

# ►► Sustainability and Food Retailing

A Practical Guide to Incorporating Sustainability and Supporting  
the Community During COVID-19 and Beyond



# Table of Contents

<b>Introduction</b>	3-4
<b>Consumer Appetite for Sustainability</b>	5-6
<b>Sidebar: COVID Context</b>	7-10
<b>Food Retailers' Role in the Community</b>	11-12
<b>Food Retailers' Role in the Environment</b>	13-14
<b>Environmentally Sustainable Changes Retailers Can Make</b>	15-20
<b>How to Connect with the Consumer of the Future</b>	21-22
<b>Take the Findings Into Action: Sustainability Toolkit</b>	23
<b>Appendix: Subgroup Differences</b>	24-29
<b>About the Authors</b>	30

---



# Introduction

Given the wide range of challenges—competitive, technological or consumer driven—facing the supermarket industry, it may be surprising that the members of the Coca-Cola Retailing Research Council of North America selected sustainability as a study topic.

However, the council members see this as a critical issue for business going forward thanks to ever-increasing consumer awareness of the importance of environmental issues and the simple reality that the majority of product and packaging waste collected by consumers each week comes from their local supermarket.

With that in mind, the council felt the time is right for supermarkets to actively examine the opportunities and challenges facing the industry, individual stores, and even specific products to best align with growing consumer feelings.

Through this study, conducted in partnership with Murphy Research, the council found a number of important points:

- **Despite the many areas of disagreement and divergent opinions among the American population, feelings on sustainability issues are almost universal despite differences in age, education, income status, and even political leanings. In other words, all shoppers share concerns about sustainability and agree on the need for the supermarket industry to address this topic in a variety of ways.**
- **The population segment most focused on sustainability is Generation Z, today’s young adults who form a large cohort soon to be among the supermarket’s most important shoppers.**
- **The Covid-19 pandemic reinforced for shoppers the importance and centrality of food retailers to their lives, their families and their communities as a source of incredibly important products. It also reinforced the importance of the industry taking action on issues of community importance including sustainability. In addition, shoppers specifically hope their local supermarket can help them practice greater sustainability.**
- **There is some evidence that strong environmentally friendly practices could become points of competitive advantage for supermarkets, especially as environmental concerns grow.**

## Note to Reader

When we first started this project in early 2020, no one had any idea what the year had in store for us. This year’s research topic of sustainability was chosen well before the global pandemic occurred. But by the Spring of 2020, we knew that life would never be the same. It didn’t feel right to focus solely on sustainability. Unable to ignore the state of the world, we decided to incorporate additional areas on diversity, community, and the impact of COVID on food retailers.

We want to acknowledge up front that food retailers have been put through a lot this year. There are so many areas that we are still struggling with including but not limited to diversity, violence in stores, and the health of our workers. You are tired. We are tired. We hear that. We feel that.

We’re also incredibly proud of the work that food retailers have done over the past year. The rest of the country is too. This work shows that appreciation for food retail workers swelled during this time as shoppers realized for the first time that we are also essential workers.

While it might have taken a backseat to these issues momentarily, we still strongly believe that sustainability is important and that importance will only continue to grow with time. We moved forward with this research this year because we believe it’s in our best interest to stay ahead of the curve on these issues as much as possible to maintain a competitive edge long-term.

Throughout the pandemic, sustainability and climate change remained at the forefront of Americans’ concerns.

At the same time, the Covid pandemic accelerated and illuminated a crisis of public confidence in both government and business that has been brewing for some time. Consumers show a clear need to see corporate leadership on social and environmental issues, and yet few actually trust business leaders to do what is right.

There is an opportunity to be a leader in this new business environment. Neglecting sustainability means leaving money on the table.

This will be even more important for building loyalty with the consumer of the future. Gen Z is more focused on climate change than any other generation in history. Every generation has their cause. Gen Z’s is the environment. We can start gaining their loyalty now by focusing more on the environment.

We hope that this report will help provide a better understanding of this issue and what your shoppers are expecting you to do in response. In addition, please try the tool we created (at the end of the report) to help you build a sustainability response that fits with your company’s capabilities.

Click here  
to learn more





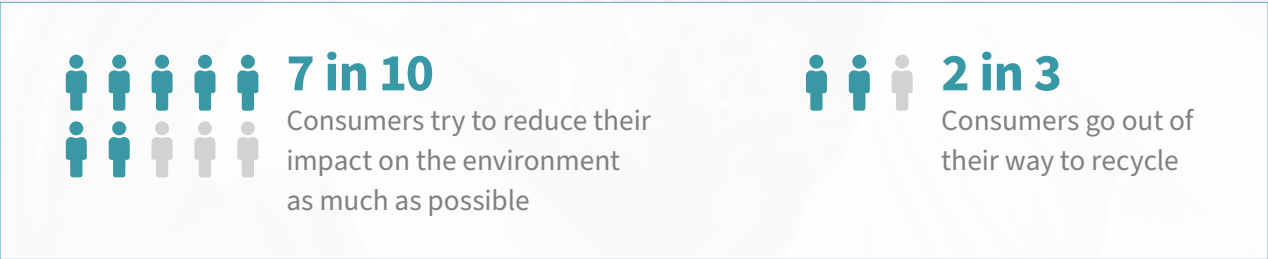
# We're more alike than we are different

As demonstrated in the 2020 elections, the United States can feel intensely polarized.

We might feel (and might be) as polarized as ever, but this research showed us that there are many areas — sustainability included — where we agree more than we disagree.

We're much more similar than we are different.

Sustainability is an area in which Americans are united. Sustainability is important.

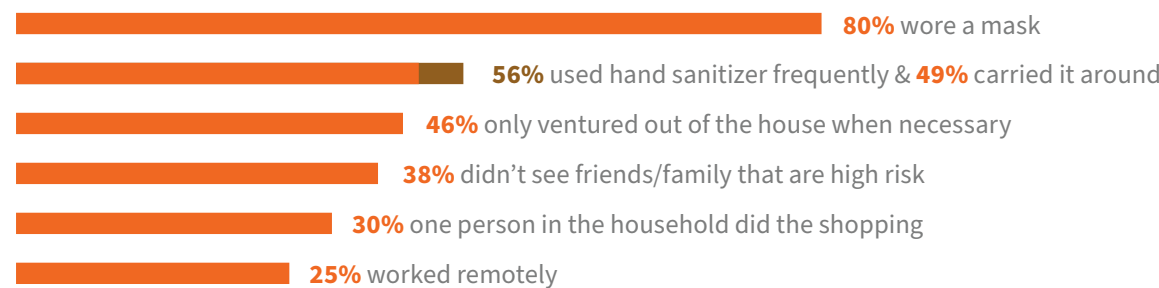




# Food retailers' role in the community in the time of COVID

## 2020 was a year unlike any other.

The COVID-19 pandemic fundamentally altered our way of life. Spending extended periods of time at home shifted priorities and we changed how we went about our day-to-day activities. Consumers have steadily engaged in the following activities to try to stay healthy and safe over the course of the pandemic.

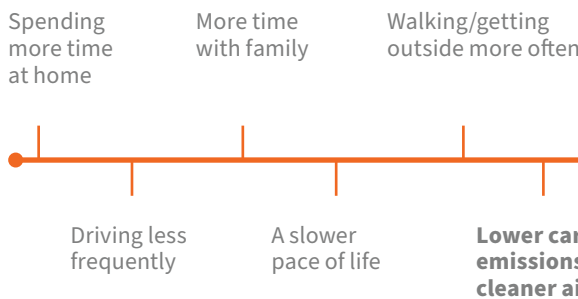


## 2020 brought out a mix of emotions from consumers around the pandemic.

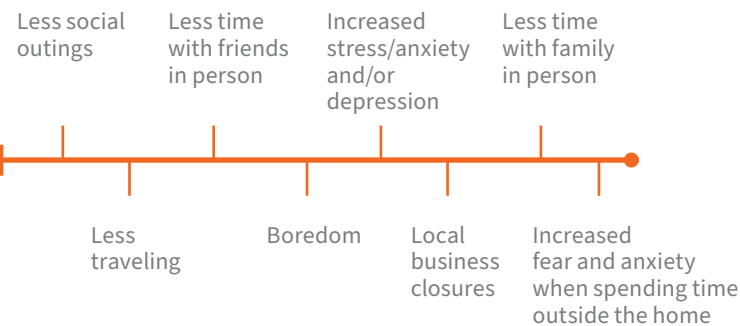
Consumers have tried to find silver linings with spending more time at home.

But it's also been a struggle with increased isolation and boredom leading to a decline in mental health.

### Top positive changes



### Top negative changes



#### Marsha, 73, Indiana

By not being on the road so much, that's also helping with the atmosphere.

#### Amina, 46, Indiana

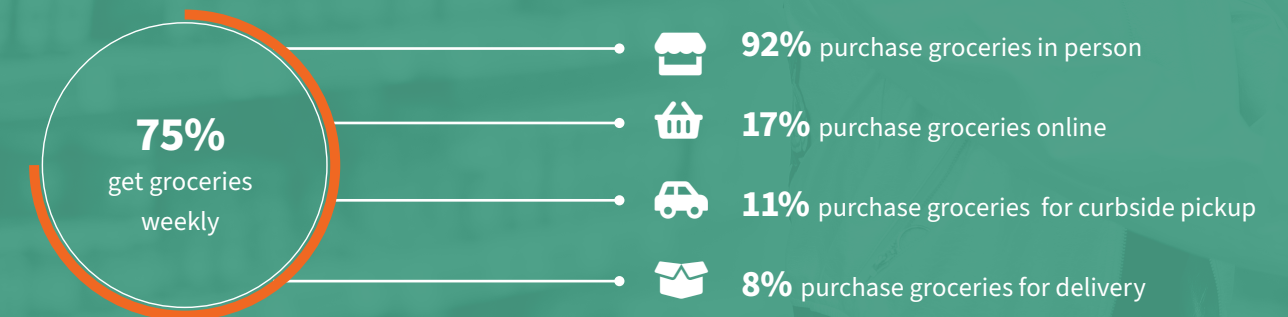
The environment has definitely gotten cleaner.

#### Tracy, 24, California

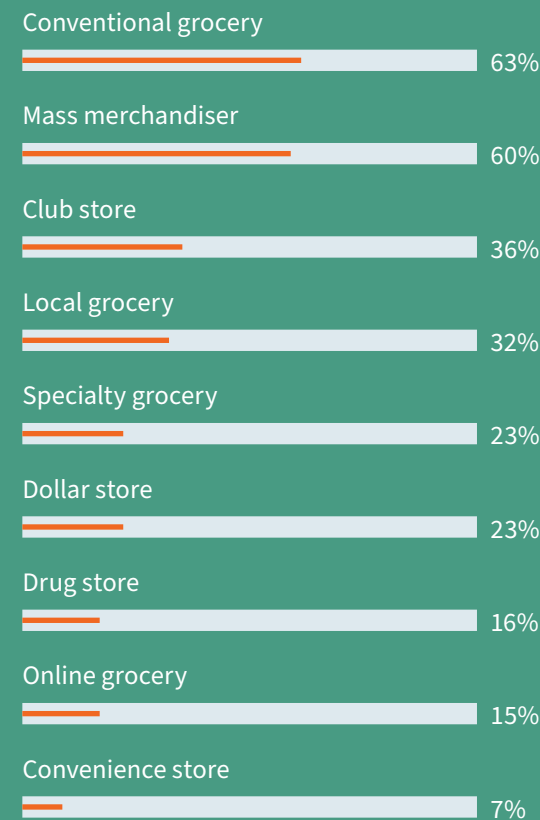
One of the positives is that you really saw the reduction in pollution and everything. You saw how things could be.

## One constant throughout the pandemic was grocery shopping.

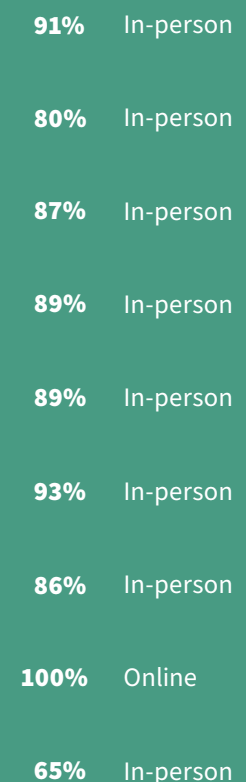
Though food retailers extended curbside and delivery options, most people continued to shop in-store on a regular basis.



### Channels consumers regularly shop for groceries...



### Primary Method...



#### Daniel

30, Maryland

Now it's picked up with masks, social distancing, and hand sanitizer. We feel safe going out. It's back to our normal. What we're doing now is the same that it was before the virus.

#### Marion

64, Rhode Island

When it started, I did a huge grocery run that lasted almost a month. Being a senior, I can go during senior hours. I can go in weekly now.



## COVID Context

Food shopping is seen as a relatively safe activity during the pandemic.



Consumers believe their food retailer adapted well and they continue to be highly satisfied with their primary retailer.

**81%** are extremely or very satisfied with their retailer

**63%** believe their food retailer adapted well

**Georgia, 32, New Jersey**

In the beginning of the pandemic I went a whole lot less, because of the lines and there were so many people. But now I'm back to my normal once per week.

But, the pandemic has made shopping more stressful

**73%** of shoppers spend as little time as possible in-store

**70%** say shopping is more stressful now compared to before

**68%** worry about the health of employees

**Michael, 63, Massachusetts**

I am one of those people who should be a poster for extreme risk. Going to the market wasn't on my top 10 things to do before, but it didn't bother me. Now if I see people without a mask it angers me.

**Karen, 64, South Carolina**

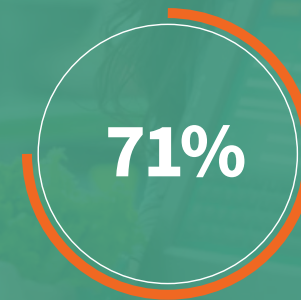
I'm less likely to go spontaneously depending on what I'm fixing for dinner. I tend to go just once a week. I get in, get what I need, and get out. I mostly can't stand the mask stuff, so I make it a quick trip.

Convenience and value still drive retailer selection, but safety and cleanliness became increasingly important during the pandemic.

The pandemic put the supermarket back in the center of the community as appreciation for employees and local retailers grew.



are much more appreciative of food retail employees



are much more appreciative of their local store

## In their own words...

**Carolina, 33, New York**

I speak more highly of the employees because they're risking their lives to work and make sure everyone has everything they need.

**Steve, 50, Massachusetts**

The cashiers are rock stars. They're seeing everyone who comes in the store.

**Tracy, 24, California**

I think they are one of the unsung heroes in this pandemic, they are essential workers that are out there every day exposing themselves and working their best. Before it was general appreciation, we're all working in society, we're all doing our jobs. And, now, everyone else is at home and they're out there every day making sure everyone gets the groceries they need. Definitely a greater appreciation.

**Amina, 46, Indiana**

I was looking at it as someone being there to serve me before... but now being essential workers... I have more respect for them, and I understand that I don't know what they've gone through.

**Douglas, 70, Minnesota**

I appreciate them more for working through the pandemic.

**Lior, 25, Virginia**

I'm afraid to take the bus and they're out there interacting with people every day. Bravo! Props to them.

**Lindsey, 31, Kentucky**

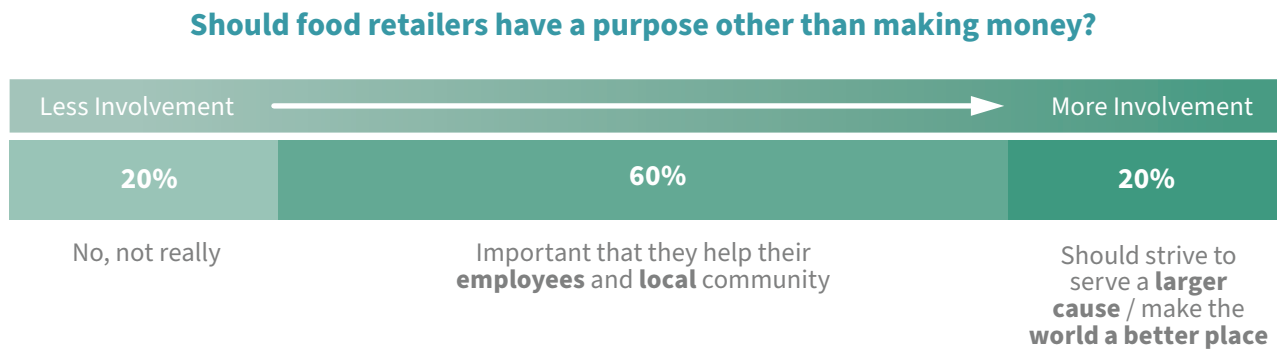
Honestly, I've thought way more about it... Just the fact that they're having to work through this pandemic; they're frontline employees. I'm just very grateful for them. My eyes have definitely been opened.



# Food retailers’ role in the community in general



Food retailers have always been cornerstones of the community - the pandemic only heightened that sentiment. The majority of consumers want to see food retailers playing a role in their community, especially their local community.



60% of consumers say it is important for food retailers to try to help their employees and local community in addition to making a profit. This sentiment is largely the same across regions and neighborhood types, generations, gender, income, ethnicity, and political party.

## In their own words...

**Jennifer 40, Michigan**

I think if they can do things to help the community - outreach for people who are homeless or people that are hungry. If they can team up and do something like that, I think they should.

**Tracy 24, California**

I like to see grocery stores getting involved in the community and helping out.

**Michael 63, Massachusetts**

It's nice when you see them sponsoring the little league team and giving a donation to local charity.

Consumers already differentiate food retailers based on their local impact. Alongside traditional concerns such as good value, well-stocked, and convenience, consumers also rate sustainability and community attributes that specifically relate to food and employees within their top tier of importance.

Key Supermarket Attributes						
Most Important			Least Important			
Good value for the money	Donate leftover food	Good selection of Made in USA	Advocates for equality	Curbside pickup	Info on sourcing	Digital receipts
Pays a livable wage	Convenient	Donates to local food-related causes	Supports humane animal practices	Parking is available	Offers prepared food	Donates to religious orgs
Clean/regularly sanitized	Provide disinfectant wipes	Quick checkout process	Wide variety of local products	Limits/decreases excess packaging	Biodegradable bags for produce	Sponsors local child sports teams
Always has what I need in stock	Accommodates elderly/at-risk shoppers	Easy to navigate	Incentivizes cosumers to reduce waste	Combats child labor/slavery	Close to mass transit stop	Compost system
Provide healthcare benefits	High-quality store brands	Donates to local non-food related causes	Knowledgeable employees	Offers delivery	Supports coservation	Compostable utensils
	High-quality customer service	Employs workers with disabilities	Diverse workforce	Supports sustainable farming	Supports clean water	EV charging stations
	Offers relevant promotions		Wide variety of organic/natural	Energy efficient	Upcycled goods	Donates to political candidates
				Grass-fed products	Donates nationally	
				Bulk food	Donates bins	
				Security guards	Mobile payment	



# Food retailers’ role in the environment

Sustainability in a food retail setting is personal and emotional: Consumers are less concerned about the environmental impact of the retailer itself and are more concerned with their own environmental impact when they’re in the store because the supermarket is where they accumulate most of the products that lead to their personal waste.

Consumers do the best that they feel they can. Actions that are perceived to have a negative impact on the environment evoke strong feelings of guilt. Actions that are perceived to have a positive impact on the environment provide an emotional lift.

Food retailers are central to alleviating guilt about not doing enough for the environment because it’s so central to the accumulation of personal waste.

There’s an opportunity for food retailers to educate consumers on how to have the most positive impact when shopping. Consumers are a captive audience and they are willing to learn!

## In their own words...

**Diana 58, California**

Purchasing any groceries, whatever I get I try to look at the packaging and pay attention to what it’s made of. I want to have something that’s going to be recyclable or will break down like glass. I’m conscious of it but I don’t always do it 100%. I still use straws sometimes.

**Lindsey 31, Kentucky**

I definitely think about it, but I’m not very good about it. We try to recycle as much as possible. Using plastic bags, it gets to me, but at the same time I haven’t done anything about it.

**Tracy 24, California**

Ideologically, it’s very important to me. But in practice I’m still guilty in that I tend to let price push what I purchase more so than product sustainability.

**Marsha 73, Indiana**

[I think about sustainability] more so than I did, but I’m still not 100% there. I still buy stuff in plastic.

**Ronn 72, Pennsylvania**

It’s not something that is totally in my head ever. It’s not that I’m not a proponent of what is going on in that movement. It’s like losing weight. I don’t have it in my head to lose it. I don’t have the environment in my head when I’m shopping.

**Wade 46, New York**

This is way bigger than my little 5 minutes of extra time on the subway or walking. We’re talking about an impact years down the road, and I want to help take care of that.

Consumers prioritize what they’ve been taught will help limit environmental impact, which mainly leads to focusing on recycling and avoiding plastic bags. Consumers are also interested in limiting their food waste.

### Personal Goals & Priorities

Most Important <span>→</span> Least Important						
Vote	Recycle/donate old clothes	Walk/bike when possible	Use reusable items when out	Support environmental orgs	Shop bulk foods	Use public transportation
Recycle	Advocate for a livable wage	Advocate for equality	Supports local non-food related non-profits	Support national/global non-profits	Support clean water orgs	Decline paper receipts
Limit food waste	Use reusable bags	Attend/support religious org	Limit/decrease purchase of single use plastics	Support sustainable agriculture/farming	Use alternative energy at home	Purchase based on origins
Purchase Made in USA	Advocate for healthcare benefits	Grow own food/garden	Eat organic/natural foods	Purchase sustainable goods	Drive energy efficient vehicle	Actively participate in local politics
	Purchase food from local farmers	Support humane animal practices	Actively work on reducing carbon footprint	Support conservation orgs	Compost	Use rainwater buckets
	Support local non-profits working to end food insecurity		Advocate for diversity & inclusion	Actively work toward zero waste	Decline disposable items with takeout	Actively participate in national politics
				Eat vegetarian/vegan		Donate to national candidates
				Purchase grass-fed products		Donate to local candidates

## Will Making Changes Impact the Bottom Line?

Yes, it will impact the bottom line. **Consumers are willing to put their money where their mouth is. They are willing to pay an average of 4% more at a food retailer that implements initiatives to support their community and the environment.** It could also become a competitive advantage, by demonstrating to shoppers that your store is aligned with their concerns and values. That could lead to greater store or product loyalty!

Even if it’s not universally expected, helping the community and environment is universally seen as a good thing for a company to do.

Consumers are more willing to travel out of their way to go to a store that has a positive impact on the community than pay more money.

➡

Consumers are willing to travel 6.5 - 10.9 minutes out of their way on average for a store they believe has a stronger impact.





# Changes retailers can make

## Start local and focus on food.

Food-related causes are seen as the best fit and most important initiatives for food retailers to embrace. Consumers across the country from all different backgrounds prioritize the following initiatives above the rest:



**Donate food that is close to expiration to food banks**  
— 380\* —



**Partner with local food banks or food-related non-profits**  
— 264 —

**If you don’t have similar programs,** think about starting them, as they’re most important to consumers. This became especially important during the pandemic, when consumers were acutely aware of food insecurity and the ripple effects school closures were having on food insecure children.

**If you’re already working with local food banks or non-profits,** be sure to let your consumers know! Most consumers are not aware of the good work their local stores are doing to make sure their neighbors don’t go hungry, but it’s important to them.



*\*How to read scores: Key initiatives were determined using a tournament question. In analysis, initiatives were assigned a point value depending on whether they were selected in the tournament across rounds. Scores were then averaged across all possible initiatives and indexed so that 100 is the average index score. Index scores above 100 are above average, and scores under 100 are below average. The data shown here is among total respondents, though analysis was conducted to ensure that key initiatives were prioritized across subgroups.*

## In their own words...



### Tim, 53, Texas

Grocery stores should buy less or take the excess and give it to homeless in the community.

### Ari, 19, Colorado

You have all this food that would make a gourmet meal to a homeless person. I remember throwing away trash bag after trash bag of produce, meat, dairy, when that could be given to a homeless person.

### Brian, 59, Nebraska

Food banks and city missions are easier to track locally and you feel like your money is going right to the cause, and they stay apolitical. There’s not a big agenda behind it other than providing food and clothes for those who need it.

### Jennifer, 40, Michigan

Maybe deliver groceries for free to people who were struggling to get food during the pandemic.

### Stephen, 72, Nebraska

If they want to donate food for their tax write off, God bless them. I know it’s for their tax write off. But it does make me happy that they’re not letting the food spoil. There’s too many people starving in the world.

### Lindsey, 31, Kentucky

Helping to provide food for kids that don’t have the means to now that they aren’t going to school [during the pandemic].

### Lior, 25, Virginia

Food waste is also a huge thing, so doing their best to solve that, like donating food to a homeless shelter. Donate to food waste. That makes more sense to me than donating money to the boys and girls club.





# Help consumers help the environment

## Consumers care about the environment.

They focus on the steps they’ve been taught to take such as recycling and limiting the use of plastic bags. The following initiatives are also very popular among consumers and should be prioritized.



Have recycling bins on-site

— 244\* —



Earn points/prizes for amount of waste saved through purchases and recycling

— 129 —



Provide biodegradable bags for produce

— 128 —

While most of these ideas are likely not feasible, consumers in communities that don’t have recycling collection come to their home would love to see their local store act as a recycling collection site. Anything that can be done to make recycling easier for local community members goes a long way.

## The desire to lessen one’s impact on the environment is universal.



*\*Note: Key initiative index scores shown above. Index scores above 100 are above average, and scores under 100 are below average. For a full explanation of how scores were calculated, see note on page 15.*

## In their own words...

### Younger generations prioritize it...

**Tracy, 24, California**

We have recycling set up here, we do bottles, papers, etc. [At school] one of the one big complaints... was that there is a lot of paper usage... that’s not needed. I helped to push an iPad initiative... to help reduce the amount of paper waste.

**Caroline, 33, New York**

I think it’s very important, I want to make sure the environment is safe and clean for the future generation. I try to recycle as much as I can. Any of our old electronics we try to dispose of in the proper facilities. We always try and upcycle. Empty containers we use for the garden or arts and crafts.

**Georgia, 32, New Jersey**

It’s very important. Because we live here! The decisions we make now impact... what will happen in the next 10, 50, 100 years. My little contribution is I try to recycle. I try to make sure it’s something I do consistently... Right now I’ll stick with that because I don’t want to put too much pressure on myself.

### ...And so do the older generations

**Tara, 55, New Mexico**

I try to do things like have solar panels on my house. If I’m able to walk/bike over driving, I’ll do that. I try not to waste water, I recycle, things like that.

**Brian, 59, Nebraska**

We recycle in every way. We make a conscious effort to take care of the wildlife in our area. We carpool when we can, it’s kind of second nature. It’s not huge, but it’s something. We don’t go back in the trash and dig out things that might’ve been recyclable and I wish we could do better at that, but it’s not realistic. I know recycling truly has been proven to help the environment. Recycling makes me feel good, makes me a little bit more open minded.

**Bonnie, 62, Washington**

I always recycle, I’m cutting down on our use of paper, I buy items in glass instead of plastic... I’m always trying to limit my impact. I buy local and organic, and I buy energy saving light bulbs.

# Plastic: What Consumers Don't Understand

**Plastic bags are one of the biggest sources of tension and guilt in stores.** Consumers have been taught for decades that plastic bags are bad, paper bags are better, and reusable bags are the best option for the environment. Because of this, they feel a strong sense of guilt and remorse when they use plastic in-store. Consumers strongly prefer that retailers take care of this problem for them. Consumers would prefer that retailers do away with plastic bags - either by offering only paper bags or doing away with all bags completely - rather than be charged 10 cents per bag.

**Plastic technology has come a long way in the past decade.** Plastic bags are not as bad for the environment as they used to be. But, consumers have not been educated on new plastic developments. If you are not planning on moving away from plastic bags, focus on educating consumers about the strides that have been made to make plastic more environmentally friendly. This will help alleviate the guilt consumers feel in store.



## In their own words...

**Tara, 55, New Mexico**  
We have to use plastic bags at the grocery store at the moment, which is frustrating because I really try to limit my impact on the environment. I give my plastic bags to my husband to use at the church food pantry, so they are getting reused.

**Marion, 64, Rhode Island**  
I haven't really thought about it other than bringing reusable bags. I do that rather than use more plastic and paper...That's where there could be more education from everybody to get people thinking about it more.

**Laura, 31, Oklahoma**  
I've been to natural grocers and they require you to bring a tote or they give you a cardboard box. I definitely think all grocery stores, instead of giving you plastic bags, could require the same thing - bring a tote or put it in a cardboard box.

**Alexandra, 36, New Hampshire**  
Now with delivery there's a lot of plastic bags, which is really a big problem for the environment. If I order things from Amazon pantry or their grocery store, there's a lot of paper boxes.

**Lindsey, 31, Kentucky**  
Plastic bags - that's a huge one. A lot of areas it's been better. Using plastic bags, it gets to me, but at the same time I haven't done anything about it.

**Marsha, 73, Indiana**  
Do away with plastic bags and go back to the paper bags. I do use them. But I think that would be less on the environment, to get rid of plastic bags.

**Jennifer, 40, Michigan**  
Environment would be nice, I know [my store] is eventually going to get rid of plastic bags and they talked about stopping paper receipts.

## Other popular initiatives that consumers would like to see retailers take on:



*\*Note: Key initiative index scores shown above. Index scores above 100 are above average, and scores under 100 are below average. For a full explanation of how scores were calculated, see note on page 15.*



## Gen Z's passion project is the environment

% Consider environmental sustainability at least **most of the time** when shopping:

Generation	Percentage
Gen Z	56%
Millennials	45%
Gen X	37%
Boomers	22%

0021

Gen Z shoppers find it important for food retailers to support causes related to conservation and humane animal practices more so than other generations. As an added benefit, other efforts that will attract Gen Z shoppers such as limiting packaging and providing biodegradable bags and compostable utensils will help food retailers attract Millennials and Gen X shoppers as well.

Gen Z	Millenials	Gen X	Boomers
Supports conservation	Variety of organic/natural	Provides healthcare benefits	
Supports humane animal practices	Bulk food section	Has security guards	
	Energy efficient alternative	Makes accommodations for elderly/at-risk shoppers	
Limit excess packaging			
Provides biodegradable produce bags		Good value	
Provides compostable utensils		Pays a livable wage	
	Grass-fed meat and dairy	Donates food to food banks	
	Easy to navigate		
	Good selection of products Made in the USA		
	Relevant promotions		

- Have a section or aisle dedicated to sustainable products \_\_\_\_\_ 155\*
- Sell carbon offsets \_\_\_\_\_ 140
- Add doors on the refrigerated sections to conserve energy \_\_\_\_\_ 118
- Launch a reduce, reuse, recycle education campaign \_\_\_\_\_ 113
- Offer recycling for masks \_\_\_\_\_ 102

*\*Note: Key initiative index scores shown above by Gen Z. Index scores above 100 are above average, and scores under 100 are below average. For a full explanation of how scores were calculated, see note on page 15.*

# Take the next step in your sustainability journey and see which initiatives you should prioritize based on your consumer base!

Are you looking to take the next step to make your retail locations more sustainable? Take this short quiz to find out the initiatives that will resonate most with your consumer base!

We’ve spent the past year talking to consumers to learn what they care about when it comes to sustainability and what they would like to see from retailers. We took all of the data we generated and created this simple tool to help you navigate sustainability and find initiatives that will resonate the most with your consumer base.



Click here for the **CCRRC Sustainability Toolkit: A Personalized Practical Guide to Incorporating Sustainability in Store**

## Appendix

### Consumer Expectations of Food Retailers:

### Generational Differences

01	<b>Gen Z</b>	<b>Top 5 most interested in:</b>	
		• Have a section/aisle dedicated to sustainable products	155*
		• Don't sell products that endanger wildlife	154
		• Donate food that is close to expiration to food banks	143
		• Offers shoppers points/prizes for amount of waste saved through purchases and recycling	142
		• Sell carbon footprint offsets	140
02	<b>Millennials</b>	<b>Top 5 most interested in:</b>	
		• Donate food that is close to expiration to food banks	323
		• Partner with local food banks or food-related non-profits	191
		• Offers shoppers points/prizes for amount of waste saved through purchases and recycling	166
		• Have a recycling bin on-site	138
		• Retailer acts as a recycling collection site	122
03	<b>Gen X</b>	<b>Top 5 most interested in:</b>	
		• Donate food that is close to expiration to food banks	345
		• Partner with local food banks or food-related non-profits	261
		• Replace all plastic bags with paper bags	159
		• Have a recycling bin on-site	151
		• Require reusable bags; no longer offer paper or plastic bags in-store	136
04	<b>Boomers</b>	<b>Top 5 most interested in:</b>	
		• Donate food that is close to expiration to food banks	479
		• Partner with local food banks or food-related non-profits	329
		• Have a recycling bin on-site	173
		• Label products that are locally grown/made	168
		• Replace all plastic bags with paper bags	147

Boomers      Gen X      Millennials      Gen Z



*\*Note: Key initiative index scores shown above by generation. Index scores above 100 are above average, and scores under 100 are below average. For a full explanation of how scores were calculated, see note on page 15.*



Consumer Expectations  
of Food Retailers:

Subregion  
Differences

- 09 Pacific
- Top 5 most interested in
- Donate food that is close to expiration to food banks (331\*)
  - Partner with local food banks or food-related non-profits (269)
  - Label products that are locally grown/made (151)
  - Don't sell products that endanger wildlife (147)
  - Have a recycling bin on-site (146)

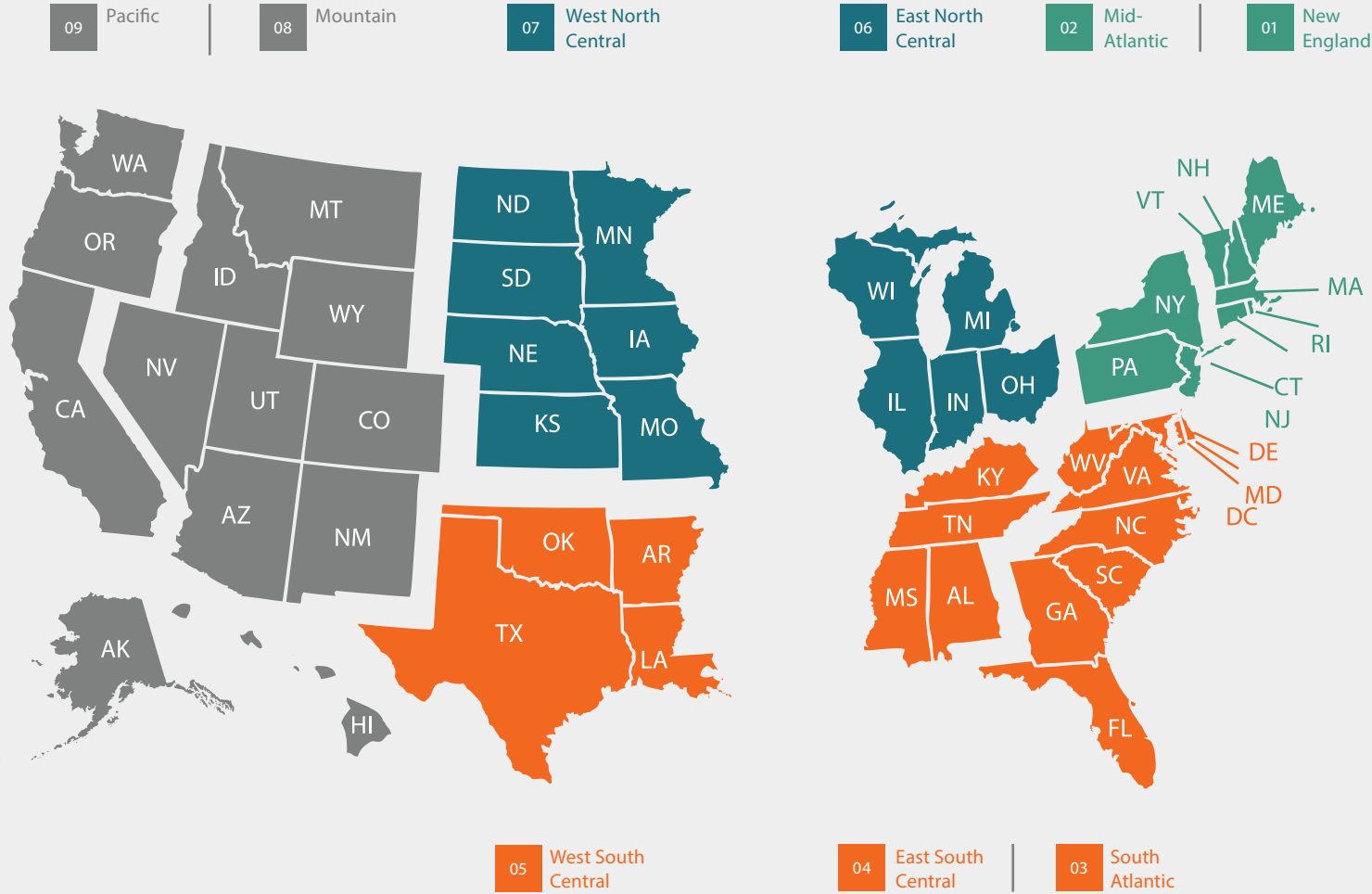
- 08 Mountain
- Top 5 most interested in
- Partner with local food banks or food-related non-profits (334)
  - Donate food that is close to expiration to food banks (329)
  - Have a recycling bin on-site (189)
  - Provide biodegradable bags for produce (146)
  - Don't sell products that endanger wildlife (130)

- 07 West North Central
- Top 5 most interested in
- Donate food that is close to expiration to food banks (430)
  - Partner with local food banks or food-related non-profits (230)
  - Require reusable bags; no longer offer paper or plastic bags in-store (166)
  - Provide biodegradable bags for produce (141)
  - Have a recycling bin on-site (140)

- 05 West South Central
- Top 5 most interested in
- Donate food that is close to expiration to food banks (378)
  - Partner with local food banks or food-related non-profits (274)
  - Provide biodegradable bags for produce (176)
  - Have a recycling bin on-site (172)
  - Label products that are locally grown/made (153)

- 04 East South Central
- Top 5 most interested in
- Donate food that is close to expiration to food banks (470)
  - Partner with local food banks or food-related non-profits (336)
  - Offers shoppers points/prizes for amount of waste saved through purchases and recycling (176)
  - Label products that are locally grown/made (175)
  - Provide biodegradable bags for produce (131)

- 03 South Atlantic
- Top 5 most interested in
- Donate food that is close to expiration to food banks (387)
  - Partner with local food banks or food-related non-profits (216)
  - Have a recycling bin on-site (175)
  - Replace all plastic bags with paper bags (160)
  - Retailer acts as a recycling collection site (148)



- 06 East North Central
- Top 5 most interested in
- Donate food that is close to expiration to food banks (368)
  - Partner with local food banks or food-related non-profits (304)
  - Have a recycling bin on-site (172)
  - Offers shoppers points/prizes for amount of waste saved through purchases and recycling (145)
  - Provide biodegradable bags for produce (141)

- 02 Mid-Atlantic
- Top 5 most interested in
- Donate food that is close to expiration to food banks (412)
  - Partner with local food banks or food-related non-profits (202)
  - Replace all plastic bags with paper bags (182)
  - Require reusable bags; no longer offer paper or plastic bags in-store (168)
  - Sell food products in a wider variety of sizes to help limit food waste (160)

- 01 New England
- Top 5 most interested in
- Partner with local food banks or food-related non-profits (326)
  - Donate food that is close to expiration to food banks (308)
  - Label products that are locally grown/made (158)
  - Replace all plastic bags with paper bags (150)
  - Sell food products in a wider variety of sizes to help limit food waste (141)

\*Note: Key initiative index scores shown above by subregion across pages 25-26. Index scores above 100 are above average, and scores under 100 are below average. For a full explanation of how scores were calculated, see note on page 15.

How to read scores across pages 27-29: Top personal goals were determined using a tournament followed by a ranking question with 44 goals to choose from and rank. In analysis, goals were assigned a point value depending on whether they were selected in the tournament, and how highly they were ranked. Scores were then averaged across all possible goals and indexed so that 100 is the average index score. Index scores above 100 are above average, and scores under 100 are below average.

Top 10 Personal Goals by Generation

Gen Z	Millennials	Gen X	Boomers
Advocate for equality243	Recycle287	Vote374	Vote542
Advocate for a livable wage229	Vote246	Recycle313	Recycle352
Limit food waste209	Limit food waste226	Limit food waste268	Purchase Made in the USA287
Use reusable items when out191	Advocate for a livable wage175	Purchase Made in the USA255	Limit food waste251
Recycle170	Purchase Made in the USA163	Recycle/donate clothes170	Recycle/donate old clothes199
Supporting non-food related local non-profits169	Walk/bike when possible158	Advocate for a livable wage169	Attend/support a religious org.180
Recycle/donate clothes164	Eat organic/natural foods157	Purchase from local farmers155	Advocate for a livable wage169
Use reusable bags153	Advocate for healthcare benefits145	Support local food-related non-profits145	Advocate for healthcare benefits160
Support local food-related non-profits147	Recycle/donate clothes144	Use reusable bags142	Purchase from local farmers159
Advocate for reduced crime147	Use reusable items when out138	Advocate for healthcare benefits133	Use reusable bags147

Top 10 Personal Goals by Ethnicity

Caucasian	African-American	Hispanic	Asian
Vote419	Vote252	Recycle272	Limit food waste362
Recycle321	Limit food waste243	Limit food waste245	Recycle334
Purchase Made in the USA252	Recycle220	Vote234	Use reusable bags269
Limit food waste246	Advocate for a livable wage213	Purchase Made in USA190	Vote249
Recycle/donate clothes178	Advocate for equality211	Use reusable bags187	Recycle/donate old clothes180
Advocate for a livable wage175	Advocate for diversity/inclusion195	Recycle/donate old clothes180	Limit single-use plastics170
Purchase from local farmers151	Purchase Made in the USA175	Advocate for a livable wage174	Use reusable items when out164
Advocate for healthcare benefits149	Use reusable bags163	Advocate for healthcare benefits168	Eat organic/natural foods160
Use reusable bags141	Advocate for healthcare benefits163	Support humane animal practices & standards150	Walk/bike when possible149
Support local food-related non-profits136	Attend/support a religious org.146	Advocate for equality148	Grow your own food/garden132

Top 10 Personal Goals by Annual Household Income

Under \$50,000	\$50,000-\$99,000	\$100,000-\$199,000	\$200,000+
Vote317	Vote420	Vote467	Vote423
Recycle287	Recycle317	Recycle341	Recycle337
Limit food waste286	Limit food waste238	Purchase Made in the USA242	Limit food waste222
Purchase Made in the USA246	Purchase Made in the USA238	Limit food waste219	Walk/bike when possible180
Advocate for a livable wage179	Advocate for a livable wage177	Recycle/donate clothes182	Recycle/donate old clothes164
Recycle/donate clothes177	Advocate for healthcare benefits167	Advocate for a livable wage156	Use reusable bags162
Use reusable bags162	Recycle/donate old clothes165	Purchase from local farmers152	Purchase Made in the USA160
Support local food-related non-profits156	Use reusable bags150	Use reusable bags137	Advocate for a livable wage149
Purchase from local farmers153	Purchase from local farmers140	Walk/bike when possible132	Support orgs that focus on the environment & sustainability133
Advocate for healthcare benefits146	Attend/support a religious org.140	Advocate for healthcare benefits130	Attend/support a religious org.132

Top 10 Personal Goals by Political Affiliation

Republicans	Democrats
Vote394	Vote488
Purchase Made in USA299	Recycle359
Recycle246	Limit food waste310
Limit food waste207	Advocate for a livable wage252
Attend/support a religious organization195	Advocate for equality215
Recycle/donate clothes183	Advocate for healthcare benefits193
Purchase from local farmers154	Use reusable bags172
Grow own food/garden151	Recycle/donate clothes151
Support local food insecurity non-profits145	Purchase Made in USA136
Advocate for a livable wage143	Support local food insecurity non-profits131



# Top 10 Personal Goals by Subregion

New England	Mid Atlantic	South Atlantic
Vote342	Vote348	Vote451
Recycle340	Recycle302	Recycle309
Use reusable bags210	Limit food waste282	Purchase Made in USA283
Advocate for a livable wage197	Purchase Made in USA225	Limit food waste245
Purchase Made in USA192	Advocate for a livable wage198	Recycle/donate clothes180
Recycle/donate clothes182	Use a reusable bag184	Advocate for a livable wage177
Limit food waste181	Walk/bike when possible169	Purchase from local farmers153
Support humane animal practices168	Recycle/donate old clothes160	Support food insecurity non-profits152
Purchase from local farmers163	Advocate for healthcare benefits145	Advocate for healthcare benefits145
Actively work on reducing carbon footprint135	Purchase from local farmers140	Advocate for equality142

East South Central	West South Central	East North Central
Vote354	Vote384	Vote424
Limit food waste259	Recycle300	Recycle334
Attend/support religious org252	Limit food waste286	Purchase Made in USA253
Purchase from local farmers235	Purchase Made in USA246	Limit food waste214
Support food insecurity non-profits216	Advocate for a livable wage175	Advocate for a livable wage189
Purchase Made in USA210	Advocate for healthcare benefits172	Purchase from local farmers163
Advocate for healthcare benefits208	Recycle/donate clothes157	Recycle/donate clothes163
Recycle185	Attend/support religious org153	Advocate for healthcare benefits153
Advocate for a livable wage171	Purchase from local farmers142	Support food insecurity non-profits135
Recycle/donate clothes153	Support food insecurity non-profits137	Grow own food/garden135

West North Central	Mountain	Pacific
Vote413	Vote445	Vote351
Recycle365	Limit food waste307	Recycle344
Purchase Made in USA287	Recycle290	Limit food waste226
Limit food waste255	Purchase Made in USA237	Use reusable bag209
Recycle/donate clothes182	Recycle/donate clothes198	Recycle/donate clothes187
Grow own food/garden176	Grow own food/garden149	Walk/bike when possible173
Attend/support religious org167	Support humane animal practices138	Purchase Made in USA170
Use reusable bags160	Use reusable bags133	Use reusable items when out143
Support food insecurity non-profits156	Support non-food related non-profits129	Eat organic/natural143
Advocate for equality155	Advocate for a livable wage124	Advocate for a livable wage142

# About the Authors



## The Coca-Cola Retailing Research Council North America Large Store:

- Meg Ham, Ahold / Delhaize
- Susan Morris, Albertsons
- Jeff Owen, Dollar General
- Leslie Sarasin, FMI
- Bill Anderson, H-E-B
- Jeremy Gosch, Hy-Vee
- John Ross, IGA, Inc.
- Mark Tuffin, Kroger
- Greg Ramier, Loblaw
- Rick Keyes, Meijer
- Ted Balistreri, Sendik’s Food Market
- Anthony Hucker, Southeastern Grocers
- Lisa Roath, Target
- Jonathan Berger, The Consumer Goods Forum
- Nico Sumas, Village Super Market, Inc.
- Michael Sansolo, research director for the North America Council

## Who is the CCRRC-North America?

Since its establishment as the first of the Councils in 1978, the Coca-Cola Retailing Research Council North America has been dedicated to developing practical responses to strategic challenges experienced by the grocery industry and its operators through extensive industry research. The North America Large Store Council is composed of 15 visionary executives who represent a variety of retailers, from small independent operators to the nation’s largest chains. The group oversees research initiatives conducted by independent third parties on issues of strategic importance to grocers. The ultimate aim of the Large Store Council is to generate ideas and solutions by retailers, for retailers. To learn more and explore other reports, visit:

[www.ccrcc.org/councils/north-america-large-store/](http://www.ccrcc.org/councils/north-america-large-store/)



## Who is Murphy Research?

Murphy Research is a full-service market research firm that understands that groundbreaking research lies at the intersection of science and creativity. We are known for our innovative research design, rigorous executions, and enduring insights, and offer quantitative and qualitative services to help clients with market assessment, brand strategy, product development, customer loyalty and engagement, and communications research. To learn more, visit: [www.murphyresearch.com](http://www.murphyresearch.com)