26%	8% 5%	85%
GenXers: 1965-1980	64%		26%	4% 3%	90%
Baby Boomers: 1946-1964	68%		24%	3% <mark>3%</mark>	92%
Democrat	63%		28%	4% 4%	91%
Independent	63%		23%	9% 4%	86%
Republican	63%		26%	5% 4%	89%
Urban	58%		27%	8% 6%	85%
Suburban	66%		24%	5% 4%	90%
Rural	64%		27%	6% <mark>2%</mark>	91%
Northeast	64%		25%	5% 4%	89%
Midwest	65%		26%	5% <mark>3%</mark>	91%
South	62%		26%	7% 4%	88%
West	63%		26%	5% 4%	89%

While a strong majority of all voters across key demographics agree grocery store workers are essential workers, Women, Baby Boomers, and Midwest voters agree the strongest. Additionally, there is cross- party consensus on extending essential worker status to grocery store workers.

Based on what you know, do you agree or disagree the following groups of workers are essential workers amidst the coronavirus (COVID-19) pandemic? Grocery store workers Total



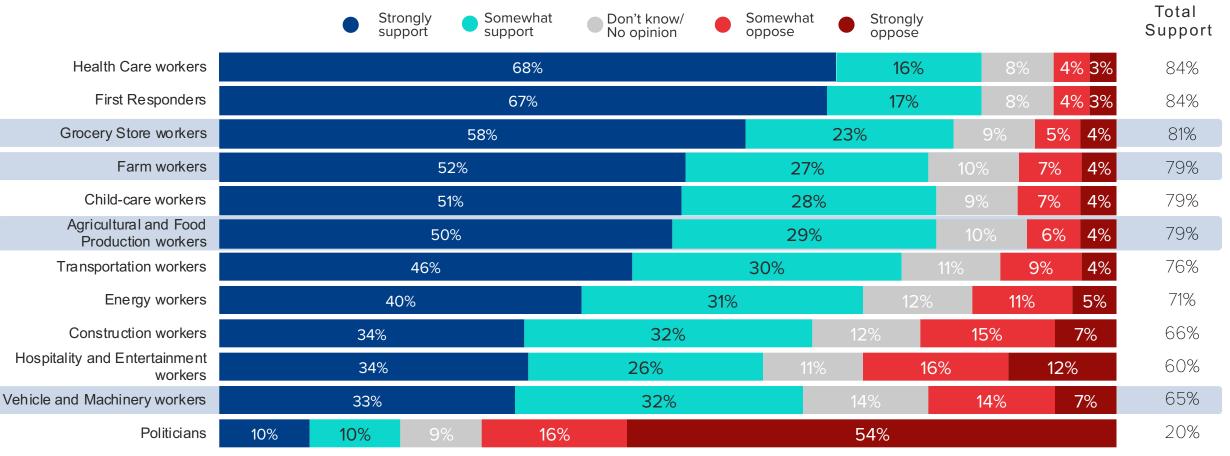


MORNING CONSULT

TAX RELIEF

Two-thirds or more of voters support providing tax relief to grocery store workers, farm workers, agricultural and food production workers, and vehicle and machinery workers.

Do you support or oppose offering temporary tax relief to the following workers during the coronavirus (COVID-19) pandemic?



Total Support= Strongly + Somewhat support

TAX RELIEF

Three-quarters or more of voters, across key demographics, support providing temporary tax relief to agricultural and food production workers- this relief has bipartisan support.

Do you support or oppose offering temporary tax relief to the following workers during the coronavirus (COVID-19) pandemic? Agricultural and Food Production Workers

	Strongly support Somewhat Don't know/ No opinion	Somewhat St oppose op	rongly ppose	Total Support
Registered Voters	50%	29%	10% 6%	4% 79%
Male	47%	31%	9% 8%	5% 78%
Female	54%	27%	11% 59	<mark>% 3%</mark> 81%
GenZers: 1997-2012	44%	29%	20% 3%	5% 73%
Millennials: 1981-1996	55%	25%	12% 6	<mark>% 2</mark> % 80%
GenXers: 1965-1980	51%	29%	9% 4%	7% 80%
Baby Boomers: 1946-1964	49%	30%	8% 9%	4% 79%
Democrat	55%	29%	7% 6%	<mark>3%</mark> 84%
Independent	49%	27%	14% 6%	4% 76%
Republican	46%	30%	11% 7%	6% 76%
Urban	52%	27%	11% 6%	5% 79%
Suburban	50%	29 %	9% 6%	5% 79%
Rural	50%	30%	11% 79	<mark>% 2</mark> % 80%
Northeast	50%	28%	10% 7%	4% 78%
Midwest	47%	29%	11% 7%	6% 76%
South	52%	29%	11% 6%	4% 81%
West	52%	28%	9% 7%	4% 80%
		Total Support	= Stronaly + Somewhat s	upport

TAX RELIEF

There is bipartisan support in offering temporary tax relief to farm workers, more than three quarters of Democratic, independent, and Republican voters support offering this relief.

Do you support or oppose offering temporary tax relief to the following workers during the coronavirus (COVID-19) pandemic? Farm workers

Registered Voters 52% 27% 10% 7% 4% 79% Male 48% 30% 8% 9% 5% 78% Female 56% 24% 11% 6% 3% 80% GenZers: 1997-2012 51% 20% 11% 7% 4% 71% Millennials: 1981-1996 54% 20% 11% 7% 3% 80% GenXers: 1965-1980 54% 26% 9% 5% 6% 80% Baby Boomers: 1946-1964 51% 28% 9% 3% 79% 7% 4% 79% Mencord 54% 28% 28% 9% 3% 79% 7% 4% 78% Mencord 53% 22% 28% 9% 7% <		Strongly support Somewhat Don't know/ No opinion	Somewhat oppose	Strongly oppose	Total Support
Female 56% 24% 11% 6% 3% 80% GenZers: 1997-2012 51% 20% 19% 7% 4% 71% Millennials: 1981-1996 54% 26% 11% 7% 3% 80% GenXers: 1965-1980 54% 26% 9% 5% 6% 80% Baby Boomers: 1946-1964 51% 28% 9% 3% 79% Democrat 54% 25% 12% 7% 3% 78% Mildependent 53% 28% 9% 3% 78% 78% Muber 53% 28% 9% 7% 4% 81% 78% Muber 53% 28% 9% 7% 4% 78% 78% Muber 53% 28% 9% 7% 4% 78% 78% Muber 53% 28% 9% 7% 4% 78% 78% Muber 53% 28% 9% 7% 4% 79% 78% Muber 51% 28% 9% 7% 4% 79% 78% Mubr 52%	Registered Voters	52%	27%	10% 7% 4%	79%
GenZers: 1997-2012 51% 20% 1% 7% 4% 7% 4% 7% 4% 7% 4% 7% 4% 7% 4% 7% 4% 80% Millennials: 1981-1996 54% 26% 11% 7% 3% 80% GenXers: 1965-1980 54% 26% 9% 5% 6% 80% Baby Boomers: 1946-1964 51% 28% 8% 9% 3% 7% Democrat 54% 29% 7% 7% 4% 83% Indep endent 53% 62% 12% 7% 3% 7% GenXers: 1965-1980 50% 62% 12% 7% 3% 7% Democrat 54% 29% 7% 7% 4% 83% 7% Indep endent 53% 22% 27% 10% 8% 5% 7% Urban 51% 54% 28% 9% 7% 4% 7% Suburban 51% 24% 28% 9% 7% 7% 7% <th>Male</th> <th>48%</th> <th>30%</th> <th>8% 9% 5%</th> <th>78%</th>	Male	48%	30%	8% 9% 5%	78%
Millennials: 1981-1996 54% 26% 11% 7% 3% 80% GenXers: 1965-1980 54% 26% 9% 5% 6% 80% Baby Boomers: 1946-1964 51% 28% 9% 5% 6% 80% Democrat 54% 28% 8% 9% 3% 79% Democrat 54% 29% 7% 7% 4% 83% Independent 53% 25% 12% 7% 7% 7% Republican 50% 27% 10% 8% 5% 7% Urban 53% 28% 9% 7% 4% 81% Suburban 51% 28% 9% 7% 4% 79% Midwest 52% 24% 11% 8% 3% 78% Midwest 51% 26% 10% 9% 4% 79% Midwest 51% 26% 10% 9% 4% 7% South 53% 51% 26% 10% 9% 4%	Female	56%	24%	11% 6% 3%	80%
GenXers: 1965-1980 54% 26% 9% 5% 6% 80% Baby Boomers: 1946-1964 51% 28% 8% 9% 3% 79% Democrat 54% 29% 7% 7% 4% 83% Independent 53% 50% 25% 12% 7% 3% 78% Republican 50% 50% 27% 10% 8% 5% 77% Urban 53% 28% 9% 7% 4% 81% Suburban 51% 28% 9% 7% 4% 81% Mortheast 54% 28% 9% 7% 4% 7% South 51% 28% 9% 7% 4% 7% Midwest 51% 28% 9% 7% 4% 7% Midwest 52% 27% 24% 11% 8% 3% 7% Midwest 51% 51% 26% 10% 9% 4% 7% South 53% 53% 28%	GenZers: 1997-2012	51%	20%	19% 7% 4%	71%
Baby Boomers: 1946-1964 51% 28% 8% 9% 3% 79% Democrat 54% 29% 7% 7% 4% 83% Independent 53% 25% 12% 7% 3% 78% Republican 50% 27% 10% 8% 5% 77% Urban 53% 22% 9% 3% 78% Suburban 50% 27% 10% 8% 5% 77% Wrant 51% 28% 9% 7% 4% 81% Suburban 51% 28% 9% 7% 4% 79% Rural 54% 24% 11% 8% 3% 78% Northeast 52% 27% 24% 11% 8% 3% 78% Midwest 51% 26% 10% 9% 4% 77% South 53% 53% 28% 10% 9% 4% 77% South 53% 53% 28% 10% 9% 4% <td< th=""><th>Millennials: 1981-1996</th><th>54%</th><th>26%</th><th>11% 7% 3%</th><th>80%</th></td<>	Millennials: 1981-1996	54%	26%	11% 7% 3%	80%
Democrat 54% 29% 7% 7% 4% 83% Independent 53% 25% 12% 7% 3% 78% Republican 50% 27% 10% 8% 5% 77% Urban 53% 28% 9% 7% 4% 81% Suburban 51% 28% 9% 7% 4% 79% Rural 54% 24% 11% 8% 3% 78% Northeast 52% 27% 9% 8% 4% 79% Midwest 51% 26% 10% 9% 7% 4% 7% South 53% 23% 26% 10% 9% 4% 7%	GenXers: 1965-1980	54%	26%	9% 5% 6%	80%
Independent 53% 25% 12% 7% 3% 78% Republican 50% 27% 10% 8% 5% 77% Urban 53% 28% 9% 7% 4% 81% Suburban 51% 28% 9% 7% 4% 79% Rural 6 54% 24% 11% 8% 3% 78% Northeast 52% 22% 9% 7% 4% 79% Midwest 51% 22% 10% 9% 4% 79% South 51% 26% 10% 9% 4% 79% 8 6 51% 26% 10% 9% 4% 7% South 53% 53% 28% 1% 5% 81%	Baby Boomers: 1946-1964	51%	28%	8% 9% 3%	79%
Republican 50% 27% 10% 8% 5% 77% Urban 53% 28% 9% 7% 4% 81% Suburban 51% 28% 9% 7% 4% 79% Rural 54% 24% 11% 8% 3% 78% Northeast 52% 27% 26% 9% 4% 79% Midwest 51% 22% 9% 4% 79% South 53% 53% 28% 11% 5% 3%	Democrat	54%	29%	7% 7% 4%	83%
Urban 53% 28% 9% 7% 4% 81% Suburban 51% 28% 9% 7% 4% 79% Rural 54% 24% 11% 8% 3% 78% Northeast 52% 27% 9% 8% 4% 79% Midwest 51% 26% 10% 9% 4% 77% South 53% 28% 11% 5% 81%	Independent	53%	25%	12% 7% 3%	78%
Suburban 51% 28% 9% 7% 4% 79% Rural 54% 24% 11% 8% 3% 78% Northeast 52% 27% 9% 8% 4% 79% Midwest 51% 26% 10% 9% 4% 79% South 53% 28% 11% 5% 3% 81%	Republican	50%	27%	10% 8% 5%	77%
Rural 54% 24% 11% 8% 3% 78% Northeast 52% 27% 9% 8% 4% 79% Midwest 51% 26% 10% 9% 4% 77% South 53% 28% 11% 5% 3% 81%	Urban	53%	28%	9% 7% 4%	81%
Northeast 52% 27% 9% 8% 4% 79% Midwest 51% 26% 10% 9% 4% 77% South 53% 28% 11% 5% 3% 81%	Suburban	51%	28%	9% 7% 4%	79%
Midwest 51% 26% 10% 9% 4% 77% South 53% 28% 11% 5% 3% 81%	Rural	54%	24%	11% 8% 3%	78%
South 53% 28% 11% 5% 3%	Northeast	52%	27%	9% 8% 4%	79%
	Midwest	51%	26%	10% 9% 4%	77%
West 53% 26% 8% 9% 4% 79%	South	53%	28%	11% 5% 3%	81%
Total Support-Strongly + Somewhat support	West	53%			

