

►► Sustainability and Food Retailing

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



Table of Contents

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



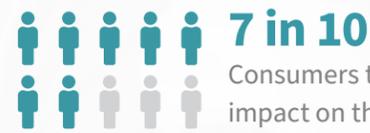
We're more alike than we are different

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.



Consumers try to reduce their impact on the environment as much as possible



Consumers go out of their way to recycle

Out of the following key attitudes, **trying to reduce one's impact on the environment** was second only to being optimistic about life or going out of one's way to recycle across almost all subgroups, including gender, age, ethnicity, income, subregion, neighborhood type, and political affiliation. In the case of Millennials, women, Asian and Hispanic individuals, people with an income of \$50K or less, and Democrats, reducing one's environmental impact was the most important out of the following list.

Personal Lifestyle Attitudes

Among total respondents

Importance

- I am optimistic about my life (69%)
- I try to reduce my impact on the environment as much as possible **(69%)**
- I go out of my way to recycle **(64%)**
- I am passionate about living a healthy lifestyle (60%)
- Living somewhere with a strong sense of community is important to me (60%)
- I am confident about my financial future (57%)
- I support brands I believe in, even if they cost more (55%)
- I prefer to shop small/local businesses (51%)
- I never feel like I have enough money to cover basic expenses (34%)

In addition, in terms of top personal goals, the following are consistently cited across all subgroups including gender, age, ethnicity, income, subregion, neighborhood type, and political affiliation:



Recycle

— 314* —



Limit food waste

— 249 —



Use reusable bags

— 152 —



Recycle/donate old clothes

— 173 —

Other top goals that are consistent across all subgroups include:



Vote

— 395 —



Purchase Made in USA

— 237 —



Advocate for a livable wage

— 171 —



Advocate for healthcare benefits

— 146 —

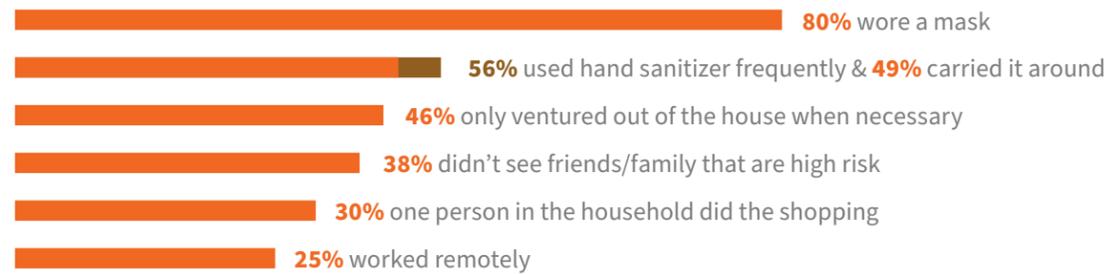


*How to read: Top personal goals were determined using a tournament followed by a ranking question with 44 goals to choose from and rank. In analysis, goals were assigned a point value depending on whether they were selected in the tournament, and how highly they were ranked. Scores were then averaged 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. The data shown here is among total respondents, and top personal goal scores by subgroups can be found in the appendix, [here](#).

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.

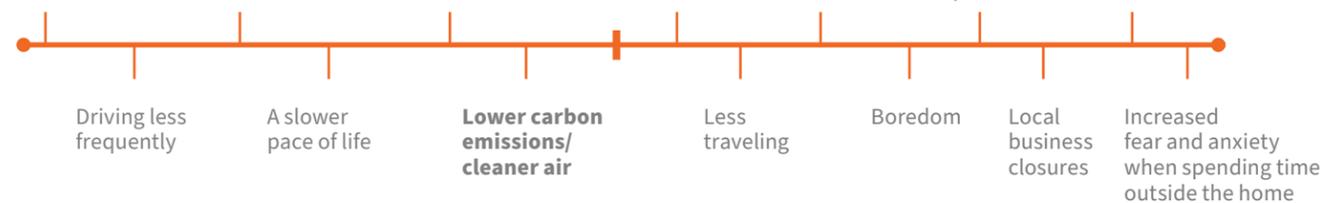
But it's also been a struggle with increased isolation and boredom leading to a decline in mental health.

Top positive changes

Spending more time at home
More time with family
Walking/getting outside more often

Top negative changes

Less social outings
Less time with friends in person
Increased stress/anxiety and/or depression
Less time with family in person



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.

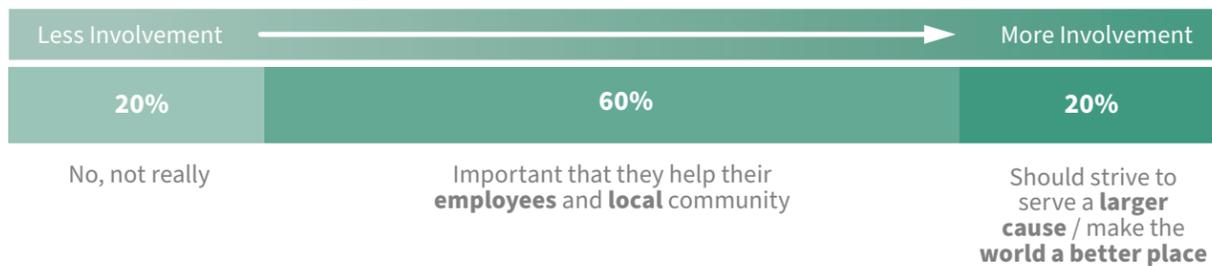


Food retailers' role in the community in general



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.

Should food retailers have a purpose other than making money?



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 consumers 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		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* —

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.



Partner with local food banks or food-related non-profits

— 264 —



In their own words...



Tim, 53, Texas

Grocery stores should buy less or take the excess and give it to the 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

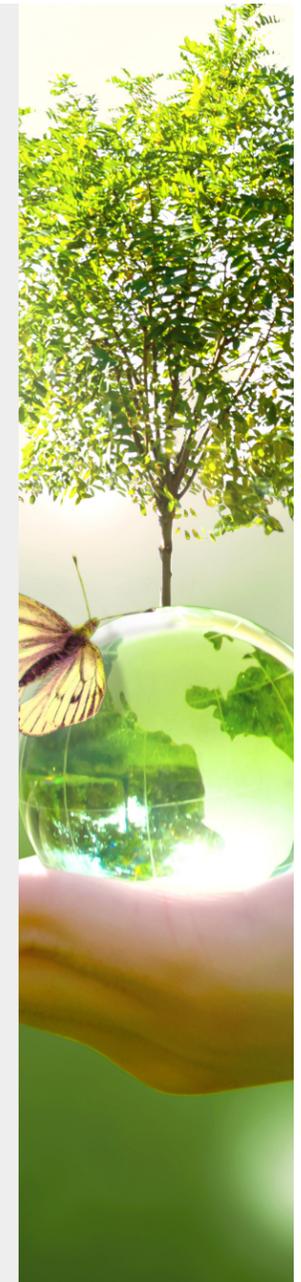
If they want to donate food for their tax write off, God bless them. I know it's for their tax write off. But it does make me happy that they're not letting the food spoil. There's too many people starving in the world.

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.



**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.*

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:



Label products that are locally made/grown

— 132* —



Sell products in a wider variety of sizes to help limit food waste

— 124 —



Don't sell products that endanger wildlife (e.g. bluefin tuna, palm oil)

— 111 —

**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.*

How to connect with the Consumer of the Future



Younger consumers have always been more cause-oriented than older consumers. Every generation has their passion projects. For Baby Boomers, it was peace. For Millennials, it was international human rights.

Gen Z's passion project is the environment

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



We found that Gen Z is much more interested in climate-focused initiatives than older generations. This is true in stores as well. Gen Z shoppers are more likely than other generations to want retailers to support conservation, support humane animal practices and take greater strides to limit the environmental impact of packaging, utensils, and bags.

Gen Z's passion for sustainability extends to their shopping behavior.

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.

Key Supermarket Attributes with Largest Significant Differences by Generation

Gen Z	Millennials	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		

Gen Z shoppers are also more interested than others in the following retail initiatives, as they over index on relative importance of these initiatives compared to other generations:

- 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

To connect with Gen Z long term, consider taking a stronger stance on sustainability and focus on initiatives that specifically limit waste and help curb climate change.

*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	Gen Z	Top 5 most interested in:	
		• 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	Millennials	Top 5 most interested in:	
		• 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	Gen X	Top 5 most interested in:	
		• 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	Boomers	Top 5 most interested in:	
		• 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



*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

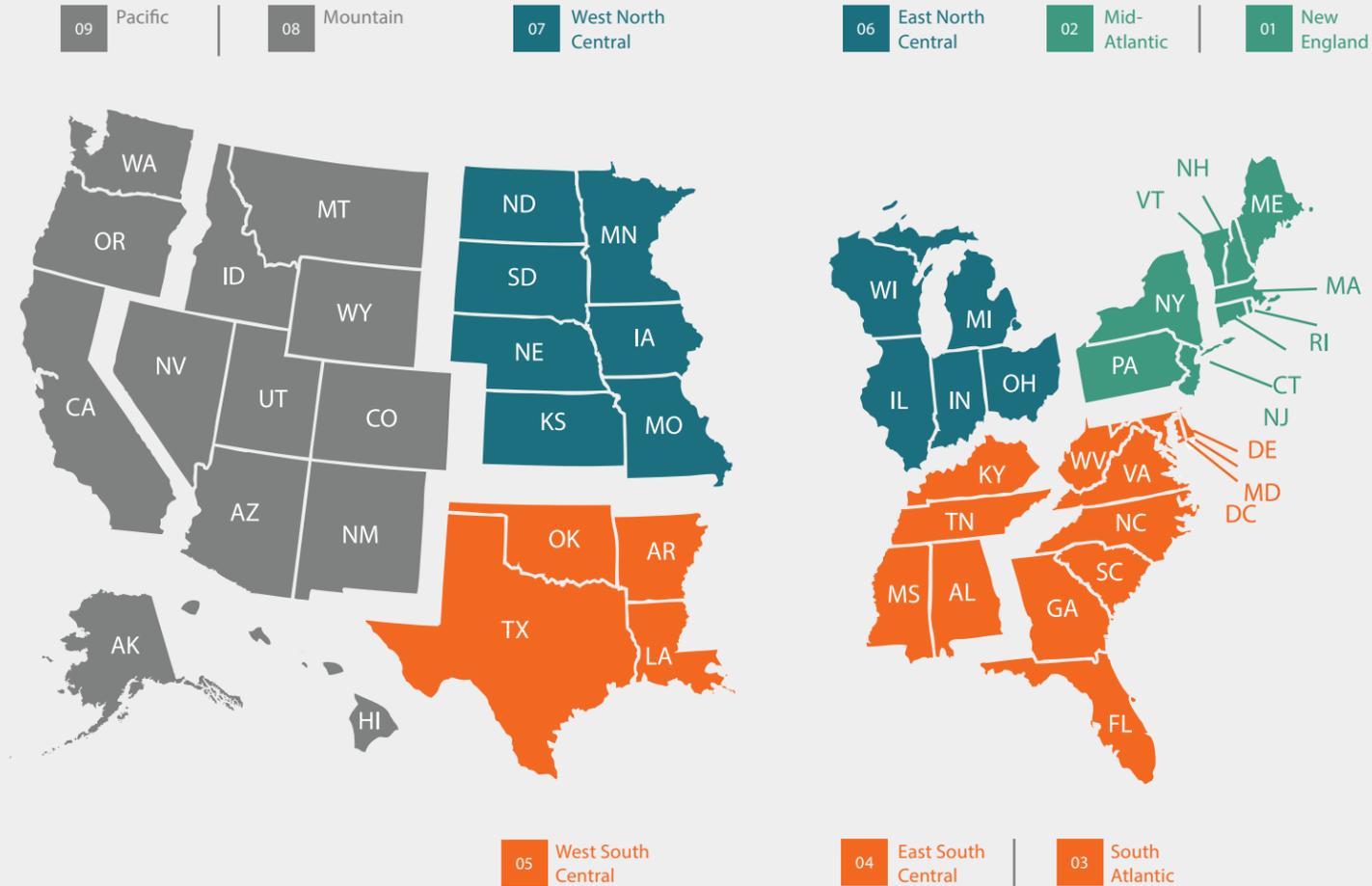
Top 5 most interested in

- 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 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 equality	243	Recycle	287	Vote	374	Vote	542
Advocate for a livable wage	229	Vote	246	Recycle	313	Recycle	352
Limit food waste	209	Limit food waste	226	Limit food waste	268	Purchase Made in the USA	287
Use reusable items when out	191	Advocate for a livable wage	175	Purchase Made in the USA	255	Limit food waste	251
Recycle	170	Purchase Made in the USA	163	Recycle/donate clothes	170	Recycle/donate old clothes	199
Supporting non-food related local non-profits	169	Walk/bike when possible	158	Advocate for a livable wage	169	Attend/support a religious org.	180
Recycle/donate clothes	164	Eat organic/natural foods	157	Purchase from local farmers	155	Advocate for a livable wage	169
Use reusable bags	153	Advocate for healthcare benefits	145	Support local food-related non-profits	145	Advocate for healthcare benefits	160
Support local food-related non-profits	147	Recycle/donate clothes	144	Use reusable bags	142	Purchase from local farmers	159
Advocate for reduced crime	147	Use reusable items when out	138	Advocate for healthcare benefits	133	Use reusable bags	147

Top 10 Personal Goals by Ethnicity

Caucasian		African-American		Hispanic		Asian	
Vote	419	Vote	252	Recycle	272	Limit food waste	362
Recycle	321	Limit food waste	243	Limit food waste	245	Recycle	334
Purchase Made in the USA	252	Recycle	220	Vote	234	Use reusable bags	269
Limit food waste	246	Advocate for a livable wage	213	Purchase Made in USA	190	Vote	249
Recycle/donate clothes	178	Advocate for equality	211	Use reusable bags	187	Recycle/donate old clothes	180
Advocate for a livable wage	175	Advocate for diversity/inclusion	195	Recycle/donate old clothes	180	Limit single-use plastics	170
Purchase from local farmers	151	Purchase Made in the USA	175	Advocate for a livable wage	174	Use reusable items when out	164
Advocate for healthcare benefits	149	Use reusable bags	163	Advocate for healthcare benefits	168	Eat organic/natural foods	160
Use reusable bags	141	Advocate for healthcare benefits	163	Support humane animal practices & standards	150	Walk/bike when possible	149
Support local food-related non-profits	136	Attend/support a religious org.	146	Advocate for equality	148	Grow your own food/garden	132

Top 10 Personal Goals by Annual Household Income

Under \$50,000		\$50,000-\$99,000		\$100,000-\$199,000		\$200,000+	
Vote	317	Vote	420	Vote	467	Vote	423
Recycle	287	Recycle	317	Recycle	341	Recycle	337
Limit food waste	286	Limit food waste	238	Purchase Made in the USA	242	Limit food waste	222
Purchase Made in the USA	246	Purchase Made in the USA	238	Limit food waste	219	Walk/bike when possible	180
Advocate for a livable wage	179	Advocate for a livable wage	177	Recycle/donate clothes	182	Recycle/donate old clothes	164
Recycle/donate clothes	177	Advocate for healthcare benefits	167	Advocate for a livable wage	156	Use reusable bags	162
Use reusable bags	162	Recycle/donate old clothes	165	Purchase from local farmers	152	Purchase Made in the USA	160
Support local food-related non-profits	156	Use reusable bags	150	Use reusable bags	137	Advocate for a livable wage	149
Purchase from local farmers	153	Purchase from local farmers	140	Walk/bike when possible	132	Support orgs that focus on the environment & sustainability	133
Advocate for healthcare benefits	146	Attend/support a religious org.	140	Advocate for healthcare benefits	130	Attend/support a religious org.	132

Top 10 Personal Goals by Political Affiliation

Republicans		Democrats	
Vote	394	Vote	488
Purchase Made in USA	299	Recycle	359
Recycle	246	Limit food waste	310
Limit food waste	207	Advocate for a livable wage	252
Attend/support a religious organization	195	Advocate for equality	215
Recycle/donate clothes	183	Advocate for healthcare benefits	193
Purchase from local farmers	154	Use reusable bags	172
Grow own food/garden	151	Recycle/donate clothes	151
Support local food insecurity non-profits	145	Purchase Made in USA	136
Advocate for a livable wage	143	Support local food insecurity non-profits	131

Top 10 Personal Goals by Subregion

New England		Mid Atlantic		South Atlantic	
Vote	342	Vote	348	Vote	451
Recycle	340	Recycle	302	Recycle	309
Use reusable bags	210	Limit food waste	282	Purchase Made in USA	283
Advocate for a livable wage	197	Purchase Made in USA	225	Limit food waste	245
Purchase Made in USA	192	Advocate for a livable wage	198	Recycle/donate clothes	180
Recycle/donate clothes	182	Use a reusable bag	184	Advocate for a livable wage	177
Limit food waste	181	Walk/bike when possible	169	Purchase from local farmers	153
Support humane animal practices	168	Recycle/donate old clothes	160	Support food insecurity non-profits	152
Purchase from local farmers	163	Advocate for healthcare benefits	145	Advocate for healthcare benefits	145
Actively work on reducing carbon footprint	135	Purchase from local farmers	140	Advocate for equality	142

East South Central		West South Central		East North Central	
Vote	354	Vote	384	Vote	424
Limit food waste	259	Recycle	300	Recycle	334
Attend/support religious org	252	Limit food waste	286	Purchase Made in USA	253
Purchase from local farmers	235	Purchase Made in USA	246	Limit food waste	214
Support food insecurity non-profits	216	Advocate for a livable wage	175	Advocate for a livable wage	189
Purchase Made in USA	210	Advocate for healthcare benefits	172	Purchase from local farmers	163
Advocate for healthcare benefits	208	Recycle/donate clothes	157	Recycle/donate clothes	163
Recycle	185	Attend/support religious org	153	Advocate for healthcare benefits	153
Advocate for a livable wage	171	Purchase from local farmers	142	Support food insecurity non-profits	135
Recycle/donate clothes	153	Support food insecurity non-profits	137	Grow own food/garden	135

West North Central		Mountain		Pacific	
Vote	413	Vote	445	Vote	351
Recycle	365	Limit food waste	307	Recycle	344
Purchase Made in USA	287	Recycle	290	Limit food waste	226
Limit food waste	255	Purchase Made in USA	237	Use reusable bag	209
Recycle/donate clothes	182	Recycle/donate clothes	198	Recycle/donate clothes	187
Grow own food/garden	176	Grow own food/garden	149	Walk/bike when possible	173
Attend/support religious org	167	Support humane animal practices	138	Purchase Made in USA	170
Use reusable bags	160	Use reusable bags	133	Use reusable items when out	143
Support food insecurity non-profits	156	Support non-food related non-profits	129	Eat organic/natural	143
Advocate for equality	155	Advocate for a livable wage	124	Advocate for a livable wage	142

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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/



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